



• Leadership • Productivity • Real Life



# Co-creative Team Performance Assessment

How to host an (online) meeting for  
building solutions together

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## introduction

# What is the purpose of this tool?

Help your team consolidate and integrate their learning and find solutions together

Use it when a cycle is completed. It can be a project, a year or a milestone.

Teams don't usually make these reviews on their own and each one might have a different perspective about the outcomes. So I created this tool for the ending stage, based on the HPTC system (figure 1).

By making this assessment together, you will be **leveraging collective intelligence** towards team's productivity and constant improvement.

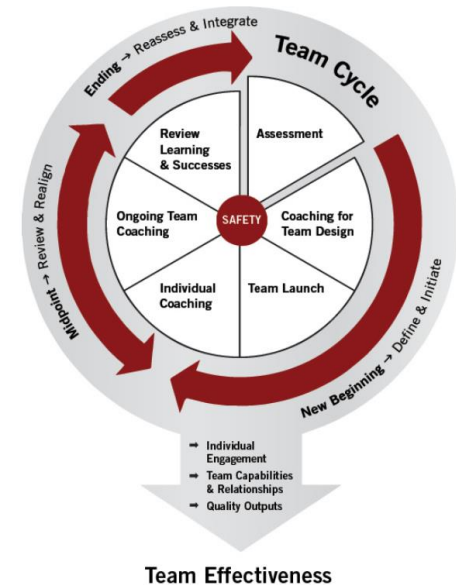


Figure 1: Overview of the High Performance Team Coaching System © Peters and Carr, 2013

# Leading for high performance

### This is not a feedback tool

If you want your team to grow and be more productive, they must learn together.

Remember the last time you took part on a feedback meeting. Usually it is a tense situation and people get ready to explain and justify their behaviors and outcomes. This is not an appropriate environment for learning, because people are closed to listening and more worried about defending themselves.

### Leadership for the Digital World

Foster a Culture of Lifelong Learning and shared responsibility

According to the WEF Report\*, Shaping People Strategy on the 4 Industrial Revolution,

*"leaders should display behaviors that highlight the importance of learning, intellectual curiosity and taking responsibility for one's own learning journey".*

This is exactly our goal by choosing to focus on learning and improvement.

# Benefits of using this tool

### Improve Productivity

Focusing on positive ways of looking at the outcomes creates confidence and willingness to excel as a team

### Focus on Solutions

This tool focus on learning, so it is a way to think collectively on the best solutions for the most important team outcomes

### Improve Communication

Create a safe environment for expressions and the team will learn how to better communicate with clients and all the stakeholders.

### Leverage Creativity

Creative ideas only blossom in non stressful environments. Give the team a chance to look at their work with an open mind.

### Emotional Intelligence

You will see how much your team will grow on empathy and self-awareness towards clients and themselves

### Responsibility ownership

When you let the team analyze their work they are more willing to do better, than if you do that for them.

### Increase Teamwork

You will see how united your team will get once they realize how they are better together.

### Collective Intelligence

You will leverage collective intelligence and create a learning environment for professional growth.

# Team Assessment

## Tool Guide

Here you will learn how to conduct the meeting for reviewing lessons learnt and achievements

# Instruction for Leaders

## Be the orchestrator not the commander

### Practice your listening skills

As a leader you must understand that your statements are taken as expectations and that some people might not speak their minds if their opinions are different from yours.

So, you must **be the last to speak** in each part of the exercise, except the self-assessment and closing questions.

## Adapt to your reality

### No team is the same.

If you have a small group, just skip the small groups formation.

If you think the group is close and informal and can contribute with more personal matters you can add more informality to your speech and ask them to talk a little bit freely about how the year (the cycle) was to each one of them.

## invitation

# Get the team on the right mood



### State the purpose

Let them know what is the meeting about.

Make it clear it is not an evaluation, but a learning session where you will be able to close this cycle and review the lessons learnt and team's achievements.

This will warm-up the team for the activities.



### Invitation text

Should be engaging and motivational.

Less formal than the regular emails you send them.

They must feel it is a safe space where they will be able to speak

Check the model on the tool kit section



### Settings

Especially if you re hosting a hybrid or remote team it is essential to let them know how the meeting will be.

Define the communication tool and make sure everyone will turn their cameras on.

The meeting should give priority to online practices, even for those at the office.



greetings

# Connect to the present

Explain the meeting purpose and create comfortable environment

Make sure the team is with you and disconnected for other issues and tools.

Say it is time to check all that was done in this cycle and get a collective perspective of the team's achievement, lessons learnt and work process.

Clearly state this is not an evaluation.

If you are hosting an all office meeting, arrange it to have coffee and cake. This helps set a comfortable environment.

