

Pyramid of team dynamics

Goals:

What is our team aiming to achieve?
By when?
How does this contribute to what
our organisation is trying to achieve?

Who is responsible for
doing what?
How will we structure
ourselves?
How will we share what
we are working on?

Roles:

CLARITY

Pyramid of team dynamics

What will we do to share both our successes and failures?

What will we do to make sure everyone is able to be heard?

How will we share what we need help with or are unsure about?

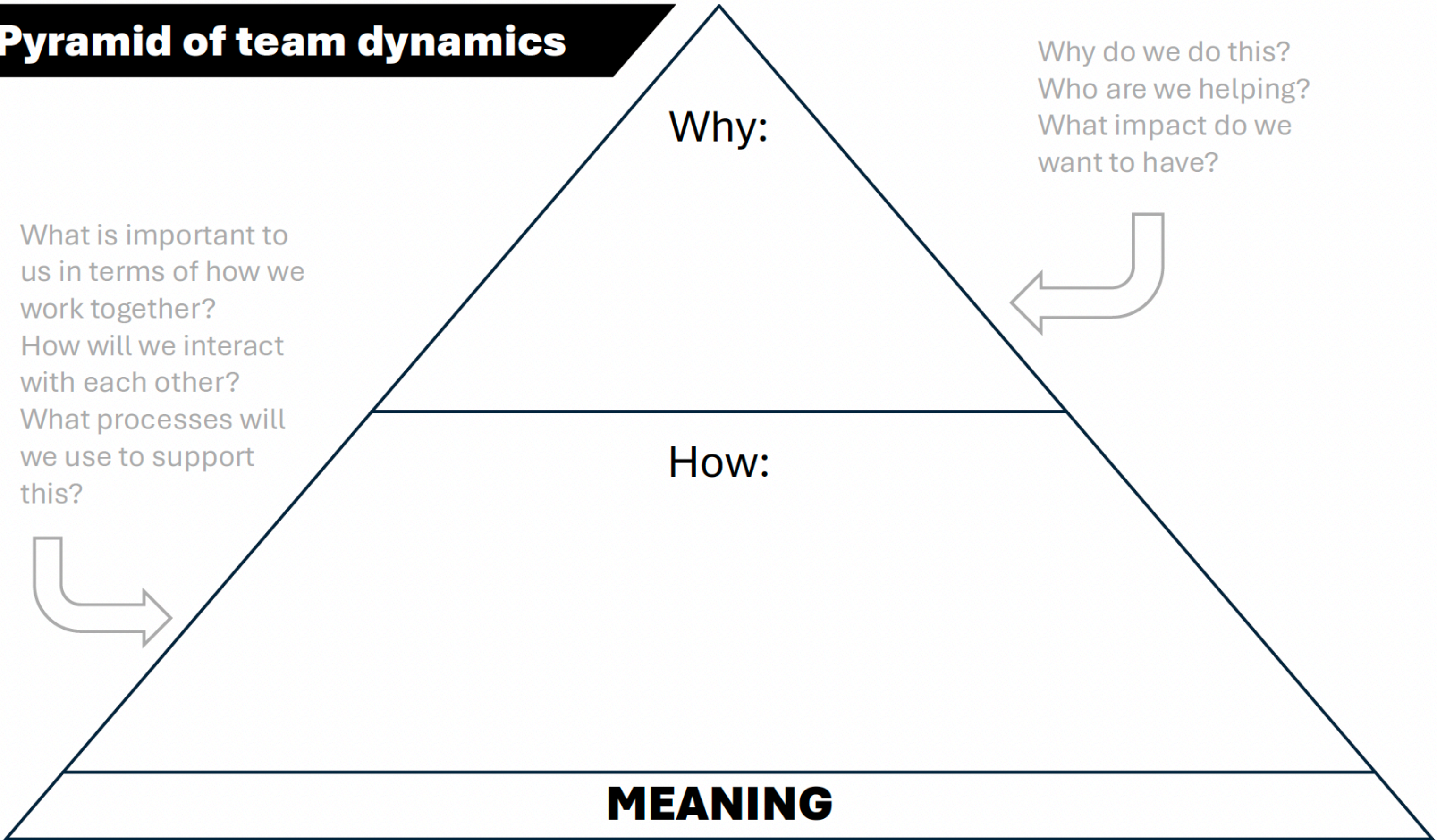
Learning:

How will we experiment?
What will we do to stay curious?
How will we learn from our mistakes?

