Collaboration means different things to different people, and personal factors also affect how creative groups collaborate. It's important to establish, from the outset, not just what will be accomplished, but how.

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Calibrate Before You Collaborate: Five Questions to Guide Group Work

by Alex M. Dunne and Tonya M. Peck

It's Monday morning and you've invited your team into the large conference room for the kickoff meeting of a new design project. Whether you work in a corporate environment driven by time-to-market pressure or in an agency environment driven by clients, kickoff meetings follow a common pattern. You outline the project and the creative opportunity. The account manager or project lead talks about timelines and budget. If there's an executive present, she motivates the troops about the significance of the work to the company or the client. Everyone says the word *collaborate* at least once.

But in the rush to exit the conference room and start the work, a few false assumptions can easily occur. Some team members may hear repeated use of the word *collaboration* as an actual agreement to collaborate. Others may assume that everyone will collaborate in the same way, regardless of the cognitive, perceptual, behavioral, and creative diversity in the team. And others still may hear "Let's collaborate on this…" as an invitation to shared decision-making. But collaboration is a creative process, not a decision-making method. And these assumptions can solidify into a set of

unexpressed expectations for how the work will get done.

The calibration briefing

In 2008, in an article in this journal,[1] Julian Jenkins suggested convening an "intention workshop" at the start of every design initiative "to create a shared view of the problem," "to agree on the desired outcome," and to establish "a strong sense of engagement and common ownership" for the work ahead. We endorse this approach wholeheartedly. Business factors such

composite emotional intelligence, and everyone's relative comfort level with tension and conflict. For these reasons, we believe it is imperative that teams get clear at the outset not just on what will be done, but on how.

To do this, we suggest creative leaders and design managers convene a calibration briefing with their team. This facilitated discussion explores a sequence of questions about decision-making, the limits of ideation, and the experience team members wish to have working with each other. Here

sarily consensus. In fact, expect some disagreement about the answers. But talking openly about these questions enables each person to actively acknowledge up front where and when he or she may have to accede to a decision of the group or the leader. We also recommend capturing the output of the conversation into a one-page calibration brief for future reference (for an example, see page 19).

Now, let's take a closer look at some of these questions.

Business factors such as time and money always affect what gets done, so it's useful to clarify the vision, scope, and parameters of the work up front, typically captured in a creative brief.

as time and money always affect what gets done, so it's useful to clarify the vision, scope, and parameters of the work up front, typically captured in a creative brief. In our work managing and consulting to teams, we find that personal factors also directly affect how creative groups collaborate. These factors include the leader's tolerance for risk, the ambitions of individual team members, the team's

are the questions we suggest:

+ Do we have a clear vision and a single leader?
+ Where are we in the process?
+ How far do we hope to go creatively?
+ How might we best manage collaboration and conflict?
+ What kind of team do we wish to become through this work?

The facilitator's goal for the calibration briefing is clarity around the answers to these questions, not neces-

Do we have a clear vision and a single leader?

These two items are the biggest pieces of the puzzle required to start any creative initiative. In the agency world, the identity of the leader may be clear. It's the creative director of the firm or the senior designer staffed on the project. The leader's identity may be less clear in the heavily-matrixed world of corporate teams, where members may work for different bosses. A project without a single leader leaves the group open to the risk of collaboration creep, where the team's creative process drifts into consensus or democratic decision-making without anyone noticing it. The presence of a vision, whether inherited from previous work, another team, or the previous leader, must

1. Julian Jenkins, "Creating the Right Environment for Design," *Design Management Review*, vol. 19, no. 3 (Summer 2008).

also be verified. This compound question therefore has four possible answers, each requiring a different response (Figure 1).

All four of these responses require validation and verification by the group, especially if opinions differ on which best describes the current team and project. For example, in case #1, a design effort with a leader but no vision, the leader must decide which decision-making style will be used to set the group's vision. The leader may create the vision herself and autocratically set it for the group. Alternatively, she may use a collective style, engaging the group's collaborative process to

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generate a range of visions from which she alone then chooses. A third possibility is that the leader may rely on the democratic or consensus decision-making styles by asking the group to choose its own vision. We caution against this last path unless the leader is clear why the democratic or consensus styles make sense. It's important the leader doesn't do so just to hide her indecisiveness.

