

# Six Steps for Developing Collaborative Teams

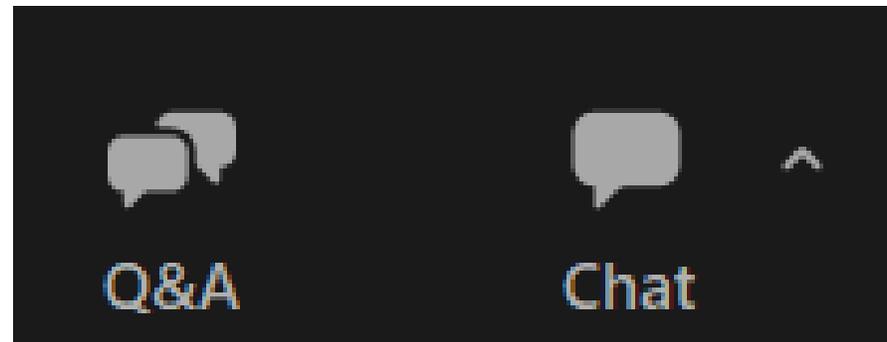
Presented by Gail Fann Thomas, EdD

October 29, 2024



# Before We Get Started

- Webinar is being recorded
- Slides will be sent out, along with resources
- Submit questions at any time using the Q&A
- Please use chat to share your ideas throughout the webinar



# Gail Fann Thomas, EdD

A portrait of Gail Fann Thomas, a woman with shoulder-length brown hair, smiling. She is wearing a blue and white patterned top and large hoop earrings. The background is a plain, light-colored wall.

Educator, author, consultant, executive coach

Taught graduate management and executive education at the Naval Postgraduate School in Monterey, CA for more than 30 years

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Specializes in communication, building collaborative capacity, conflict management, and team development

Currently working with private sector organizations and several federal agencies; mediator for Restorative Justice Partners

Published more than 60 academic articles, chapters and technical reports; co-author TKI Team Report

Lives in Monterey, CA

# Poll

## What's your experience developing collaborative teams? Choose your primary role.

- A. I'm a consultant who helps clients develop collaborative teams.
- B. I'm an HR or L&D professional within an organization who helps develop collaborative teams.
- C. I'm a team leader who wants to learn more about developing collaborative teams.
- D. I'm a decision maker within an organization who approves or manages programs about team collaboration.
- E. Other (please specify in chat box)



# Agenda

## How “Real” Collaboration Differs From Cooperation and Coordination

- Definition of collaboration
- Why it's important
- Gap in leadership development

## Cost and Benefits of Collaboration

- When not to use collaboration (cost)
- What we gain from using collaboration (benefit)
- Risks associated with not using collaboration

## Collaboration – “Good” Conflict

- Definition of conflict
- The Thomas-Kilmann conflict-handling model
- The collaboration mode – integrated problem solving

## Six Steps to Building a Collaborative Team

- Clarify your team's shared goal
- Know your teammates; understand their interests
- Jointly create desired behavior norms for the team
- Set clear roles and responsibilities
- Establish collaborative processes
- Engage in continuous discussion about your work together

## Applying the Steps to a Real-World Scenario

- Scenario
- Incorporating the TKI and MBTI
- Applying the six steps
- Structural imperatives

# A Growing Need for Collaboration

“As the global economy grows in complexity, it is increasingly apparent that collaboration is essential for the innovation and adaptation needed to stay ahead. After all, the most effective business strategies require input from various perspectives.”

Source: Forbes, Feb 6, 2023



# Collaboration Can Increase Team Performance

Companies that promoted collaborative working were **5 times** as likely to be high performing.

Source: Cross, R. Institute for Corporate Productivity (i4cp)



# Definition of Collaborative Teams

- Two or more interdependent team members with diverse skills and perspectives using an **integrative** approach toward a common team and organizational goal.