Transparency:

PSYCHOLOGICAL SAFETY

Pyramid of team dynamics



Resourcing Tool: Pyramid of Team Dynamics

Create the conditions for a healthy and effective team

What is it?

The Pyramid of Team Dynamics is a facilitation exercise that helps teams discuss and agree on the foundations of effective teamwork. The framework focuses on three core elements:

- Clarity
- Psychological Safety
- Meaning

It draws on research from Amy Edmondson on psychological safety, Richard Beckhard's GRPI model, and insights from Google's Project Aristotle.

Why is it useful?

Diverse teams can be powerful, but only when the team dynamics are healthy. This exercise encourages open discussion about:

- Shared goals and roles
- How the team learns and communicates
- The deeper purpose behind the work

When to use it?

Use this exercise when forming a new team, or when a team is growing or evolving. It can also be revisited periodically to refresh team norms and expectations.

How to use it?

Use the pyramid template to guide discussion across three dimensions:

Clarity

Agree on the team's goals, roles, and how work will be coordinated.

Psychological Safety

Discuss how the team will experiment, learn from mistakes, and ensure everyone feels able to contribute openly.

Meaning

Reflect on why the work matters, who it helps, and how the team wants to work together.

Capture key agreements on the pyramid template. The pyramid can then be displayed in a shared space as a visible reminder of how the team has chosen to work together.

Pre-mortem

Project: Date:



Here lies ...

Original goals:

1

2

3

Original plan:

1

2

3

4

5

It is three years on and the project has died.
What went wrong?



Resourcing Tool: Pre-Mortems

Explore in advance the factors that could cause a project to fail.

What is it?

A Pre-Mortem is a technique where a team imagines a future point in time where the project has already failed, and then works backwards to identify what might have caused that failure. By mentally stepping into the future and reflecting on the failure, teams can uncover risks, assumptions, and vulnerabilities before significant resources are committed. The concept was popularised by psychologist Gary Klein.

Why is it useful?

Teams tend to be overly optimistic when looking forward, often overlooking potential risks. A Pre-Mortem works because it asks people to look backwards from failure, which makes it easier to think openly about what could go wrong. This helps teams:

- Surface hidden assumptions
- Identify potential weaknesses
- Strengthen their plans before execution
- Improve the likelihood of success

When to use it?

Pre-Mortems are most valuable before committing significant resources to execution. They are particularly useful when:

- The project is complex
- The stakes are high
- The consequences of failure would be significant

Conducting the exercise early allows teams to adjust plans with minimal cost.

How to use it?

1. Set the future scenario. Explain to the team that it is several years in the future (or another relevant timeframe). Deliver the news that the project has failed and has been shut down. Use language that reinforces the scenario:

- Not “the project might fail”
- But “the project has failed”

This helps people fully step into the imagined future.

2. Generate possible reasons for failure. Ask participants to individually brainstorm reasons why the project failed, writing one idea per note. Encourage them to consider:

- Internal processes
- Team dynamics
- Resource constraints
- External pressures or changes

3. Share and discuss

Bring the group together and collect the ideas. Discuss how these factors may have contributed to the failure and cluster related issues. Then identify the most significant or likely risks.

