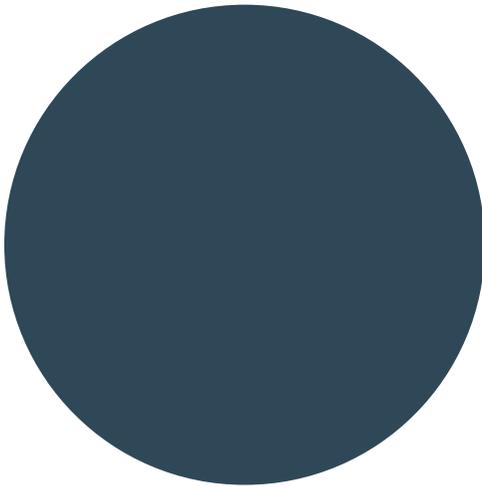# Help Yourself by Setting Up Team Members for Success

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Behind every successful executive is a great team

When you have a strong team set up for success, you're doing more than helping your team. You're helping set yourself up for success in the process.

First, find the right talent. Next, put the conditions in place for this talent to excel. Any time, energy, and attention invested will yield phenomenal returns.

What Team Members Need to Be Successful Over Time

Build Trust: Done right, a strong, trusting collaboration with your team can transform how you experience work and potentially life. It is an investment you won't regret..

Mutual Respect: Team members break your business. When executives understand, nurture, and develop these relationships, there is a ripple effect. How you treat your team, sets the standards for how others will treat your team. Both leaders and the organization as a whole, including clients, stand to gain when mutual respect is a foundation.

Decision-making Opportunities: Give your team the autonomy needed to make decisions. If your team is free to make smaller decisions, you'll have more bandwidth to make big decisions. Empower them to take the lead whenever possible. Overtime, you will be growing your talent pipeline. You might be surprised who eventually rises to the top.

Share Your Logic: Let your team in on how you are thinking about key decisions. They can help filter access and make sure you hear from the right stakeholders at the right time.

Training Opportunities: Teams members see it all; they are there to witness breakdowns in systems (i.e., what is no longer working or no longer working efficiently). As a result, they can play a vital role in identifying training opportunities. Listen to their advice. But don't stop there. Also, ask them where they see opportunities to streamline their work (and your work) by adopting new technologies, platforms, and systems.

Development Opportunities: Team members need to have opportunities to grow on the job over time and may crave opportunities to expand the scope of their role/contribution to the organization; check in with them regularly to find out what they need to thrive.

Ensure Your Team Is Set Up for Success

Once you've set your team up for success and set a tone of respect across the organization, start to drill down on the day-to-day details.

COMMUNICATION

1 **Clarify and prioritize alignment**

- [ ] Check in to ensure understanding
- [ ] Track successes to streamline future collaborations
- [ ] Remember that alignment is ongoing— align on a regular basis

2 **Decision making**

- [ ] Specify what decisions can be made by the team alone and when decisions should be calibrated
- [ ] Assess your level of comfort with autonomy

3 **Decide how to communicate**

- [ ] Indicate if you prefer emails, calls, texts, or prefer different modes of communication depending on the context
- [ ] Indicate your preferred mode of communication with your team members, employees, clients etc.?
- [ ] Specify how often you prefer to communicate (e.g., do you prefer to receive messages as they arrive or in bundles just a few times each day?)
- [ ] Use Captured to help facilitate communications
- [ ] Ask your team to let you know when a specific task has been completed so you can cross it off your own list
- [ ] Default to over-communicating with new members (as you get to know each other, you'll likely need to communicate much less—the best team members can intuit what you need and when)

FOUNDATIONS

1 **Clear expectations:**

- [ ] Always be clear about what by when
- [ ] Clearly state criteria for success
- [ ] Focus on outcomes
- [ ] Be available for questions (especially early on) to increase understanding and foster alignment
- [ ] More is less, as it reduces disconnect and confusion

2 **Schedule preferences**

- [ ] Indicate when you can handle calls (e.g., not before 9 or after 4)
- [ ] Be clear about scheduling and leave gaps between calls (i.e., 25 (30) mins or 50 (60) min)
- [ ] Indicate whether you'll call or client will call you
- [ ] If you prefer to use conference number, make this clear to your team members

3 **Computer information sharing**

- [ ] Determine what level of computer access is needed;
- [ ] Set clear expectations for engagement;

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ACCESS TO INFORMATION (WORK)

1 **Bank account info**

☐ Needed for reconciling invoicing, handling returns, managing payments etc.

2 **Shared folder system**

☐ Google Drive

☐ Dropbox

☐ Slack and other work platforms etc.

3 **Online Accounts**

☐ Access to organization website, social media accounts (e.g., Twitter, Facebook etc.) and external publishing platforms (e.g., Forbes etc.)

☐ Access to email accounts, calendar etc.

4 **Calendaring systems**

☐ Determine how you will calendar meetings and events

☐ Be clear about what scheduling decisions your team members are free to make on their own without your input

ACCESS TO INFORMATION (LIFE)

*This is optional (not every team member will also be supporting you and your family on a personal level) but if they are, here are a few things to which they should have access.

1 **Information sharing**

☐ All personal info (birthdays, personal and family members' SSNs, trusted traveler numbers, emergency numbers, addresses, etc)

☐ Credit card numbers

☐ Passwords to all accounts (e.g., shopping and email accounts etc.)

  • *LastPass allows you to share your logins*

2 **Travel preferences and FF info**

☐ Seat preferences (e.g., aisle and seat)

☐ Flight time preferences

☐ Hotel chain preference and membership numbers

3 **Preferences in general**

☐ Team member should know what foods, colors, places, and restaurants you love (remember this can also help them more easily set up meetings etc.)

4 **Names and numbers**

☐ Doctors, dentists, physical therapists, pharmacy etc.

☐ Hair stylists, nail salon, massage therapist etc.

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