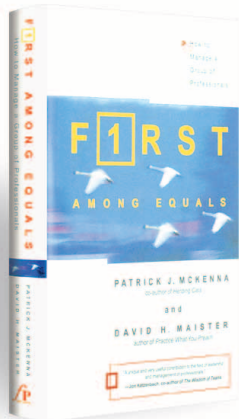


# SOUNDVIEW Executive Book Summaries®

FILE: HANDS-ON MANAGEMENT



Patrick J. McKenna and  
David H. Maister

A Guidebook for How Group Leaders Can Manage  
the Unmanageable

## FIRST AMONG EQUALS

### THE SUMMARY IN BRIEF

*Managing people is difficult, particularly when you are tasked with leading a group of confident, intelligent professionals — often used to working with a certain amount of autonomy — to accomplish some task or essential goal. Group leaders must be skilled not only in management basics (delegation, decision-making, running meetings, and so forth), but also in the “softer” skills of inspirational leadership practices.*

*Crammed with concrete advice and practical applications and examples, First Among Equals, written by two leading experts in the field of managing professionals, will help you inspire, cajole and provoke your people to reaching their full capabilities and promise.*

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### What You'll Learn In This Summary

In this summary, you will learn how to do the following:

✓ **Get ready to lead.** Before you lead, you must clarify the responsibilities and parameters inherent to your role as leader, to ensure that you add value to the group's activities. You also need to confirm your mandate to lead, then build relationships with each individual on your team — inspiring (not just managing) your people.

✓ **Coach your people as individuals.** You must understand what coaching entails on a one-to-one basis — what things, both formal and informal, you can and should do to be most effective.

✓ **Coach your teams as a whole.** Improving the performance of your group as a whole involves many things, including building trust within the team, selecting goals that challenge and energize your people, and acknowledging accomplishments (individual and collective) through recognition.

✓ **Build toward future successes.** Maintaining a high level of efficiency in your groups is an ongoing process; you must build on your successes by nurturing junior members of your group, keeping membership to a manageable size and learning how to properly integrate new people into the collective whole.

# FIRST AMONG EQUALS

by Patrick J. McKenna and David H. Maister

## — THE COMPLETE SUMMARY

### GETTING READY

## Clarify Your Role

Your job as a group leader is to help your people, and your team, win — to be a catalyst between people with different skills and work styles, diverse experiences and (sometimes) conflicting priorities. Playing such a role is not always easy. Most times, group leaders spend their entire working lives focusing on their own individual performance; to be successful, group leaders must have a willingness to focus on other people and their success (attitude) and the ability to influence others without being domineering (skill).

### *Pushing for Greater Commitment*

Most often, you will be working with talented people who know what to do to be successful, but who simply aren't doing it. In these cases, your role as group leader is to help people fulfill that potential by influencing their attitudes, feelings and emotions in order to raise their performance and commitment level.

There are a number of actions you should take to raise the levels of enthusiasm, excitement and performance in your group. First, you need to spend time informally coaching and developing both senior- and junior-level group members. Conduct formal performance reviews, as well as post-review coaching and counseling, when required. Celebrate individual and group achievements, both small and large.

You should also be in touch with other group members' clients, in order to help them better satisfy those clients and grow those relationships. Also, help the group explore new and innovative uses of technology to better deliver service and reduce costs. ■

For examples of what you can do for your group, go to:  
<http://my.summary.com>

## Confirm Your Mandate

Before you can effectively manage your group, you must ensure that you have reached agreement (with your superiors and fellow group members) on your "terms of engagement," or your mandate. You might think everyone around you already shares the same view of your

## Know Your Tasks

It is important for you to define (with your own management, as well as those in your group) which tasks you will perform. If you and your group are to succeed, it is necessary for you to agree upon (and write down) your role, responsibilities, accountabilities and performance measures.

mandate, but this might not be the case. What are your priorities? What does management expect of you? What do your fellow group members expect of you?