4. Return to the present

Once the possible causes of failure have been explored, bring the team back to the present. Now ask:

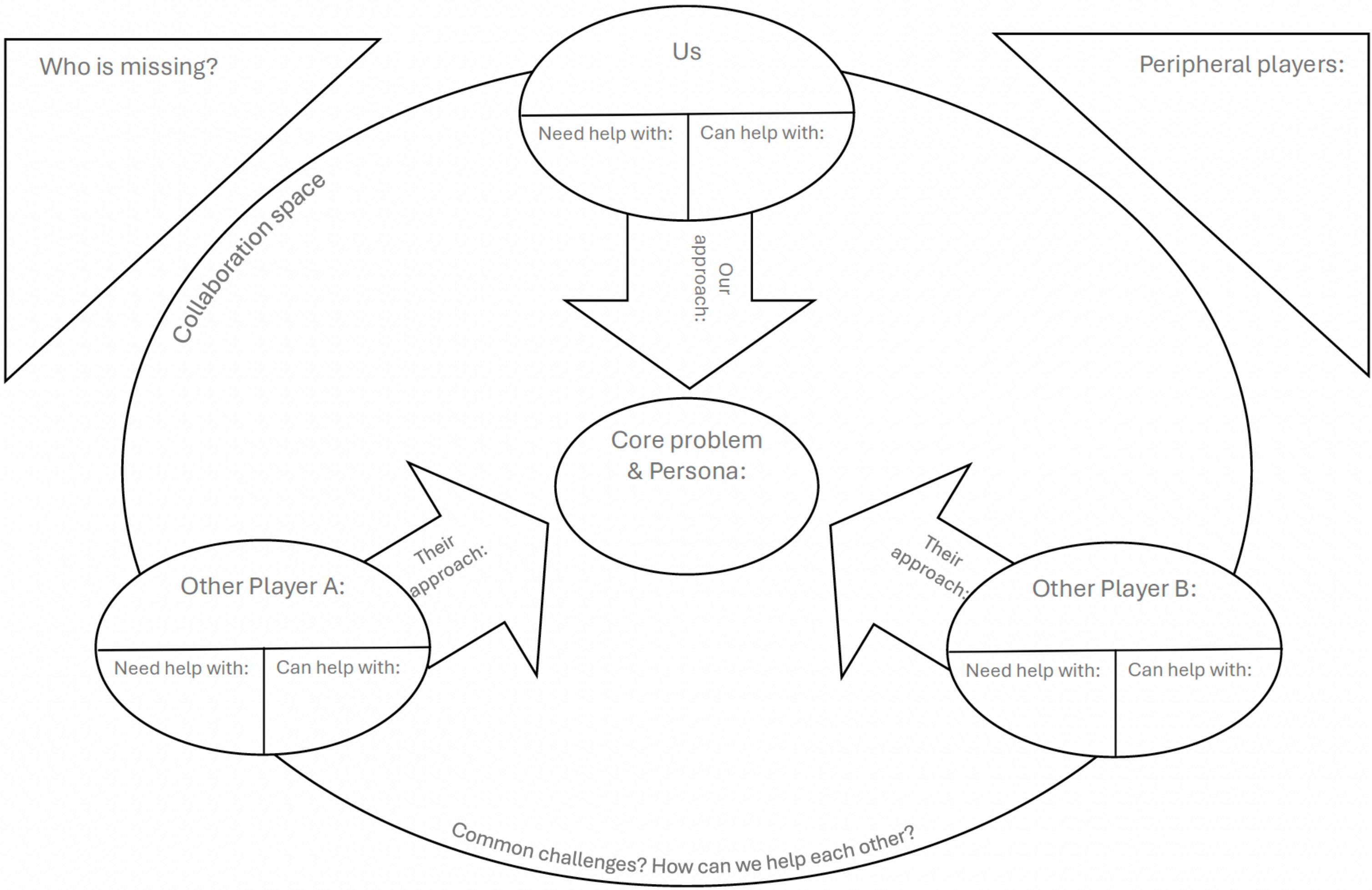
- What can we do today to prevent these outcomes?
- What contingency plans or safeguards should be put in place?

