Team Roles + Descriptions

You've already seen how normal functional groups can be viewed through the lens of customer experience. However, defining team roles for your customer experience projects is just as crucial for success. Teams work best if you **start small** – somewhere between two to five active members, with an ideal group size of three or four. This allows work to be divided and for everyone to stay purposefully engaged. If there are more interested parties you may form a larger, secondary group to tap into for workshops, feedback, and general support. If possible, **seek diversity** on your team – of experience, gender, point of view, and function areas. This will help you avoid the challenge of "group think" – becoming an echo chamber of homogeneous thoughts, and implicitly help your team integrate into the larger organization. Each team should include the following perspectives: consumer mindset, operational savvy, financial expertise, and organizational evangelists. Once you've rallied your team, you're ready to discuss roles, goals, and routines.

SUGGESTED TIME
1.5-3 hours

ROLES
2-4 collaborators

MATERIALS NEEDED
template, page 55
pens
paper
sticky notes

STEPS

1
DECIDE OPERATIONAL ROLES
Provide clarity to your team by determining roles. There are generally a few types:
• *Team leader/co-leader* facilitates the process and keeps team accountable to goals
• *Coordinator* maintains shared calendar, schedules meetings, helps with logistics
• *Documenter* documents via written notes, pictures, etc. Organizes shared files, keeps track of data and work products
• *Operations* keeps track of budgets, time, potential alternative sources of funding

2
ORIENT TOWARD SHARED AND INDIVIDUAL GOALS
Create two zones on a wall: "group goals" and "personal goals." Take a moment to individually reflect on these two areas, writing one thought per sticky note and using as many as you need (generally 4-6). Review the wall as a group, discussing your perspectives and noticing areas of commonality or divergence. Prioritize main group goals to shape your work; record individual goals to revisit in the future.

3
ESTABLISH SHARED NORMS AND ROUTINES
As a group, decide on the frequency of team meetings and discuss what a successful meeting would look like. You may also choose to come to an agreement on the amount of time you'll focus on the project, communication norms, and collaboration tools. Sorting out small details and revisiting them in a transparent manner helps avoid needless team friction.

4
UNDERSTAND YOUR WORKING DISPOSITION
If you'd like to take the process one step further, facilitate discussion about how each team member may work best on a customer experience project, which often requires skills outside of everyday roles. Have each team member rate themselves on a scale of 1 to 5 (1 = highly unrepresentative, 5 = highly representative) on the following perspectives: Anthropologist, Experimenter, Storyteller, Analyst, Connector. Host a follow-up conversation on the ways you want to contribute to the project and hone your skills. (See page 54 for more detail on these perspectives and how they apply to your work.)

Tool 7
Team Roles + Descriptions (1/1)

DESCRIPTIONS OF WORKING DISPOSITIONS

Anthropologist: A curious inquirer who wants to find out how people tick and interact with each other, their environments, and their tools. You notice what others may not and approach qualitative understanding with rigor. You view people with an empathetic, open mind and seek inspiration from everyday human innovation.

Experimenter: A consummate builder who tests to learn. You aren't afraid to work through a problem in a rough state and would rather make decisions from evidence than theory. You don't need to have a hard design or technical discipline, but can often be seen drawing through ideas, making models, or talking through hypothetical situations to seek clarity.

Storyteller: A synthesizing mind with a knack for finding the storyline in the data points. You cut through jargon and find ways to translate work to a broader audience – identifying the challenge, plot, and characters. Your messages clearly convey innovations and can motivate the emotions and actions of a broader audience.

Analyst: A seeker of patterns in data. You find the story of human behavior in quantitative touchpoints to identify opportunities for impact. Your perspective helps find ways to measure creatively and model business value quickly. You're often the translator to operational or financial roles in your organization.

Connector: A gregarious socializer with a knack for cross-pollination. You bring in multiple perspectives from your own experience or network. This skill is crucial in the field to build rapport, form mutually beneficial partnerships, and build connections and support in your organization to spread the details of your customer experience work.

Reference: Tom Kelley – The Ten Faces of Innovation
Thoughts on leveraging multiple perspectives as you bring creativity, innovation, and customer perspectives into your organization.

GROUP GOALS What are your goals for this project and team? What would success look like?

PERSONAL GOALS What are your individual goals for this project? Is there a skill you'd like to gain or enhance? A professional milestone?

PROJECT PERSPECTIVES
Share the perspective and disposition you bring to your project team. This will help your team identify how to share work and leverage strengths.

How representative are you of each disposition?

	this is not me	1	2	3	4	5	this is me
ANTHROPOLOGIST							
EXPERIMENTER							
STORYTELLER							
ANALYST							
CONNECTOR							

What implications do your ratings have for your team role and responsibilities?