

18. Team composing

Defining the S&OP process

See also the tool about personality profile analysis

For a full overview of the tools see:

Stentoft, J., Freytag, P. V. & Mikkelsen, O. S. (2019), *Improved Competitiveness through Implementation of Sales & Operations Planning*, Department of Entrepreneurship and Relationship Management, University of Southern Denmark.

Purpose, participants and application

- **Purpose**

- To compose an effective Sales & Operations Planning (S&OP) team and to create consciousness about how the team can compensate for a lack of certain team roles.

- **Participants**

- Top management, middle management and the S&OP team.

- **Application**

- In defining the S&OP process.



The well-functioning team

1. The team works in a disciplinary way from a known, understood and accepted mission and well-defined goals.
2. Professional, experience-based and personal resources are used at their optimum.
3. The team has agreed on distribution of responsibility in the form of different team roles.
4. An optimal relation between personal resources and team roles exists.
5. The team focus and handles the fundamental necessary working processes (cf. The DiamondChain®).
6. The team members understand and accept the mutual dependency which exists between the 8 team roles.
7. Dissimilarity and diversity are considered valuable.
8. The team members know, understand, respect and value individual differences.
9. The team is actively involved in internal problems of balancing its own composition.
10. Leadership is practiced in due agreement with the development phase and need of individual team members and the team (according to B, Tuckman).

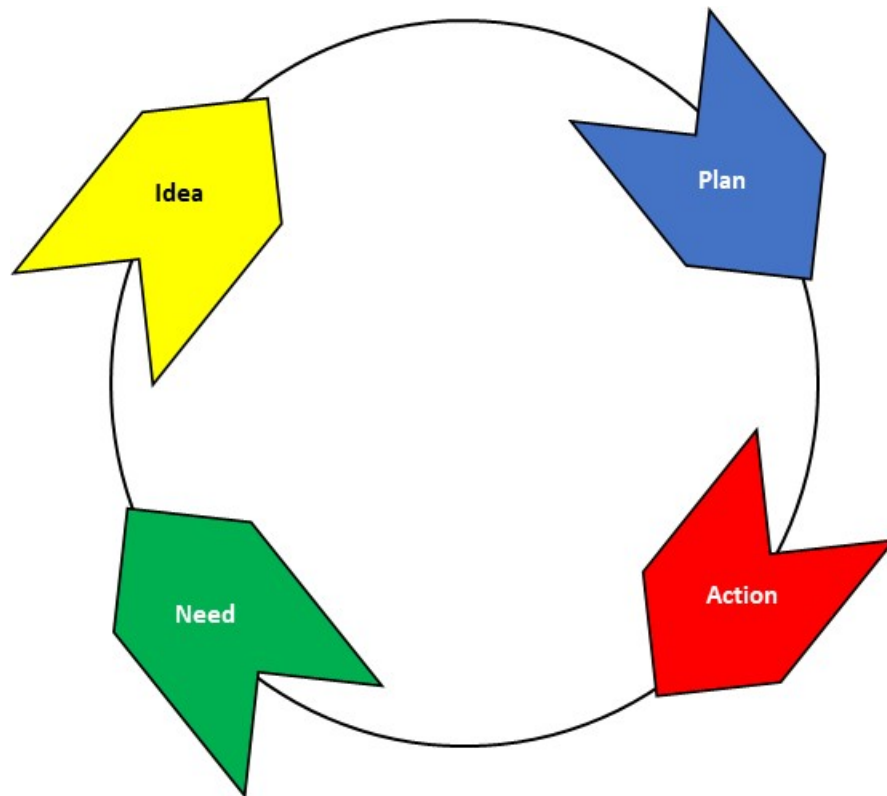


Tuckman's team model

Stage	Characteristics
Forming	The forming stage is concerned with the groups formation and will answer why we are here. Typically, there is confusion, uncertainty, haziness, lack of common engagement, and time is used to settle.
Storming	The storing stage is concerned with who should do what. Battles about priorities and influence begin to take place; tensions can arise with conflicts and confrontations. There is a low degree of trust, creation of crowds and hidden agendas.
Norming	The norming stage has focus on how tasks best is solved. Rules and standards are established. Trust is developed; roles are divided and are stable. There is consensus.
Performing	The performing stage is concerned with how the team retained. There is focus on synergy; the team is playing each other well. The team support each other. One think more about the team than oneself. There are flexible roles and openness.
Adjourning	The adjourning stage was added in 1977 and is focused on how the team break up. There is focus on relationships between team members and what will happen, when the team no longer exists.