### *Terms of Engagement*

In addition to reaching agreement on your role, your terms of engagement should include the following:

**1. Time to do the job.** Probably the single biggest source of failure in making professional groups work is not giving the group leader sufficient time to perform his or her job. When leaders are expected to be as fully busy as anyone else on client or production work, the job of group leadership does not receive the priority it requires. Enabling group leaders to give leadership activities priority has both qualitative and quantifiable results for a business.

**2. Your right to coach.** A major part of a group leader's real value comes from discussing individual

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**The authors:** Patrick J. McKenna, a partner in Edge International (Edmonton, Canada), and David H. Maister, co-author of *The Trusted Advisor*, are internationally renowned experts on managing professional service firms.

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For more information on the authors, go to:  
<http://my.summary.com>

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### Confirm Your Mandate

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performance and engaging in effective follow-up with individual members of the group. This follow-up may include simply reminding your colleagues about a project, or following up with a client.

#### 3. Your performance criteria and compensation.

Group leaders should be measured and appraised predominantly by how well their group has done, and whether they have undertaken the appropriate steps and activities to raise that performance. Leaders should not be paid more simply for assuming the role.

#### 4. Input on the compensation of team members.

While the group leader should not be the sole source of performance review or the sole determinant of compensation, he or she should be enabled to provide formal input to both those things for each member of the group.

**5. Valuing everyone's non-reimbursed time.** Much of what groups do to create their future success involves investment of non-reimbursed time in activities that build the future of the business, such as marketing activities, tool development and so forth.

#### 6. What you need from your firm's leadership.

Firm leaders need to be dedicated and committed to the success of group work at your company, particularly if the traditions of groups and group leadership are not yet well established. To demonstrate their commitment, they should: let everyone know that having effectively functioning groups is a high priority; encourage those who are reluctant to get on board; volunteer to attend group meetings; be enthusiastic cheerleaders; develop cross-functional group leader councils; and schedule periodic progress reviews. ■

For more on the quantitative benefits of leadership, go to: <http://my.summary.com>

## Build Relationships — One at a Time

While your technical competence and knowledge will determine a portion of your effectiveness as a group leader, your real success will turn on whether you are received by your people as a trusted advisor — that is, as a group leader to whom colleagues would turn eagerly and regularly for advice, guidance and counsel.

When considering how well you build relationships, ask yourself these questions:

● **How many of those that you have the responsibility to coach would consider you their trusted advisor?** A trusted advisor helps you see things in a new

## Having a “Deep Insight into People” Pays Off

One of the most effective managers the authors have ever met was Don Groninger, the onetime general counsel for Bridgestone/Firestone. Groninger was always looking for ways to advance the careers of his people, even (or especially) if this meant their being promoted out of his legal group. In the words of one of his people:

“He had a deep insight into people and could discover and nurture strengths that others might not see. He paved the way for you to take on stretching challenges, expected you to produce results and, without ego, trusted you to run with the ball, calling on him only when you felt the need to. He did not micromanage, but when you asked for guidance, what you received was the wealth of his ‘book learning’ as well as his ‘street smarts.’ I don’t know that he was ever wrong in the advice he gave me.”

way — this is different from telling you what to do.

● **Do you actually like the people you're coaching, and do they know you like them?** If they don't, your effectiveness as a coach will diminish, regardless of the intellectual rigor of your comments.

● **Do the people you're seeking to coach actually view you as being someone who cares about others?** Do they think you care specifically about them? You must be viewed as honorable, trustworthy, consistent and dependable as well.

● **Can you help your people to visualize and articulate their dreams?** You need to understand each of your people in such a way that you help each one develop an individualized, custom-tailored approach to development, one that excites and challenges them.

● **Are you investing time toward building a strong relationship?** You need to show interest in your people, understand their needs, spend time with them away from your tasks at hand and, in general, be willing to give of yourself in order to earn their trust and confidence.