As long as the leader is transparent in her decision-making, any of these approaches to vision-setting can be

effective, even the autocratic path. Since this first step establishes the tone and expectations for decision-making, it's critical that everyone is clear on the leader's identity, as well as on the group's vision and how it was set.

Where are we in the process?

This next layer of calibration helps the team locate the nature of their work in the context of a larger project lifecycle. For this, we have turned to Min Basadur of Basadur Applied Creativity, who developed an 8-step model for creative problem-solving. The model consists of the following sequential phases (the phases are Basadur's; the definitions are ours):

Phase 1: Problem formation. The group undertakes a search for the right language, paradigms, models, and data to describe the problem or opportunity targeted in later phases.

Phase 2: Solution formulation. The group explores possible solutions to the problem or opportunity within the space bounded by the defining language, paradigms, and models of the previous phase.

Phase 3: Solution implementation. The group designs in detail,

		No	Yes
Single Leader?	**Yes**	**1.** The leader should first decide & vocalize what decision–making style will be used to set the group's vision	**2.** The leader should first check that the team shares the vision, and indicate where within it they can ideate.
	No	**3.** A leader must be found for the effort immediately before any further steps can occur.	**4.** A leader willing to carry out a vision they didn't create must be found immediately before any further steps can occur.
		Clear Vision?	

Figure 1. Do we have a clear vision and a single leader? A project without a single leader leaves the group open to the risk of collaboration creep. The presence of a vision, whether inherited from previous work, another team, or the previous leader, must also be verified. This compound question therefore has four possible answers, each requiring a different response.

builds, and releases the solution previously chosen, including meaningful feedback mechanisms to ensure it works as intended.

Every design project spans two or three of these phases. A green-field architecture project or new product exploration might start in Phase 1. Campaign and product iterations, or design initiatives with significant research precursors, might start in Phase 2 or 3. Again, the intention is for the group to orient itself to the work. If your group combines a mix of existing and new team members, this is especially helpful in that it allows everyone to understand that "we are now in Phase x." Parts of the work may be in different development phases, but the overall epicenter of the project should be agreed upon.

The value of this conversation increases when it is combined with the next question.

How far do we hope to go creatively?
Ambition is the fuel that keeps your team going. Knowing how much of it you collectively have can affect what you're able to achieve. We suggest asking individual team members to honestly express their level of ambition toward the new project by using one of the following defined expres-

sions to complete the phrase "I am out to…":

- "…Fix a problem" (reconcile incongruences in systems or experiences that already exist)
- "…Make something new" (produce a best-in-class integrated solution for an existing category)
- "…Change the world" (disrupt whole paradigms with a breakthrough, category-defining new experience)

Again, the facilitator should aim for clarity in the group, not consensus. Expect and welcome variations among individual answers. A senior designer fatigued from just finishing a world-changing project may wish to simply fix a problem in his current

work. Consider your own answer carefully, but be honest when you share it. It's easier to maintain your true ambition level over time than to sustain one that is artificially inflated.

Once you've identified individuals' ambitions toward the work, we recommend combining everyone's answers with the phase of the work determined in the previous question. You can merge them into an X/Y grid, as shown in Figure 2.