Sources: Broegger, B. & Bohnsen, L. (2015), *The TeamDiamond®: Team Building using Jungian Typology*, Broegger Organizational Psychologists, Aarhus, p. 13.; Tuckman, B.W. (1965), "Developmental sequence in small groups", *Psychological Bulletin*, Vol. 63 No. 6, pp. 384-399.; Tuckman, B.W. & Jensen, M.A.C. (1977), "Stages of small-group development revisited", *Group & Organization Studies*, Vol. 2 No. 4, pp. 419-427.

4 strategic core work processes



- **Need:** Which needs are relevant to consider in solving the tasks or according to the actual decision?
- **Idea:** Which idea can we generate on the basis of the needs uncovered?
- **Plan:** Which objectives and plans can we draw up concerning the realization of the chosen idea?
- **Action:** How do we carry the defined plan out and bring it to a closure?

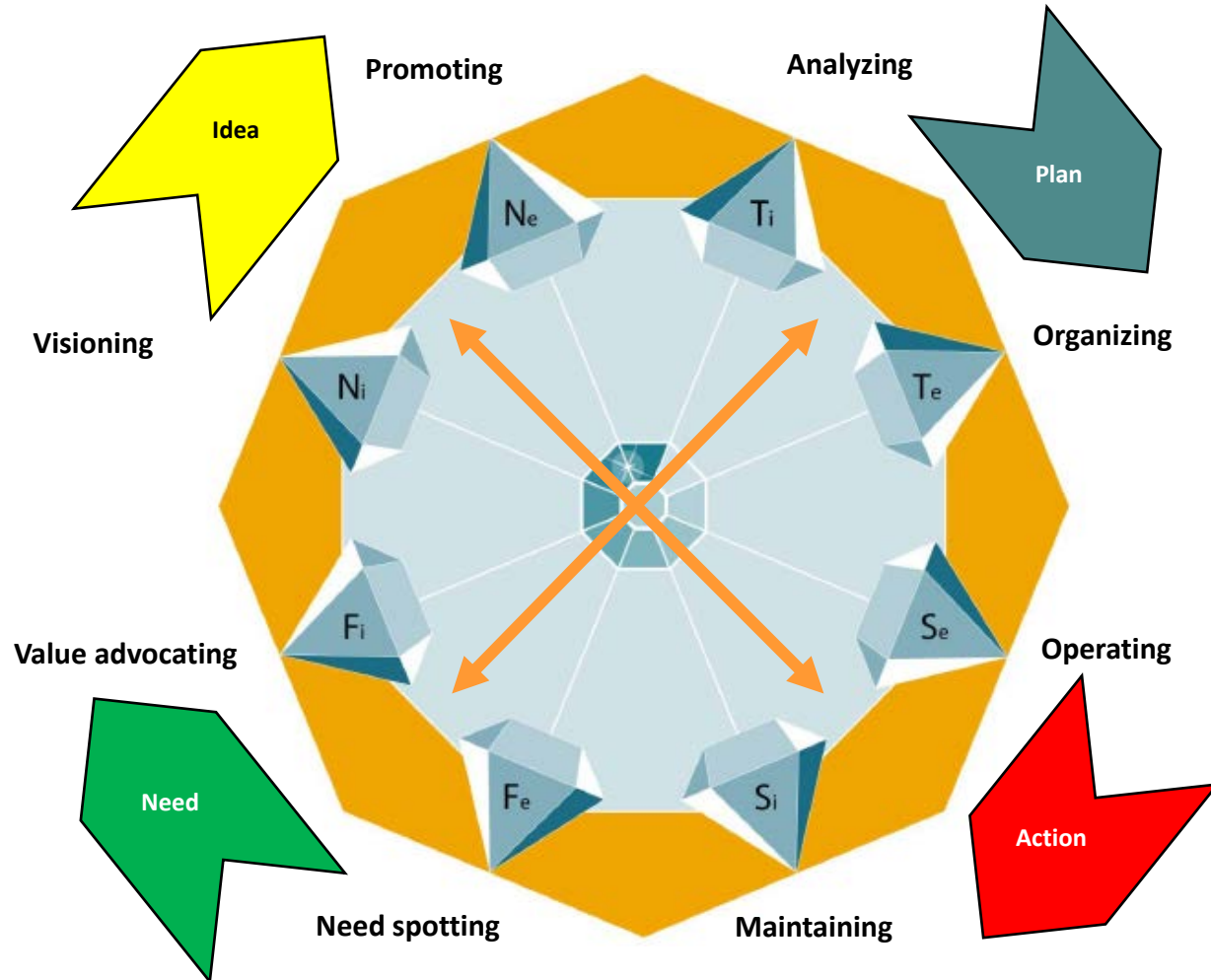
Source: Broegger, B. & Bohnsen, L. (2015), *The TeamDiamond®: Team Building using Jungian Typology*, Broegger Organizational Psychologists, Aarhus, p. 15