*“The sum is greater than its parts.”*



# How is “Real” Collaboration Different From Cooperation and Coordination?

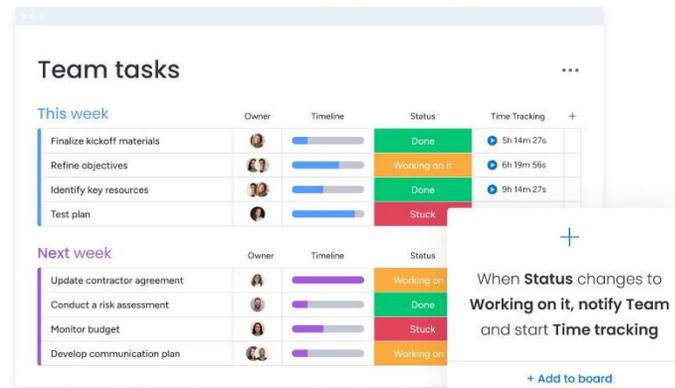
## Cooperation

Focus on **relationships** and getting along with one another. Harmony is key. May try to avoid conflict to preserve relationships.



## Coordination

Focus on coordinating individuals' **tasks** to accomplish a project. Can improve efficiency. May use coordinator.



## Collaboration

Focus on diverse views, healthy conflict, and **integrative solutions** among team members or other stakeholders. Especially useful for innovative solutions.



# Collaboration is Important but Not Usually Part of Leadership Development.

A recent study of senior and mid-level managers found that 91% of them said that collaboration was an essential or important part of their job.

Most claimed they learned collaboration from trial and error or childhood experiences.



Source: Thompson, B. (2022). How leaders develop collaborative leadership for effectiveness, EdD dissertation

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# Cost and Benefits of Collaboration

## Cost

- It takes time and energy to promote an integrative approach.
- Not all work should be collaborative. Can be inefficient and costly if used for routine or simple problems.
- Requires a diverse set of skills that many organizational members do not have.

**Be clear on what problems require collaboration and what problems do not.**

## Benefits

- It leverages maximum knowledge, skills, abilities from ALL team members.
- Promotes understanding – members who understand other members' interests, motives, preferences, and styles are better able to collaborate well.
- Allows for integrated solutions to complex problems – collaborative teams are better able to explore the real problem, offer a multitude of possibilities, and integrate the possibilities for the best solution.

# What We Risk When We Don't Collaborate Well

- Unclear or lack of shared goals
- Stovepipes proliferate
- Critical information is not shared
- Inability to address team members or stakeholder's key concerns
- Poor decision making
- Wasted resources
- Competition that results in suboptimal solutions
- Lack of innovation
- Opportunity to engage in constructive conflict

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# Collaboration as a “Good” Form of Conflict

- Collaboration purposefully brings together diverse functions, multiple perspectives, representatives from different organizations, countries, etc.
- These differences generate conflicts that can be handled effectively or ineffectively.
- The goal is to handle these differences in a constructive fashion toward a common outcome.

Turning  
differences  
into  
opportunities

# Definition of Conflict

- When two or more people find themselves in a situation that they care about
- And, they have perceived differences or incompatible ideas, perspectives, or concerns