A new junior team member out to change the world may find his ambition well-matched to the problem formation phase of the work. If his ambition remains high in later phases, he may expect increased responsibilities if he is to stay engaged. To manage this in your own team, we
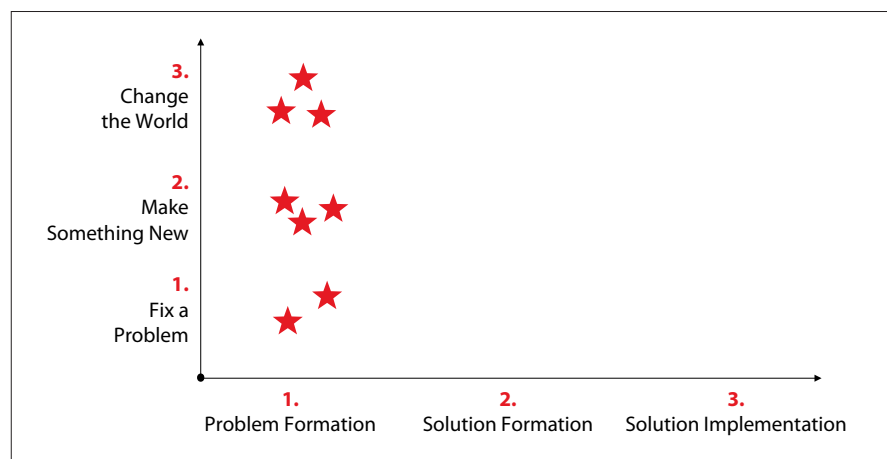

Figure 2. Knowing how much ambition you collectively have can affect what you're able to achieve. In this example, a team of eight people marked a range of ambition levels for their project during its problem formation phase. Doing so enabled them to explore the influence their varying ambitions might have on how they collaborate.

A Sample Calibration Brief

This is a living document produced by the Project EasyGadget team to reflect our shared understanding of key aspects of how we'll work together on Phase 2.

Leader / Vision

Paola T. (creative director) replaces the leader from Phase 1 and, going forward, will be the single point-of-accountability and leader for this project. She'll decide when finished work will be shown to the client, but will consult the team around presenting work-in-progress, recruiting, and hiring decisions. Team leads will drive collaboration cycles, in which she'll participate as a member, not as leader.

We'll draw our vision directly from that defined in Easy Gadget Phase 1: Vision and 7 Key Scenarios.

Where are we in the process?

Based on the work completed in the previous project, Easy Gadget Phase 1: Vision and 7 Key Scenarios, our current work will explore possible design approaches for the seven key scenarios (solution formulation), and will ultimately yield the design direction, language, user-experience guidelines (not yet a spec), and technical recommendation required for Phase 3 work to begin.

How far do we hope to go creatively?

Our vision (from Phase 1) spans common user scenarios addressed by the competition, as well as new scenarios we believe would be innovative, to include in the same user experience/device. We aim, therefore, to "create something new" in addressing the common scenarios, but also to "change the world" by supporting these additional as-yet-unexplored scenarios.

How might we best manage collaboration and conflict?

In service of the divergent, exploratory nature of this current phase of work, we agree on the need to emphasize certain creativity-friendly behaviors. Therefore, regardless of our level, experience, or discipline, we will practice and hold each other accountable to the following healthy communication skills:

1. Respond to all ideas with "Yes, and…" instead of "No…"
2. Critique, edit, and worry about implementation LATER.
3. Use direct address, "I" statements, and real-time behaviorally specific feedback to parse and understand our experiences working together.
4. Seek/assume "the most respectful intention" when someone's behavior confuses us.
5. Be vigilant of attempts at "triangulation," and deflect those overtures to the person involved.
6. Learn, and then tell, the other person's story before resolving conflict.

What kind of team do we wish to become through this work?

We wish to become more resilient as a team so that we can better endure the heat and passion of our work, without the burn. We wish to integrate a new leader (Paola) and other new members, and be known as a team that got stronger by learning from the group challenges we faced in Phase 1 (instead of disbanding to repeat those challenges in other teams). We also want the client to choose us as a team, not just our company, for Phase 3. ■

recommend inviting everyone to share his and her hunches about how the distribution of ambition might affect the work over time. Good open-ended questions to explore include, "How might this help or hinder us?" and "How might we sustain our ambitions over the course of the project?" When led effectively, this conversation helps everyone attune his and her creative ambitions to each other and the work. In your own team, should your ambition be lower than that of others in your team, you might explore how much the team can risk creatively and how much you'll protect them while they do so. Also be aware that everyone's ambition, yours included, will vary over time. For this reason, we recommend updating the X/Y grid as the work transitions from one phase to the next.