8 tactic work processes

- **The need process**
 - Need spotting
 - Value advocating
- **The idea generation process**
 - Visioning
 - Promoting
- **The planning process**
 - Analyzing
 - Organizing
- **The implementation process**
 - Operating
 - Maintaining



The DiamondChain® and the 8 tactic work processes



Source: Broegger, B. & Bohnsen, L. (2015), *The TeamDiamond®: Team Building using Jungian Typology*, Broegger Organizational Psychologists, Aarhus, p. 15

8 functional orientations

- **4 perceiving functions:**

- Se, extravert Sensing
- Si, introvert Sensing
- Ne, extravert Intuition
- Ni, introvert Intuition

- **4 judging functions:**

- Te, extravert Thinking
- Ti, introvert Thinking
- Fe, extravert Feeling
- Fi, introvert Feeling



The Need Spotter (Fe)



- Seek harmony in the team.
- Listen to teams or customer's needs.
- Strive towards all should feel comfortable.
- Uncover the teams or the customer's expectations.
- Gather information by listening and ask: What do you/we need? How can we help?
- Pour oil on trouble waters and seeks to find common grounds.
- Ask how the other team members well- being.



The Value Advocate (Fi)



- Identify important values.
- Apply gut feeling to accept and reject something.
- Awareness of and defends of individual team members (Whistle-Blowing).
- How do we handle a task/customer that is in conflict with our values and ethics?
- Which ethical/value-based requirements should we raise towards the task/customer?
- Which values has high priority in solving the task? For us and for the customer?
- Based on the identified needs what is then important for us now?



The Prophet(Ni)



- Develop scenarios for how they would like things to take place.
- Is concerned with what the future will bring.
- Invent original visions and strategies
- "What is the overall purpose with the task?"
- Is able to get the most impossible to look possible.
- Put tasks into meaningful connections.
- Use time to point out pitfalls in tasks and projects.



The Promoter (Ne)



- Inspire others and convince them about the visions.
- Develop new ways by constantly looking at possibilities.
- Creates external networks and allies.
- "We could do it in this way, or what about trying to ..."
- Seeks to get acceptance of ideas by others.
- Can be provocative with different and oblique approaches.
- Create creative processes and involve others.



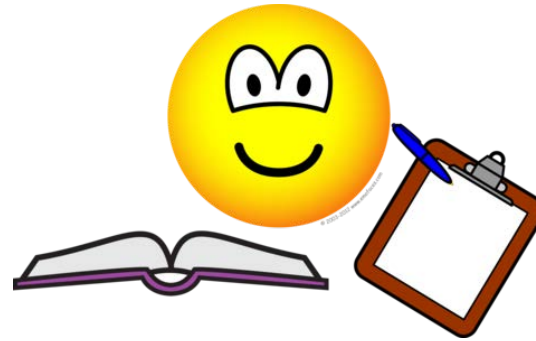
The Analyst (Ti)



- Is critical towards the task.
- Address the task, the result, the rationale, and the precision.
- Analyze in a logic way what speak against and for it.
- Raise questions regarding processes and methods: "Why should we do it in this way?"
- Get the team to stop up and reflect.
- Challenge, provoke and anatomize solution proposals and decisions.
- Proposals, ideas, and tasks should link logically together to be accepted.



The organizer (Te)



- Structure, organize and initiate.
- Make fast decisions, sets goals and subsidiary goals, define deadlines, divide roles and tasks.
- Establish procedures that all must follow.
- “Now, we have talked enough, we have to do like this”.
- Put pressure to act, demands initiative and effectiveness.
- “How much time do we have?”, “Which resources are available?”, “What are our objectives?”.
- Make decisions about how people and resources must be organized.



The Operator (Se)



- Acts and get things done: “Where should we start?”
- Acquire the necessary material and practical deals.
- Ensure that wild and light ideas become concrete facts.
- Has focus on that decisions lead to concrete actions.
- Ensure that daily and practical tasks are being carried out.
- Ask to the realism of the task: “How can the task be solved?”
- Solve practical obstacles.
- Relate concrete and practical to the task: “Have all been told?”



The Maintainer (Si)



- Ensure continuity of procedures and methods.
- Troubleshooting and quality assurance through with due care.
- Follow tasks to the end and keep deadlines.
- Hold on the things functionality: "What worked? What worked not?"
- Adjust, optimize and bring details to perfect.
- Focus on documentation, maintenance, and follow-up.
- Contribute with experience from past projects.