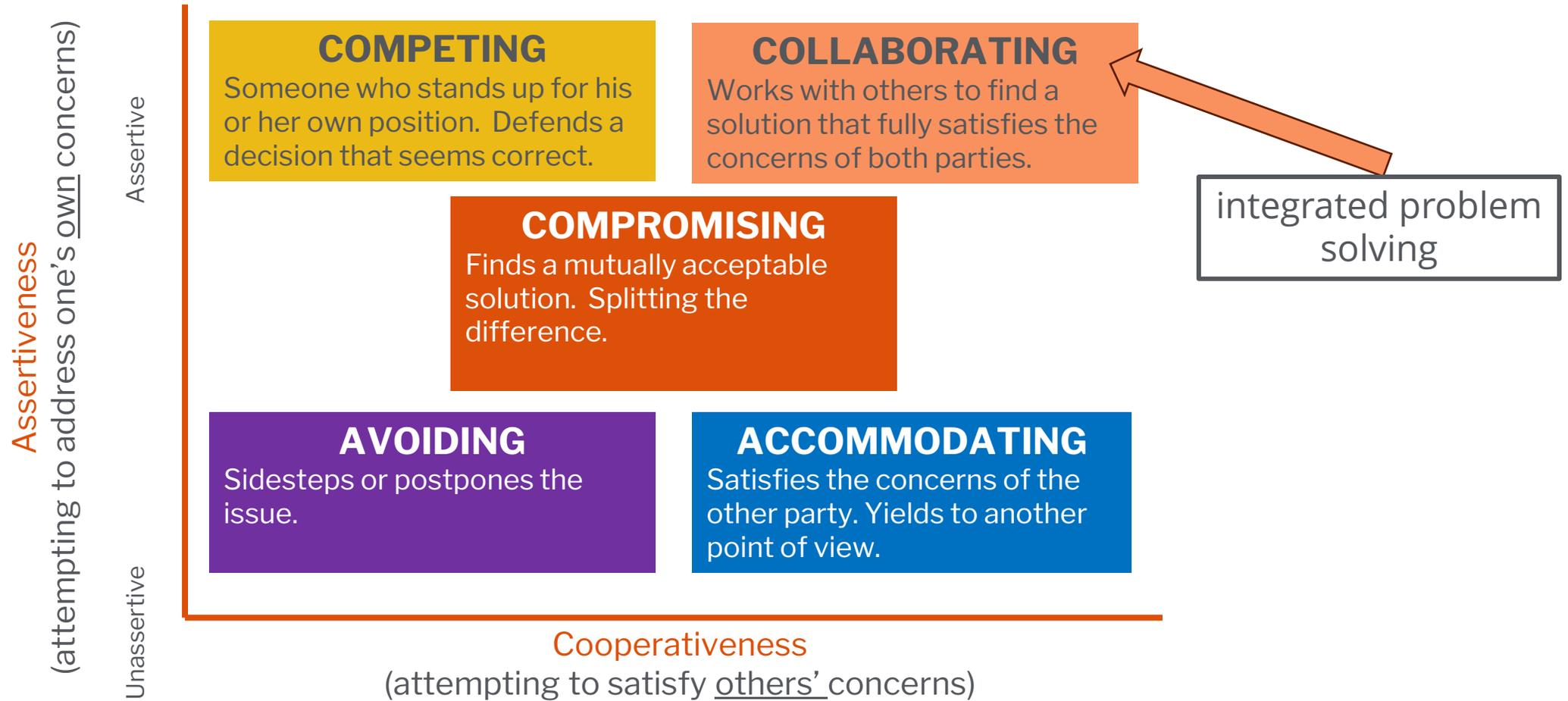
Source: Thomas, K. (2002). *Introduction to Team Conflict*, Myers-Briggs Company.

# Individuals Approach Conflict in Five Different Ways.

- The five approaches are competing, avoiding, accommodating, compromising, and collaborating.
- All five approaches can be useful, but the collaborative approach marries your interests with those of the other players to find the superior integrated solution to a problem.

A healthy  
approach to  
conflict can  
improve  
outcomes

# Using the Thomas-Kilmann Conflict-Handling Model to Jump Start Collaborative Efforts



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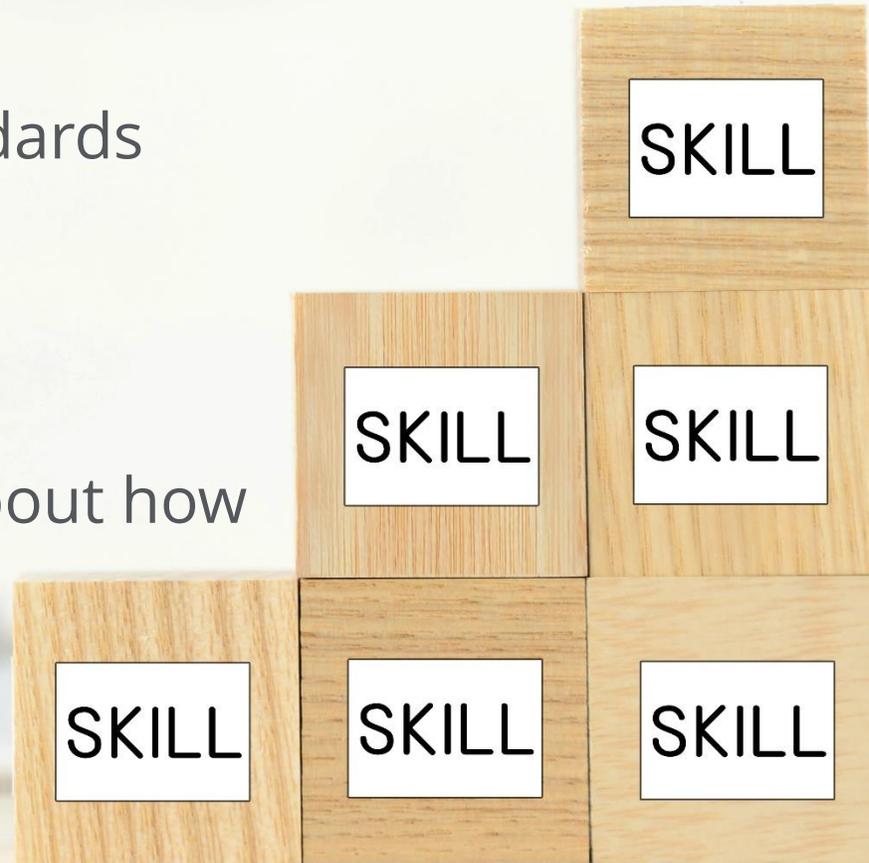
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# 6 Steps for Developing Collaborative Teams