Make it as informal and creative as possible.

Suggest a cup of coffee or tea to make it more comfortable



## self-assessment

# How do you feel about this [period]?



### Let it all out

Especially after troubled times, make sure they can get rid of what is making them anxious.

Ask each member to say how they felt about this cycle in a few words. You can give 1 min for each one to speak.

You can also ask them to write down and show at the same time or to send the digital post-it using the chat.

Display the answers in two columns: positive x negative feelings, and make a reflection about them.

**Point Out** the team's overall state of mind on this stage of the cycle. Be empathetic and don't judge.

Check on the template section how you can get the digital post-its and slide templates

# Assess tangible outcomes

## Focus on what really matters

List the topics you are going to review with the team.

You must have decided the topics in advance and now it's time to explain to the team what is going to be reviewed and the reason you chose these topics.

Focus on the most important ones. This is not an evaluation, but a way to understand how the team can work even better together. I recommend you don't choose too many topics, otherwise you will disperse the efforts instead of focusing on what matters. Usually up to 5 is a good number.

Include goals, process, behavior and client relations.

Avoid using the word *evaluate*. Use *review* instead



### Some Ideas:

- Client Communication
- Problem solving agility
- Productivity levels
- Creativity and innovation
- Team autonomy
- Infrastructure
- Teamwork
- Professional development
- Stress levels

# Look for strengths and learnings



## Assign groups and topics

Use breakout rooms and define the topics for each group to answer the questions below

Before sending to the groups, ask each one to reflect on the questions on their own for a minute.

1. What is different now comparing to the beginning of the cycle?
2. What did we talk about changing, but did not change? What will change this pattern?
3. What did you achieve together that you couldn't have achieved alone?
4. What did you learn about yourself and about the team that makes you work better together?
5. What would the team look like if it were a novel, a film, a metaphor or a song (for creative groups)

## group reflection — activity 2

# Put all minds together

Get all the group in the same room again.

Now it is time to reflect together about all the topics listed

Go through each group and take notes about the answers they gave to each question. You might want to use an online board and share the screen with your team or a mind map tool. After that, you may open for everyone to contribute with all the topics.

Encourage everyone to speak their minds.

Check for:

**Patterns:** what they most focus on? Behavior, process, quality, goals, project?

**Responsibility locus:** does the team get involved in solutions or expect the leader to solve everything?

**Learning level:** can they see what they have to improve?

You may ask them to grade each topic for the beginning and the end of the cycle

## group reflection — activity 2

# Put all minds together

### Get everyone to talk

Now you need to make sure everyone is heard.  
Get the whole group to analyze the chart.

Explain how the round goes and use **brainsteering** technique:

- Give time for everyone to think about the questions before you start.
- Use a robin style conversation to give each member a chance to speak
- Ensure everyone has the same time to contribute
- Say to people: "Even if you think you are being redundant say it on your own words."
- Give the same weight to everyone's comments. Just say thank you after each comment

### Reflect on this as a group

1. What can you add to the chart?
2. What topic was forgotten and should be added next time?
3. What patterns can we see by analyzing the chart?
4. What should be our main learning focus for the next cycle?
5. What can we see as the group strength that we must keep doing?

## group reflection chart

# Chart example

Reflection	Client relations	Innovation	Team work
What is different now comparing to the beginning of the cycle?			
What did we talk about changing, but did not change? What will change this pattern?			
What did you achieve together that you couldn't have achieved alone?			
What did you learn about yourself and about the team that makes you work better together?			

closing

# Think, feel and do

## Don't lose the momentum

Make sure everyone takes the lesson learnt to themselves.

Ask each member of the group to answer in few words these three questions.

Your aim is to make them own and integrate what they have reflected together by activating their thought, emotions and will.

You may start to set an example.



What did you learn today?



How do you feel about the teams perspectives now?



What will you start doing now to get ready for the next cycle?