● **Do people feel comfortable admitting their flaws to you?** It takes considerable emotional investment to be an effective group leader, to make your people feel comfortable coming to you in any circumstance, even to confess a weakness to you.

● **Do you always act and offer your advice in the best interests of your people?** Be sincere with your people and lead by example. If you act as if you want everyone to succeed, your group will follow you toward achieving that success. ■

### Dare to Be Inspiring

Your group will best achieve peak performance by unleashing the power of your people. This is done not by managing or leading them, but by inspiring them. There are individuals in every profession who strive to create big dreams, steeped in a strong set of personal values, in setting high standards and in striving to lift the spirits of human potential. This is not about management, nor is it strictly about leadership — it goes beyond what either of those two words might mean to us.

Inspiration is all about the details — every conversation you have with someone advances, diminishes, or leaves neutral your relationship with that person. Here are some other details—things you must do in order to inspire your people:

- **Show a genuine interest in what your group members want to achieve.** Too few group leaders bother to pay attention to what their people want and need in developing their careers; this, however, is a critical part of your role as a group leader. Do not lose good people or abet sub-par performance by not showing that interest.

- **Show an interest in the things that mean the most to your people in their personal lives.** In order to get the best you can out of people, it is helpful to get to know

a bit about their personal lives — their families, leisure-time interests, the things they are most passionate about. You cannot build a successful business enterprise if everyone merely stays in a role and deals with others merely in functional or logical terms. You cannot separate your performers from who they are as human beings.

- **Be there for your people in times of personal or professional crisis.** Right now, as you read this, it is very likely that some member of your group is facing a crisis or transition. Are you aware of it?

- **Informally “check in” with each of your people.** If a group leader simply takes a few minutes to listen to his or her people — particularly in a time of high pressure or frustration — something special can happen. You can ease a burden, recharge a battery, or provide encouragement exactly at the point in which your people need it.

- **Offer to help when they truly need it.** Offer to pitch in and help your people get their work done in busy times, lightening their load and helping them through a rough period. If you want people to accept your influence in the future, help them now. ■

To learn how conductor and teacher Benjamin Zander inspires his students, go to: <http://my.summary.com>

## COACHING THE INDIVIDUAL

*Once you have confirmed your mandate, built relationships within your group and learned what it takes to inspire and not simply lead, you are ready to tackle in greater detail the leadership, management and coaching activities so vital to being a group leader. You must be able to get your people to accept your guidance, build rapport with them by listening to them and deal with the exigencies that arise when working with different individuals. ■*

### Win Permission to Coach

Coaching is an activity, not a title or a position. It is the process by which you help another person fulfill his or her potential, and it requires that you judge well when to intervene, and when to stay away. Indeed, before you can even begin to develop and stretch your people's talent, you must assess whether you have earned the “right” to be able to do so. Here are some basic steps that may help you win permission to coach:

- **Ask how things are going.** Find out what is on the person's mind and identify any available opportunities to help that person expand his or her skills.

- **Confirm that the individual is ready for coaching.** Focus on an issue that the person seems most interested in or concerned about, and let him or her know that you are available to provide guidance, ideas or feedback.

- **Ask questions to clarify the situation, and offer support and assistance.** Phrase your questions carefully, so they do not pressure the person or imply a negative reaction. Draw out facts, and determine if he or she has the right information to move forward.

- **Offer information as appropriate.** Offer only necessary information, providing whatever the person needs to choose a course of action.

- **Listen actively.** If necessary, take some brief notes. Don't interrupt with your own ideas. Always look to build rapport through listening.

- **Help the person identify possible courses of action.** Avoid offering any of your own ideas until after the person you are coaching has finished. Encourage him or her to think aloud, and make a list of the ideas generated, without commenting on feasibility.

- **Agree on the next step.** Prompt the person to make a firm commitment to action and clarify the steps he or she is planning to take, and by when.