5. Capture actions

Document the key risks and the preventive actions or mitigation strategies identified. These insights should inform how the project is resourced, managed, and monitored moving forward.

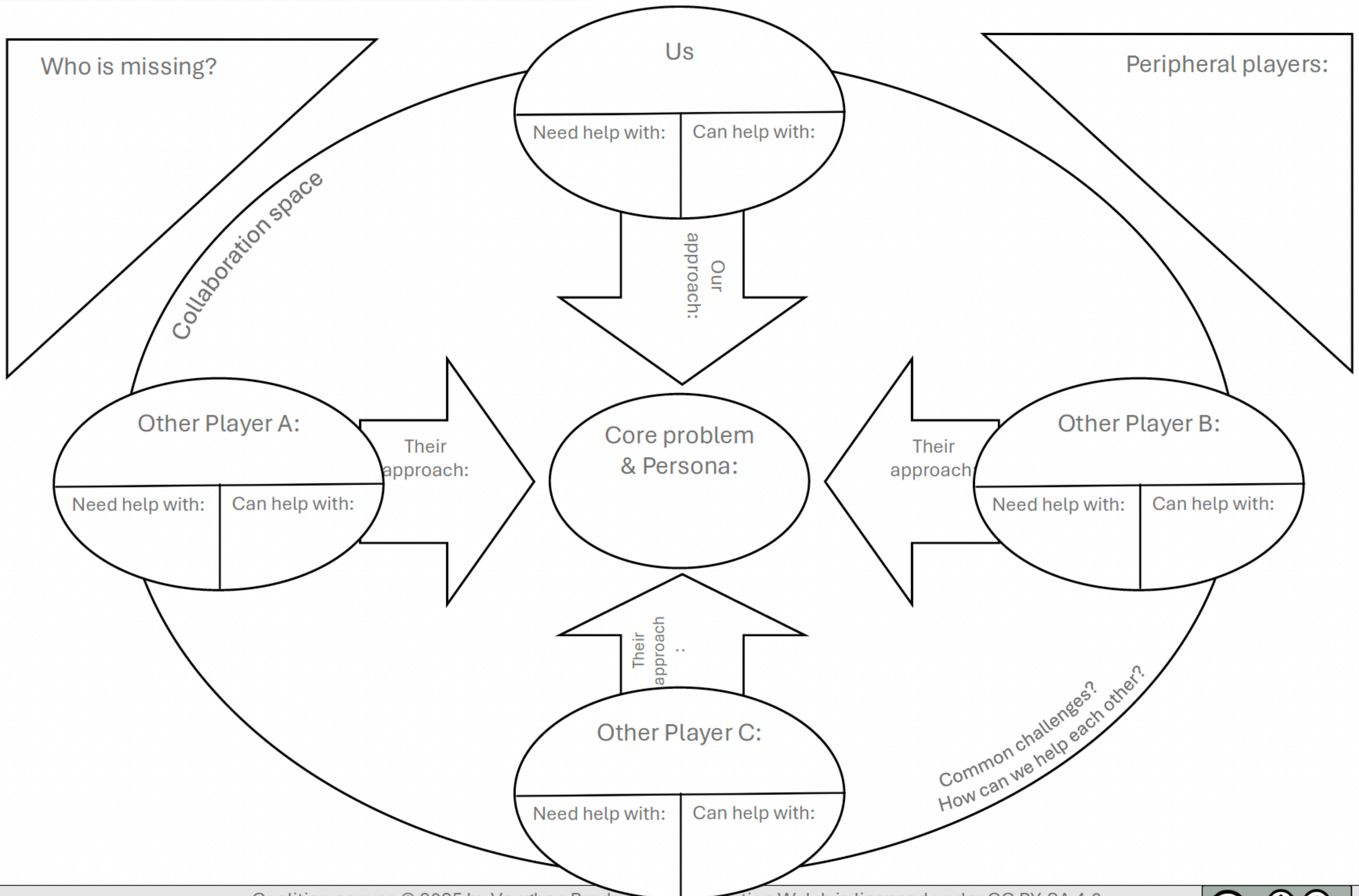
Coalition canvas

Project: Date:



Coalition canvas

Project: Date:



Resourcing Tool: Coalition Canvas

Identify who else is working in the space and how you might collaborate.