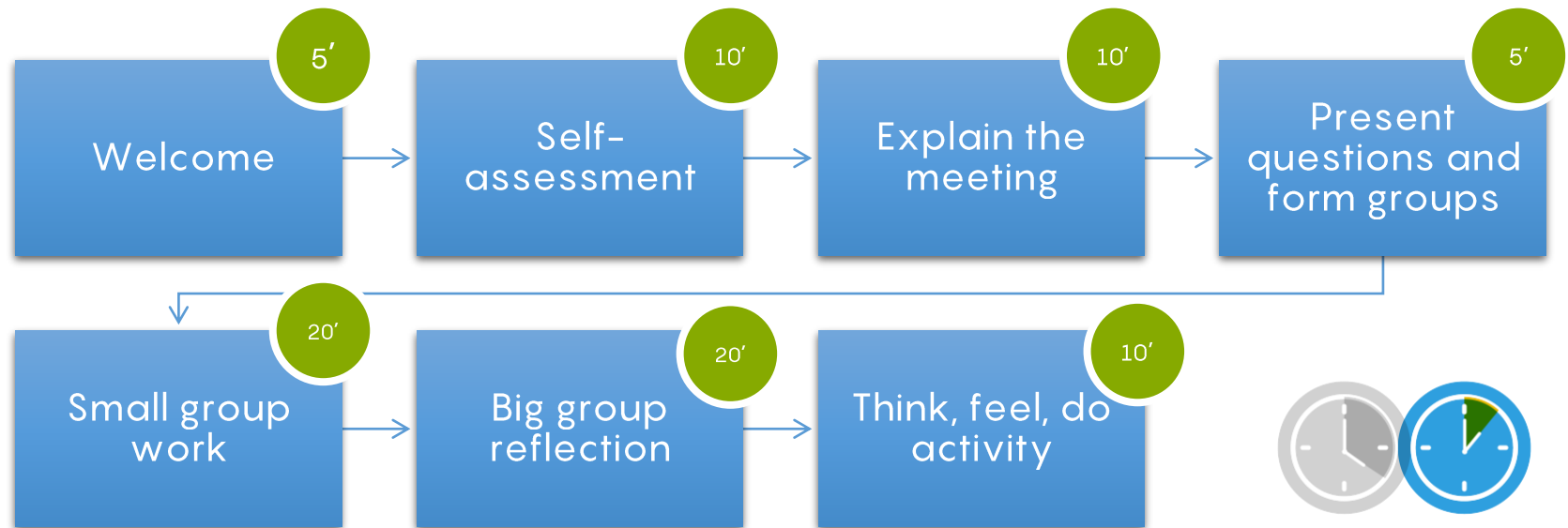
# Step-by- step

## Get ready

Here you will find each step for you meeting and also useful tips to make it a success.

## meeting overview

# Get organized



## tips

# If you have a remote or hybrid team

## Think remote practices first

On hybrid teams those who are working remotely might feel excluded.

Even if only one person is working remotely use online practices. **For those who are on the office, ask them to connect using their computers and not on a meeting room.** You want to listen well and see everyone's faces, expressions and make sure they all get the same attention.

Remind everyone to turn their cameras on and only activate the microphone when they want to speak.

Before the meeting check your connection and see that you know how to use breakout room and other tools you chose.



Make inclusion a priority

## tips

# Make sure everyone speaks

## Encourage the shy ones

Some people might act as the group speaker, but often they only speak their minds.

If you know well your team, you must know the ones that love to speak their minds and the ones that hardly ever say anything.

Ask for the shy ones to begin speaking and if you have a lot of introverts in your team, start setting an example on the greetings and closing activities.

Make the group aware of this when you divide them in small groups and try to put together the shy ones in one group. Dominant people might not have the self-control to let others speak.

## Emotional Intelligence

Create awareness of team communication.

By encouraging the shy ones to speak first you'll be helping them develop their communication, as well as helping the extroverted talkative ones to listen and be more patient.

They will feel they are already working on their skills as a team.

tips

# Get prepared

## Get the topics and questions ready

### Preparation makes confidence.

Think about all the stakeholders involved with the team and collect what is actually most important to reflect upon on this stage.

You can even talk to clients (internal or external), your own leader, suppliers and even with the team to collect this information.

Only take to the meeting the most important topics. The ones you think can lead to team's growth.

Include questions that you consider important, as long as they are meant to highlight learning and achievements. Focus on the future, on [feedforward](#). It is not time to give feedbacks.



tips

# After the meeting

## Reflect about your expectations

Think about how you expected the meeting to go and how it actually went

This is a good opportunity for you to check on your leadership skills.

You might find useful to ask yourself:

- How do I feel about my performance?
- Did I make everyone comfortable?
- Did I create a learning environment, or did it look like an evaluation?
- What will I change for the next time?
- Did something or someone surprised me?
- What did I learn about my team?



# Tool Kit

## Adapt and use

Check the tool kit I prepared for you.

Slides, models, digital post-its. All you need to get set.

Get in contact and I will send it to you

your tool kit

# Save time and get ready



## Time saving

I know you have little time and also wants to do your best. So, as a coach I usually help leaders not only by guiding them through the best practices, but also by providing the tools to accomplish their goals.



## Editable material

All the material I will give you is editable.

You can alter content and adapt to your company's culture and visual identity.

Make it your own.



## Visualize ideas

The purpose of this kit is to help you and your team visualize ideas.