- **Offer your personal support and confidence.** Conclude by expressing your continued interest, your confidence in your colleague's ability to resolve the issue, and your desire to help, if and where you can do anything that would support him or her in accomplishing the specified objective. ■

## Tackle the Prima Donnas

We all know the type. They are brilliant at what they do, and make outstanding creative and financial contributions to your group's success. The only problem is that, people of high achievement can sometimes insist stubbornly on having their own way, and can often be contemptuous of others. In many cases, absolutely no one else wants to work with them. Here are a few things to keep in mind:

✓ **Focus on behavior, not personality.** Giving feedback that comments on someone's personality traits is destructive. The individual will only become defensive and subsequently turn off. If it is behavior change that you're after, point out the specific actions in question.

✓ **Tell your colleague what behavior needs to change, clearly and specifically.** Try to be as objective as possible. Concrete examples — something you have observed first hand, or a situation that has been brought to your attention — will help the individual understand where the problems lie and show that you are not jumping to conclusions.

✓ **Place the situation in the context of career development.** It is important to let prima donnas know what's in it for them if they change their behavior; how they will be more valuable to the firm, acquire more respect from people around them, and even how it may affect their clients. Point out that they run the danger of alienating the people whose cooperation they need. If you come across as being critical, you may get a grudging acknowledgment, but you are not likely to achieve observable or long-term behavior change.

✓ **Set small, realistic goals.** Micro changes in behavior can be big victories. Change is achieved step by step.

## Deal Differently with Different People

Not every individual can be managed or inspired the same way. A manager must learn to deal with each individual according to the things that energize that individual. One place to start is in trying to understand different people and how they like to be treated. To that end, we turn to the work of Dr. David Merrill, who discovered two clusters of behavior that are helpful in predicting how individuals are likely to behave in certain situations:

● **Assertiveness.** In its most practical form, an individual's level of assertiveness is the degree to which he or she is seen by others as being forceful or directive. More assertive people are "tell" people — they exert pressure for a decision, and are pointed in expressing opinions, sometimes at great volume. Less assertive people are "ask" people, who tend to be more subdued in their expressions, pre-

ferring to ask in order to gauge how others feel about a situation, to collect as much information as possible.

● **Responsiveness.** With this cluster, you are looking for how people express themselves and how they react. More responsive people tend to be emotive, appearing friendly, with an expressive countenance and engaging easily in small talk and sharing personal feelings. A more reserved and less responsive person may appear poker-faced, so that you are never quite sure whether he or she is in agreement with what you are saying. These people may indeed have strong feelings; they are just less likely to display them.

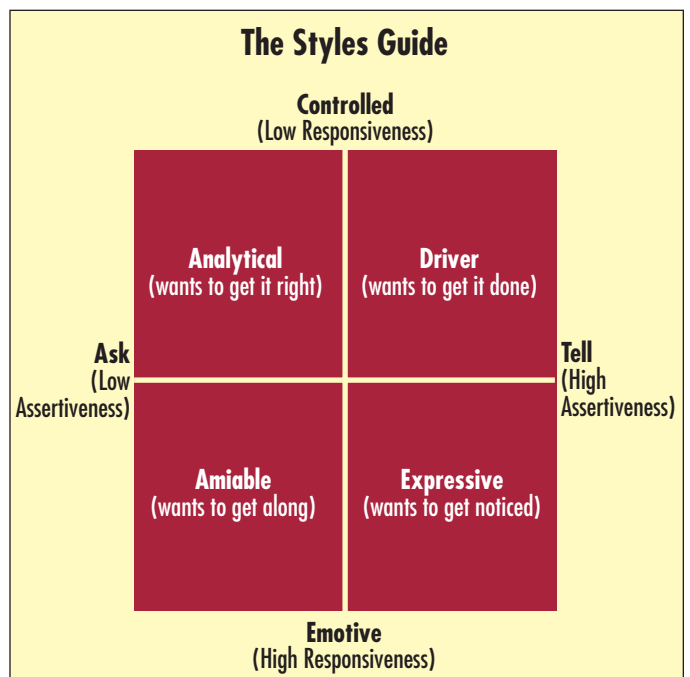
Putting the two behavior clusters together gives us an idea of what particular individuals are like, where they may be coming from, what their expectations are and how you need to work with them.