What is it?

The Coalition Canvas is a tool for mapping the organisations, groups, or stakeholders working around a particular problem and exploring how collaboration could create mutual benefit. It helps teams understand:

- Who else is active in the space
- What approaches they are taking
- Where collaboration or alignment may be possible

Why is it useful?

Complex problems are rarely solved by a single organisation or team. Often there are others already working in the same area, tackling different parts of the issue or approaching it from another perspective. Without coordination, new initiatives can unintentionally duplicate effort, compete for resources, or fragment support. The Coalition Canvas helps identify opportunities to work together rather than compete, particularly in complex social or multi-stakeholder environments.

When to use it?

This tool is most useful early in the Resourcing phase, once you have an initial idea of:

- The skills and capabilities required
- The resources needed
- The scale of the effort involved

It is particularly valuable when you recognise that your team cannot do everything alone.

How to use it

1. Define the user at the centre. Start by identifying the shared user or group affected by the problem. Place this user at the centre of the canvas.

2. Map your approach

Describe your team's proposed solution or approach. Discuss:

- What you are trying to achieve
- What capabilities or resources you might still need

3. Identify other players in the space

Map the organisations, groups, or individuals who are also active in this area. For each player, consider:

- What approach they are taking
- What part of the problem they are addressing
- Where their work overlaps or differs from yours

4. Explore collaboration opportunities

Discuss how different players might support one another. Ask:

- Are there shared challenges everyone faces?
- Are there opportunities to collaborate on common issues?
- Could different approaches complement each other?

5. Identify peripheral and missing players

Consider who else might be connected to the space. This may include:

- Peripheral stakeholders who influence the system but are not directly involved
- Adjacent organisations working with similar users or issues
- Missing players whose perspective has not yet been considered

6. Engage the coalition

Once the canvas has been created internally, the next step is to engage with the other players. Bring them into the conversation to understand their perspectives and explore where collaboration could create mutual value.

The goal is to build alignment and shared effort where it makes sense for all involved.

R-E-S factors

Project: Date:



Persona /
Context /
Initiative

Rational (direct the Rider)			Emotional (motivate the Elephant)			Situational (Shape the path)		
<i>Follow the bright spots</i>	<i>Script the critical moves</i>	<i>Point to the destination</i>	<i>Find the feeling</i>	<i>Shrink the change</i>	<i>Grow your people</i>	<i>Tweak the environment</i>	<i>Build habits</i>	<i>Rally the herd</i>



Resourcing Tool: RES Factors (Switch)

Identify the conditions needed to make change possible.

What is it?

RES Factors is a simple framework for identifying the key elements required to support change and implementation. The framework highlights three critical factors:

- R – Rider: the logical and analytical side of change
- E – Elephant: the emotional and motivational side
- S – Situation: the environment or system shaping behaviour

The concept is adapted from the Switch framework.

Why is it useful?

Many initiatives fail because they focus only on logic and planning, while overlooking motivation and environment. RES Factors helps teams ensure they consider:

- Clear direction (Rider)
- Motivation and energy (Elephant)
- Supportive systems and structures (Situation)

When to use it?

Use this tool during the Resourcing phase when planning how a solution will actually be implemented and sustained.

How to use it?

Rider – Provide clear direction. Clarify what needs to happen and why. Ensure people understand the goal and the next steps.

Elephant – Build motivation. Consider what will encourage or energise people to support the change.

Ask: What will make people want to engage?

Situation – Shape the environment. Examine the surrounding systems and context. Ask: What structures, processes, or incentives need to change to make the new behaviour easier?