Visually articulated concepts reduce the time to reach consensus.

You will also show your team the effort you put into them.



## Spread

Share this material with other leaders and get their feedbacks on their meetings.

Create a group of leadership peer mentoring to share outcomes and solutions

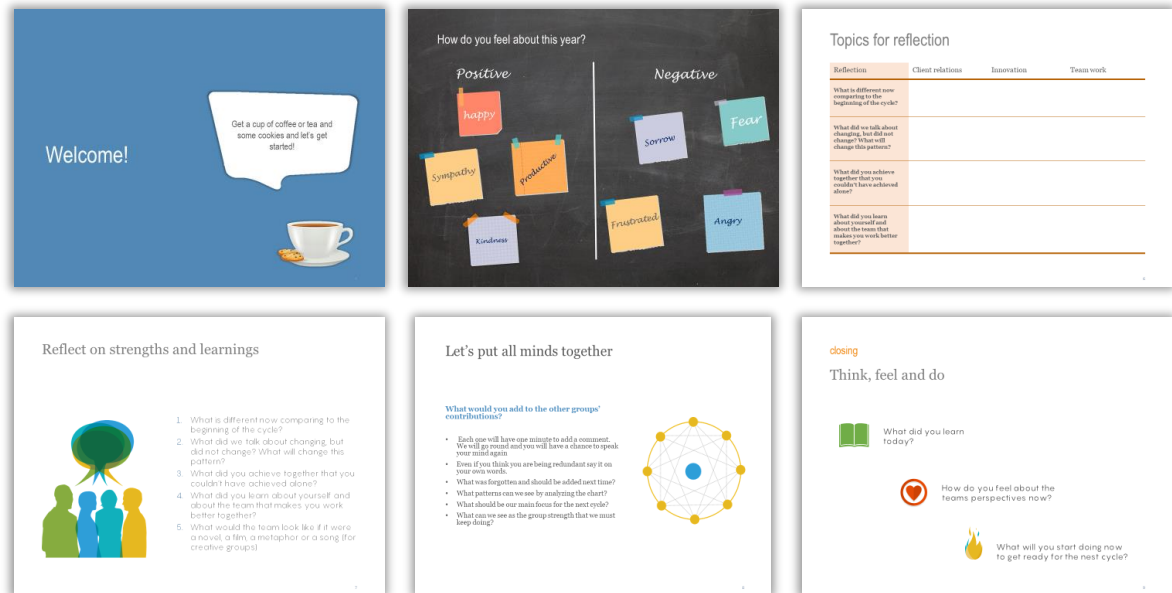


your tool kit

# All the slides you need

In order to create a comfortable and creative environment a good slide show may be very helpful. I want your meeting to increase creativity and participation and also to give you tips for hosting it.

All slides are  
editable so you  
can adjust the  
content and align  
with your  
company's visual  
identity and style.



## section 04

your tool kit

# Other helpful tools

Online meetings can be tricky when it comes to encouraging creativity and participation levels. I can also help you with that.



## Digital post-its

Send post-its in many colors for your team to choose and use in the self-assessment and closing activities.



## Invitation model

Fill in the blanks and send an invitation that will create the right mood and get your team looking forward for the meeting.



## Q&A

Get access to the questions about this tool and be prepared for most common obstacles you might face for encouraging participation.

# thank you

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# Engaging with Palombini

Contact me and get  
your tool kit!

Real life solutions for real leadership problems



I'd love to help you!



## Consulting

I can help you guide your organization into the fourth industrial revolution. Assessing your company's needs and creating personalized solutions for People Strategy.



## Mentoring

In groups or individually I can help leaders to increase productivity, retain clients and talents. Learn through practice and get the support for the implementation and follow-up.



## Coaching

For executive or teams. This approach will help them to become more goal oriented and define unique strategies to get results and develop emotional intelligence.



## Programs and workshops

The best of all worlds. These are personalized programs that use strategies of coaching, mentoring, and co-creative techniques with its focus being on improving KPIs..

# About Carolina Palombini

I am a Psychologist, working with people development for over 20 years.

I have been an executive in many multinational companies and after all this time I have helped dozens of executive, leaders and teams to be more productive, leveraging emotional intelligence and creating a more creative and agile environment.

**I believe in real life solutions for real leadership problems.**

As a consultant and coach I realized that the best way to achieve results is not by content based trainings, but by getting into real problems and finding solutions that can be applied to the teams' and executive's routines.

That is why I like to create my own tool to help my clients, according to their company's culture and personality type.

I love my job, and my greatest satisfaction comes from the feedbacks and recommendations I receive. (check them on my [LinkedIn page](#))

That's how I realize I'm on my way, fulfilling my purpose.



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