Team Role Overview

Team Role	Functional orientation	Characteristics	Blind spot
The Need Spotter	Fe	Establish social contact, build harmonic relationships, identify urgent needs and information.	Lack of focus on making up one's critical mind, for and against arguments in connection with cases and relationships.
The Value Advocate	Fi	Awareness on values and ethics; fight for social justice and support.	Lack of focus on objectivity in decision processes including external control and structure.
The Prophet	Ni	Visionary, see opportunities early; scenario builder.	Lack of focus on testing actual realities and actions.
The Promoter	Ne	Inspire and sell ideas, brain stormer, change agent.	Lack of focus on an application of past experiences.
The Analyst	Ti	Problematize and challenger, analyze logically, clarify and define.	Lack of focus on understanding and immediate accept of relationship harmony and what is felt.
The Organizer	Te	Structure and plan, make decisions and manage.	Lack of focus on values, ethics and human consequences.
The Operator	Se	Get things done, realistic and practical, tactical, fast and immediate reaction.	Lack of focus on long-term strategy and future.
The Maintainer	Si	Creates continuity, experience based, care with details.	Lack of focus on new possibilities and alternative ways of thinking.

Source: Broegger, B. & Bohnsen, L. (2015), *The TeamDiamond®: Team Building using Jungian Typology*, Broegger Organizational Psychologists, Aarhus, p. 40

Balance in the S&OP team

- Qualitative balance assumes that fundamental and opposite qualities are represented in the team.
- The qualities should not only be formal but also be expressed.
- The 4 strategic core processes should be represented in the team in terms of related team roles.

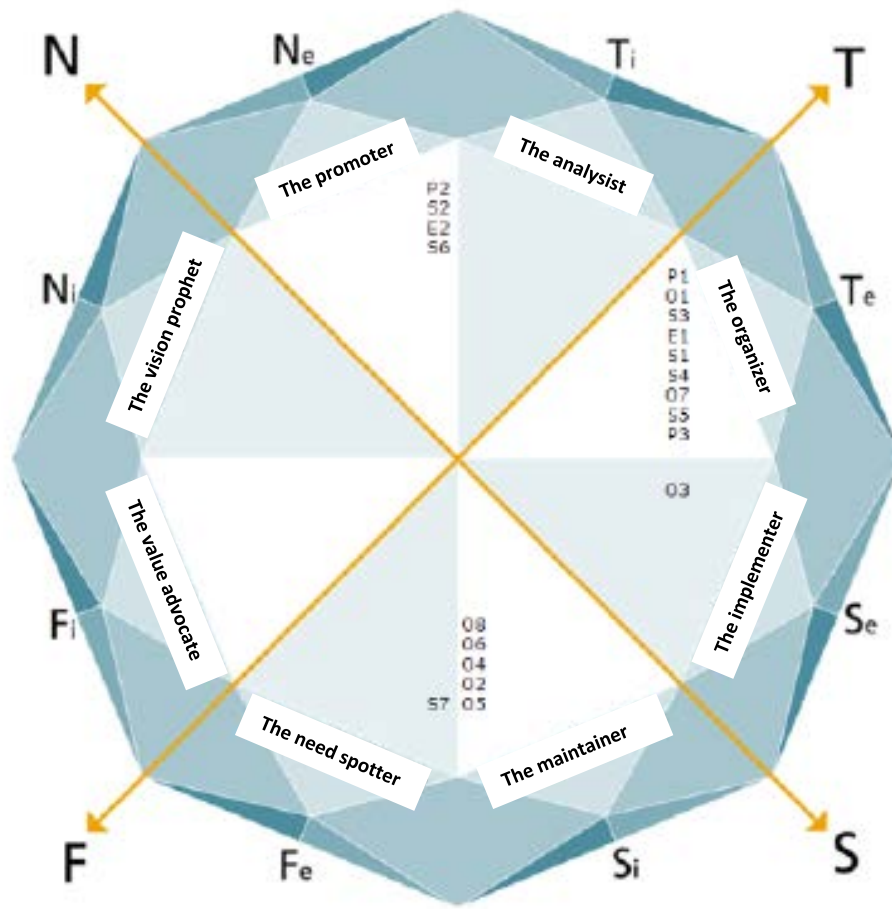


Strategies of action

- **Avoid weaknesses**
 - With planning the team can avoid lacking specific competences.
- **Compensate for weaknesses**
 - With a consciousness on weaknesses the team can try fill gaps.
 - The team can ad hoc draw on outside resources from the organization or outside the organization.
 - The team can reorganize by replacing members.
 - The team can try to recruit new members outside the organization.
- **Develop new strengths**
 - The team may be engaged in formal and informal “on the job” developments activities and change existing routines and seize new challenges.
 - The team members can consciously work on mastering opposite preferences.
- **Utilize existing strengths**
 - The team may keep, cultivate and strengths existing resources so they can be further optimized.
 - This can take place by better harmonize the roles and skills of the team members.



Example of team composing



Over-represented by:

- Organizers
- Maintainers

Under-represented by:

- Need Spotters
 - Value Advocates
 - Prophets
 - Analysts
 - Operators
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- Increased consciousness on the lack of roles.
 - Focus on who has secondary roles that can compensate.