Direction EAST

Project: Date:

Persona / Context / Initiative	
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How might we make the initiative more...

Easy	
Attractive	
Social	
Timely	



Implementing Tool: Direction EAST

Use behavioural insights to gently guide people toward the desired behaviour

What is it?

Direction EAST applies behavioural economics to influence behaviour through small design choices, often called nudges. The idea was popularised by Richard Thaler and Cass Sunstein. Rather than forcing behaviour, nudges subtly shape decisions by designing the environment in ways that make positive actions easier.

Why is it useful?

As the designer of a solution, you inevitably shape how people interact with it. By applying behavioural insights, you can design experiences that encourage the behaviour you want to see, while still allowing choice.

When to use it?

Use this tool during the Implementation phase, when designing how people will interact with a new product, service, or process.

How to use it?

Apply the EAST framework, developed by the Behavioural Insights Team:

Easy

Reduce friction and simplify the action. Use defaults, remove unnecessary steps, and make instructions clear.

Attractive

Capture attention. Use design, personalisation, or incentives to make participation appealing.

Social

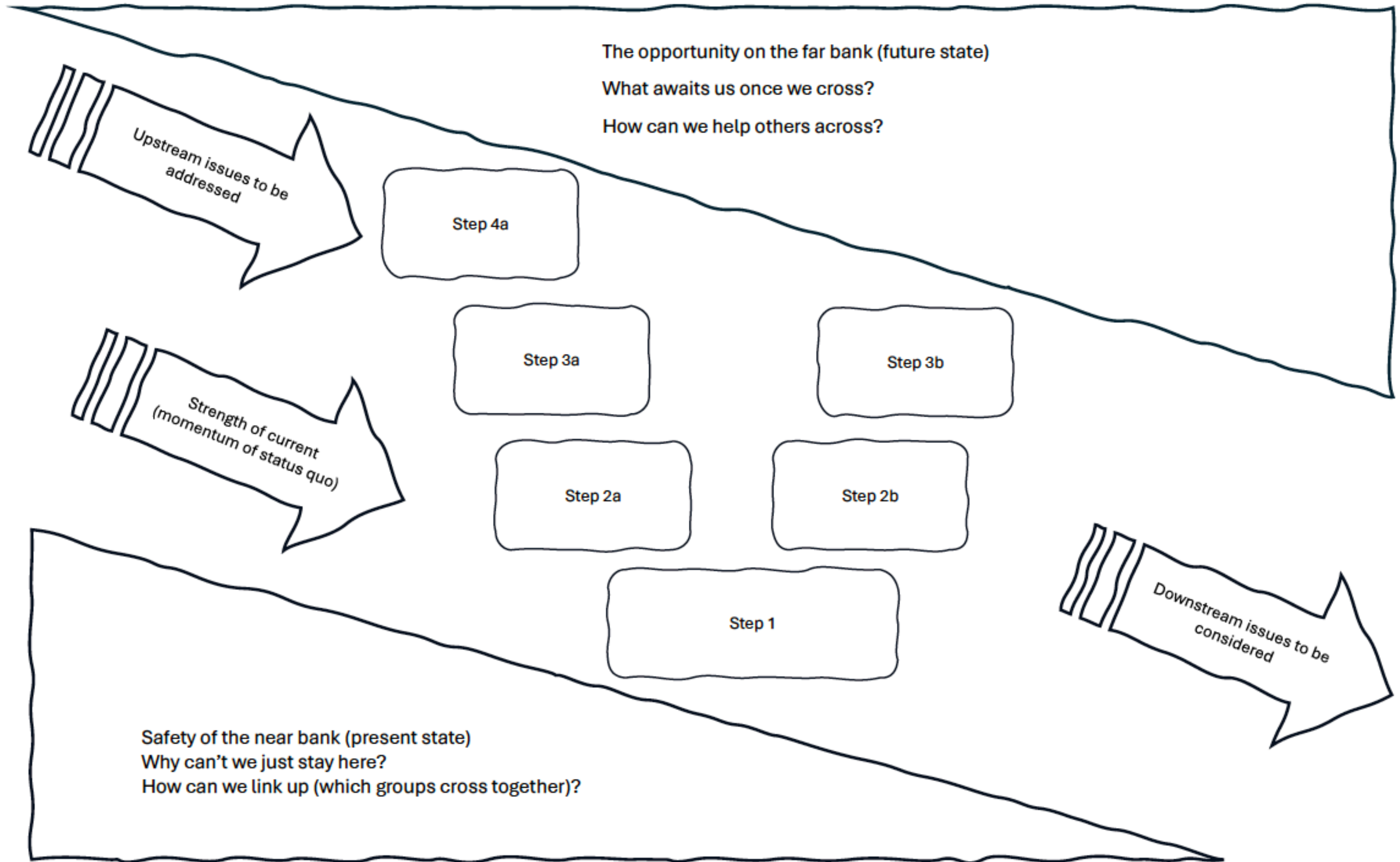
Highlight what others are doing. Use peer influence, networks, and visible commitments to encourage behaviour.