How might we best manage collaboration and conflict?

Conflict is an inherent part of any group experience, and it can be an effective ingredient in the creative process. But not all team members or groups are skilled at navigating it. A DMI "News and Views" article last year[2] described a common creative

conflict and asked several key questions:

"…have you been trained to handle an experience like this? Do you and your colleagues around the table have a common language and skill set for pausing and parsing this experience in the moment? Are you able to detect, differentiate, and articulate the thoughts in your mind from the feelings in your

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body? Can you sense the reptilian urge within yourself to fight or flee while at the same time feel sufficient empathy for and curiosity about your colleagues? In short, do you have what it takes to direct this potential conflict into an opportunity for collaboration and learning? And, to raise the stakes even higher, could you do so if these colleagues were not internal colleagues, but clients instead?"

As more design teams collaborate and manage conflict across disciplines and cultures, their ability to do so effectively becomes a critical function. We encourage teams to calibrate around this question by identifying specific behaviors they can practice, such as "start with appreciation for

the work" or "address conflict directly with the person, not with others." The facilitator's objective should be a list of 10 behaviors the team can adopt as ground rules or norms for healthy collaboration and conflict. We typically generate these norms via an experiential activity like an affinity exercise or brainstorming so that individuals can quickly offer wisdom from their past project experiences. And what more congruent way to elicit effective collaboration and conflict behaviors than with a collaborative exercise?

As the design leader, we recommend you bring a few behavioral ideas of your own to establish your new team's culture. Like the ambition-versus-impact X/Y grid, the list becomes a meaningful artifact to post and refer to later, when collaboration intensifies.

What kind of team do we wish to become through this work?

All groups do two things simultaneously: They perform the work at hand, and they become a different group than the one they began as. For design teams, the process for doing both effectively requires many of the same skills—empathy, curiosity, compassion, unconditional positive regard for your subject, and

2. Tonya M. Peck, "Integrative Thinking, Feeling, and Being," *Design Management News & Views*, (September 2010).

risk-taking. As design leaders, we therefore have a unique opportunity to invite our teams to make how we work congruent with what we do. If your design goal is an emotionally resonant experience or product, then the members of your design team need to resonate emotionally with one another. Ask them, therefore, not just to imagine possible futures for a product category, interaction model, or user group, but to do so for the team itself. We suggest aiming for one of the following incremental possible futures for your team:

An effective team: "We delivered the creative brief within the time and budget allowed."

A high-performance team: "We delivered the creative brief while actively developing each other's mastery of what we did and how we did it."

A repeatable team: "We delivered the creative brief, increased our mastery, and wish to work together again."

Conclusion

We've offered here what we believe are the minimum basic questions required for a mixed-discipline creative team to calibrate how they will work together. And as the work unfolds, we recommend checking in from

time to time with your team to see how well their experience hews to the calibration brief you created together at the outset.

As the design leader, should you decide to facilitate these sessions yourself, be aware that the innate power, rank, and status of your role in the group may affect individuals' willingness to be open with you. We therefore recommend approaching this as you would user research, and bring all the same empathy, curiosity, and compassion to your dual role.

And just as any good designer checks if his or her solution met the needs of clients and users, we suggest leaders hold a calibration debrief at project's end to solicit team feedback. Use the same five questions in retrospect, with one key addition:

Would you work on this team under this leader again?

Expect answers as diverse as in any user research. We can think of no better way to model the empathy, curiosity, compassion, and risk-taking you expect of your team than to invite them to explore these questions openly with you.

We firmly believe that strong teams build strong products. We also believe that design and creative groups, by virtue of the collaborative skills they demand, are particularly suited to experimenting with the calibration briefing method.

We wish you well in doing so, and welcome any feedback you'd care to share on how these ideas worked for you. ∎   Reprint #12231DUN14

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