1. Clarify shared goals
2. Know your teammates and understand their interests
3. Jointly create team behavioral standards
4. Set clear roles and responsibilities
5. Establish collaborative processes
6. Engage in continuous discussion about how the team is functioning



# 1. Clarify Shared Goals

## Why?

- Improves intra-team, vertical, and horizontal alignment
- Creates a higher-order team or organizational focus that reduces destructive conflict
- Provides the basis for metrics and measuring the team's progress

## How?

- Solicit senior leader guidance (mission alignment)
- Get stakeholder input
- Clarify terminology and conditions
- Use goal frameworks (e.g. S.M.A.R.T goals - specific, measurable, achievable, relevant, time-bound)
- Achieve consensus about goals and revisit often (stay focused on the common goal)

## 2. Know your Teammates and Understand their Underlying Interests

### Why?

- Can reduce destructive interpersonal conflict
- Capitalizes on team strengths and acknowledges team gaps
- Interest-based conflict management can increase likelihood of success

### How?

- Increase self and other awareness other leveraging assessments and reports (e.g. TKI Team Report, MBTI Team Report, MBTI Personal Impact Report, FIRO-B Interpretive Report for Organizations)
- Share information with each other (helps establish trust)
- Identify member commonalities and differences and develop ways to interact more effectively
- Acknowledge underlying interests (vs. staking positions)

# 3. Jointly Create Team Behavioral Standards

## Why?

- For a new team, or new team members, standards can set behavior expectations
- Can decrease interpersonal conflicts
- Can increase member satisfaction
- Can improve team climate and morale

## How?

- Get input from every team member. “How do we want to work together as a team?”
- Be sure to clarify what words mean in terms of behavior (e.g. what does “respect” look like?)
- Come to consensus on a manageable set of standards
- Monitor and provide feedback when standards are violated
- Have ongoing discussions with the team about standards as needed

# 4. Set Clear Roles and Responsibilities

## Why?

- Members have clear expectations about their work and the work of their teammates
- Can reduce destructive conflict among workers
- Increases efficiency and productivity
- Allow members to have ownership for tasks
- Offers accountability

## How?

- Identify tasks required for the project
- Determine team members skills, motivation, and goals to align roles and tasks
- Employ tools (e.g. RACI - responsible, accountable, consulted, informed) to track
- Monitor roles and responsibilities and adapt as project progresses

# 5. Establish Collaborative Processes

## Why?

- Improves information sharing to address various concerns and interests
- Allows integration across functions
- Can improve innovation, efficiency, productivity

## How?

- Explore various information sharing processes (e.g. brainstorming, position papers, constructive controversy, pro-con debates)
- Try integrative problem solving
- Determine decision-making process that fit the task, timing, and stage of the project (e.g. consensus, majority rule, unanimity, leader authority)
- Identify technology and tools that facilitate collaborative processes (e.g. Slack, Google docs, etc.)

# 6. Engage in Continuous Discussions about How your Team is Working Together

## Why?

- Puts a spotlight on team dynamics – what’s working, what’s not, ways to learn and improve collaboration
- Contributes to a healthy, well-functioning collaborative team that manages conflict well

## How?

- New teams should set expectations and norms for these discussions
- Teams can do process checks as needed throughout the project
- Team assessments can provide an opportunity for members to express their opinions – allows for a data-driven discussion among team members
- Team members should learn how to give and receive feedback for one another

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# Example Scenario

A professional meeting in a modern office setting. A man in a green shirt is leaning over a long wooden conference table, pointing at a document. A man in a tan suit stands on the right side of the table, looking at the document. Other people are seated around the table, some looking at documents. The room has large windows with blinds and indoor plants.