Timely

Prompt people at the right moment. Align actions with moments when people are most receptive to change.

Stepping stones

Project: Date:



The opportunity on the far bank (future state)
What awaits us once we cross?
How can we help others across?

Upstream issues to be addressed

Strength of current
(momentum of status quo)

Downstream issues to be considered

Step 4a

Step 3a

Step 3b

Step 2a

Step 2b

Step 1

Safety of the near bank (present state)
Why can't we just stay here?
How can we link up (which groups cross together)?



Implementing Tool: Stepping Stones

Use the metaphor of crossing a river to plan the journey of implementation.

What is it?

Stepping Stones is a facilitation tool that helps teams plan how a change or innovation will be rolled out. It uses the metaphor of crossing a river to explore the current state, the desired future, and the steps needed to get there.

Why is it useful?

Implementation is often complex and uncertain. The stepping stones metaphor helps teams visualise the journey, align on key challenges, and agree on how the rollout will unfold.

When to use it?

Use this tool with the implementation team when preparing to roll out a new initiative. It helps ensure everyone understands the journey ahead and contributes to shaping the process.

How to use it?

Facilitate a discussion using the river-crossing metaphor:

1. Near bank (current state) – Why can't we stay here? What problem requires change?
2. Far bank (future state) – What opportunity or outcome are we trying to reach?
3. River current – What forces or resistance may make the change difficult?
4. Stepping stones – What key steps or pathways will help us cross?
5. Groups crossing – Who should move together and support one another during the transition?
6. Support from the far bank – How can early adopters encourage others who follow?
7. Upstream influences – Are there factors that could slow resistance or make the journey easier?
8. Downstream impacts – What effects might this change have on others?

Capture insights on a visual template with sticky notes so the team can see the implementation pathway clearly. The tool can also be revisited later to review progress and refine the rollout.

Reflection canvas

Reflections of: Date:

Reflection in action / Past	<p>What happened? <i>Describe the experience, e.g. what was the situation, what decisions/actions did you take, how did you react in the moment to anything unexpected?</i></p>	
Reflection on action / Present	<p>Thoughts? <i>Why do you think you responded the way you did? What do you think about the experience looking back on it? What other questions did it raise?</i></p>	<p>Feelings? <i>How do you feel about the experience? What emotions did/do you experience? What was it that made you feel that way?</i></p>
Reflection for action / Future	<p>Learning? <i>What did you learn from the experience? What does this mean for how you might approach similar situations in the future? What other situations might the learning also apply to?</i></p>	<p>Meaning? <i>Why did/do you feel this way? How does this change, challenge or reinforce what you value? What do you feel now about this and/or what is most meaningful to you?</i></p>
	Thinking (cognitive)	Feeling (affective)