We see four distinct behavior groupings that you will likely deal with as a group leader:

● **Drivers.** Drivers are people who are highly assertive, but low in responsiveness. They are most comfortable when they are in control of themselves, the work environment and their client transactions. Drivers like to make up their own minds, and will likely be put off if you simply offer them a course of action. Therefore, when coaching drivers, present any recommendations with alternatives, together with any documentation or examples you can offer. Remember that managing drivers is not easy, because often they want to manage you!

● **Analyticals.** Analyticals are low on both responsiveness and assertiveness. They are obsessed with getting information — they crave data and often agonize over decisions, wanting to be certain of making the right choice.

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### Deal Differently with Different People

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They thrive on specifics; in order to build a coaching relationship, you need to be well organized and clear, explaining your thoughts systematically and expecting to be asked a lot of questions about the situation or subject at hand. When proposing a course of action, explain both the advantages and downsides of the action. When recognizing Analyticals' work, do so privately, in specific terms, being concise and simple in your feedback.

● **Amiables.** Amiables are low on assertiveness, but high on responsiveness. They project sensitivity to others' feelings, exhibit great patience and believe it important that they take time to establish relationships. When coaching amiables, allow plenty of time to explore their thoughts and feelings. Be sure to deal with one subject at a time,

one step at a time, making sure the amiable is ready to move from one topic to the next before doing so. Appeal to their need to strengthen relationships, and acknowledge their contributions, their teamwork and their dependability.

● **Expressives.** Expressives are high on both responsiveness and assertiveness. They are not hesitant about making their presence or feelings known, and are often highly intuitive and can be highly persuasive when they combine their personal power and emotional display. They are inclined to informality; when meeting with them, take a few minutes to build rapport and show them you are interested in them as people. Provide them with an opening to talk about themselves. When coaching them, don't overwhelm them by allowing them to jump into a course of action before they're ready, as is their proclivity. Help them channel their enthusiasm with reminders and hands-on assistance, to help them prioritize and organize. ■

## COACHING THE TEAM

*Once you understand how to manage the members of your group as individuals, you must turn your attention to managing the group as a group. Not only must you be able to understand and influence individual people, but you must understand and influence a significant number of them simultaneously. Three of the things you must do are the following:*

- **Build team trust.**
- **Throw down a challenge.**
- **Give recognition.** ■

### Build Team Trust

Everyday frustrations can lead to lost energy in a group, as suspicion, unresolved issues, forgotten commitments, missed deadlines and other issues lead to lost trust between group members. While trust is often an unspoken issue, it is critical to the cohesion of a group. If you don't have trust, people won't cooperate, won't be committed and won't know where they stand.

Before engaging in any trust-building initiatives, you should understand some of the elements of trust, and what you can do about them:

● **Sharing.** Group members need to feel comfortable with sharing things about themselves with the group, from personal attributes or accomplishments, to mistakes or failures. By talking about these things, they take risks, but by taking those risks, the group moves to a deeper level of trust. Trust needs to be earned.

● **Following through on commitments.** Unfulfilled promises bleed away your team's energy. Address the reasons for a member's failure to follow up on a commitment, in order to prevent that failure from eating

away at any trust or goodwill specific members have built for each other.

● **Letting people know if you can't do something.** Failure to confirm agreement to a course of action breeds uncertainty, hesitation, doubt, resentment and lack of trust. Encourage your people to confirm specifics when partnering with others to get a task or job done. ■

### Throw Down a Challenge

Common wisdom suggests that offering generous extrinsic rewards (money) gets people to increase their performance. But money isn't the whole story; people are moved when they have a clear set of challenges before them — solving a complex problem, discovering something new, etc.

What challenges each member of your team is largely indigenous to each individual, in his or her desires, dreams and aspirations. Your job is to find the proper balance between the action opportunities that are available and the individual skills sets of your people.

Of course, the challenges you throw down must benefit the group as a whole, as well. Once you set a goal, you need to create a powerful and urgent reason to achieve that goal, building a case for action that is based on facts and real business needs. Try the following process:

● **Ask the members of your group to articulate what's in it for them.** Discuss with each person in the group what opportunities the challenge pose for them, to get their buy-in and focus from the start.

● **Give everyone the opportunity to stand up and declare his or her personal commitment.** Everyone in the group is ultimately a volunteer — they must choose

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### Throw Down a Challenge

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to be in or out.

- **Focus first on what you can do now, with existing resources.** Ensure your people do not become overwhelmed or discouraged by the complexity of the challenge. Try to produce tangible short-term results.

- **Encourage experimentation.** Encourage people to create something fundamentally new, to benefit your clients and your group as a whole.

- **Build for an early success to continue the momentum.** Remind the team of what is at stake, what the big picture holds, what larger meaning your challenge has for your enterprise and how that challenge will help your people leave their mark.

- **Search continually for opportunities for people to create or outdo themselves.** Find new ways for people to solve problems, explore new ground and deal with external challenges. And try at all times to make it fun.

- **Set unreasonable expectations.** When your objectives seem outlandish, you are forced to think differently about your opportunities. Set the upper limit on what people think is possible, and challenge your people to exceed it.

- **Focus on the excitement of the endeavor.** The influence and expectations you generate as a leader ultimately contribute to the abilities of your people to grow within the environment you provide for them. ■

### Develop Your Group's Rules of Recognition

One of the major problems of groups is that they often have no explicit, shared agreement on what it means to be a group. They have not discussed, let alone reached a consensus on, what responsibilities they owe to each other, nor

on what principles their group will operate. Many so-called groups are really just collections of people who, in subtle ways, are each simply pushing their own special interests.

What is needed is an approach that will create a more inspiring system that provides for higher levels of shared enthusiasm, decision making, performance, participation, and morale. This can be done by basing your group on three fundamental principles:

- **Set Levels of Mutual Accountability.** A basis for every championship team, in every endeavor, is having hard-and-fast, nonnegotiable “ground rules” that everyone agrees to abide by. Great groups formulate and commit to writing a set of ground rules for how their team will work together and how they will manage themselves, thus bringing about constructive peer pressure.

For example, is it acceptable for group members to confront those who don't complete the projects that they have accepted responsibility for? Those who place their personal agenda ahead of the group's goals? In great groups, the players police themselves. People hold themselves, and each other, accountable. The essential principle is that the group collectively sets and manages the ground rules, and the ground rules then manage the group.

- **Set Levels of Shared Contribution.** A good place to start is to ask how much “investment” time each person is willing to commit, beyond their normal production or client-serving workload, to furthering the group's objectives. The next challenge is to ensure that people appreciate that the investment time contributed to the group is for projects and activities that will benefit the group as a whole.

- **Establish Your Shared Values.** Excitement, energy and pride (and thus the accomplishment that drives financial success) can be created by building agreement that the group will conduct its affairs to higher standards than the group's competitors. The group voluntarily accepts greater discipline in monitoring and enforcing excellence, never settling for competence. ■

## BUILDING FOR THE FUTURE

*Maintaining a high level of efficiency and success in your groups is an ongoing process—a journey, rather than a destination. As such, you must always keep the future of your group in mind, tuning in to the things you need to do to build on your successes. These things include the following:*

- **Nurture your juniors.**
- **Integrate new people.**
- **Control your group's size.** ■

### Nurture Your Juniors

Junior staff, by definition, are at the early stages of a

career, and need one thing above all — the chance to develop and build their skills. How well skills are built depends on two key processes:

- **Work assignment.** What projects do the junior members get to work on? Over what part of the project are they given responsibility? A good model to follow is one where all the senior people get together regularly and jointly allocate junior staff to projects, taking into consideration the best resources to provide to key clients, providing developmental work experiences, keeping motivation and morale high, and a number of other considerations.

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### Nurture Your Juniors

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● **Work supervision.** What quality supervision do junior members receive while working on assigned projects? Unfortunately, many groups do not have a consistent agreement on what constitutes appropriate standards for supervising work. You should engage your senior colleagues to establish standards in your group, rather than simply trying to impose standards on them. It is, however, imperative to establish some consistent expectations and accountabilities; junior members are entitled to them.

#### *A Sample of Supervision Standards*

There are some standards of behavior in work supervision that must be considered and enforced. Junior group members are entitled to certain expectations; among them are the following:

- **They understand thoroughly what is expected of them when assigned a task.**
- **They understand how their assigned tasks fit into overall objectives for a project.**
- **Help is available when they need to have questions answered.**
- **They receive prompt feedback, good or bad.**
- **They are actively encouraged to volunteer new ideas and make suggestions for improvement.**
- **In each engagement, high standards for performance are set and enforced. ■**

### Integrate New People

It takes time and effort to integrate a new member to a team, to keep the new member from floundering, creating conflict, or worse. As good people become harder to find, your internal processes for orientation and integration become absolutely critical. After all, you're not just hiring a warm body; in most cases, you're adopting a new colleague into your family. Take some essential steps to properly integrate these new people, including the following:

- **Manage first impressions.** Design an orientation program that provides information to people as soon as they arrive. Remember to introduce your group to the new person, and the new person to your group.
- **Give them support — before they ask.** New people require a clear understanding of their group's expectations, as well as introductions to specific people who can support them in getting up to speed on tools, technology, even the basic layout of your work area. It is up to the group leader to organize the investment in time necessary to make the new team member feel welcome.
- **Make them feel valued.** High-quality internal training

programs not only give people the skills they need, but also send the clear message that you care about people's career development and are willing to invest in them as individuals.

● **Provide an immersion experience.** Orientation systems that steep newcomers in the personalities and culture of their new group build career-spanning relationships that support success in their new environment. Think bonding. Think teamwork.

● **Communicate, communicate, communicate.** Groups that take internal communications seriously tend to do a far better job of retaining their best members. Use the tools at your command (voice mail, e-mail, internal newsletters, etc.) to assess results, celebrate strengths and solicit feedback from your people. ■

### Control Your Group's Size

Bigger does not always mean better, and nowhere is that more evident than when it comes to measuring group effectiveness. One of the most certain ways to ensure failure is to allow membership to grow beyond a small, solid working group. When groups balloon in size, they often decrease in effectiveness — group members feel no real sense of attachment or personal commitment, and often find themselves spending many nonproductive hours in group meetings.

The more people in a group, the less commitment any one person shows to following through on individual projects, and the less buy-in any individual has for the group's success or failure. To avoid these problems, keep your groups small, by trying one of the following options:

● **Downsize your groups.** When new groups are formed, insist that they include fewer than a dozen people to start. Reorganize existing groups into smaller units. It may not be easy to remove some people from some groups, but the long-term impacts on productivity make this effort critical.

● **Use a "resource member" approach.** A core group should consist of only those whose full-time efforts are involved in the specialized area. This group is the decision-making body for the area, with others providing assistance or expertise as the need arises, at the discretion of the group leader. Each person chooses one core group to belong to, but they will also serve as "resource" members for other groups, according to preference or client work in those areas. As resource members, they can keep tabs on group activities, but they are not expected to volunteer for projects in that area, unless a specific task or project might involve or benefit an individual client.

● **Create splinter groups.** Break up larger teams into smaller, practice-specific splinter groups, usually defined by the distinctive clients the group seeks to serve. Not only will these focused groups be smaller, but they will have more in common and will be more likely to function as an integrated team. ■