# Scenario

## Background information

- Organization Renew (OR) is concerned about its profitability. Customer retention is at an all time low and focus groups show that many customers are dissatisfied with their interactions with the company. The Board and Executive Team believe that the company has lost its customer focus.
- Senior leaders have noticed that many companies have shifted their strategic focus to a Customer Experience (CX) orientation and have found success. OR has decided to do the same in hopes of improving their customer's journey. Ultimately the goal is to improve the company's profitability.
- The CEO believes that a CX focus will diminish the company's functional stovepipes and improve information sharing among the various company's functions including finance, marketing, sales, and product development.
- The Executive Team has decided to form a cross-functional task force that will study CX and the implications for the company. After six months, the task force will present a recommendation to the Executive Team and the Board.
- Ms. Harriet Crow, the newest member of the Executive Team, is well-versed in customer experience methods and processes. She will provide senior-level guidance for this important company initiative.

# Applying the 6 Steps

## 1. Establishing the team's goals and timeline

Harriet created a team charter, identified desired outcomes, and set timelines for the task force. Jonathan Hyde from the sales team was asked to be the customer experience team leader.

Harriet and Jonathan worked together to hire a consultant/trainer (Mr. Jose Rodriguez) to help the customer experience team build their collaborative capability. The kickoff team meeting included an in-depth discussion about the desired outcome and timelines. The CX team decided to establish metrics to track progress and assure accountability with the Executive Team.

# Customer Experience Team Goals

- Identify best practices including pros and cons as they relate to our company
- Identify requirements for documenting and measuring the customer's journey
- Identify where and how CX might be integrated throughout the company
- Determine how organizations link CX to company profitability
- Prepare recommendations for Organization Renew's Executive Team, Board, and Department Heads NLT than 6 months

# Timeline

Dates	Activity	Comments
January	<ul style="list-style-type: none"><li>Identify CX best practices</li><li>Conduct 3 site or Zoom visits</li><li>Develop summary and analyze relevant practices</li></ul>	<ul style="list-style-type: none"><li>Budget requirements</li></ul>
February-March	<ul style="list-style-type: none"><li>Use data from best practices to create recommendations for a feasible process for documenting and measuring a customer journey at OR</li></ul>	<ul style="list-style-type: none"><li>Develop example customer journey maps</li></ul>
April	<ul style="list-style-type: none"><li>Identify possible touchpoints for company functional areas</li></ul>	<ul style="list-style-type: none"><li>Which functional areas would likely be impacted most</li></ul>
May-June	<ul style="list-style-type: none"><li>Prepare report for Exec team, board, &amp; department heads</li></ul>	<ul style="list-style-type: none"><li>Red team recommendations, write report and prepare slide presentation</li></ul>

# Applying the 6 Steps

## 2. **Knowing each other and acknowledging everyone's interests**

Jose had each member complete the TKI and MBTI assessments. Each member received a TKI Team Report and an MBTI Personal Impact Report.

Each member was offered a coaching session to discuss their assessment results.

Members shared their profiles with one another and came up with ways they could acknowledge their differences but use those differences to improve the team's functioning.

In particular, they discussed possible team dynamic challenges and brainstormed ways to address the challenges.



### Your Work Style

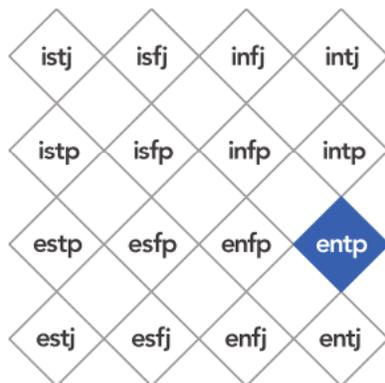
The descriptions presented below for your type relate to your work preferences and behaviors.

When reviewing this information, keep in mind that the MBTI assessment identifies preferences, not abilities or skills. There are no "good" or "bad" types for any role in an organization. Each person has something to offer and learn that enhances his or her contribution.

# MBTI Personal Impact Report

The MBTI® Personal Impact Report can help team members use their MBTI results to better understand themselves and their teammates with a goal of improving their interactions with one another.

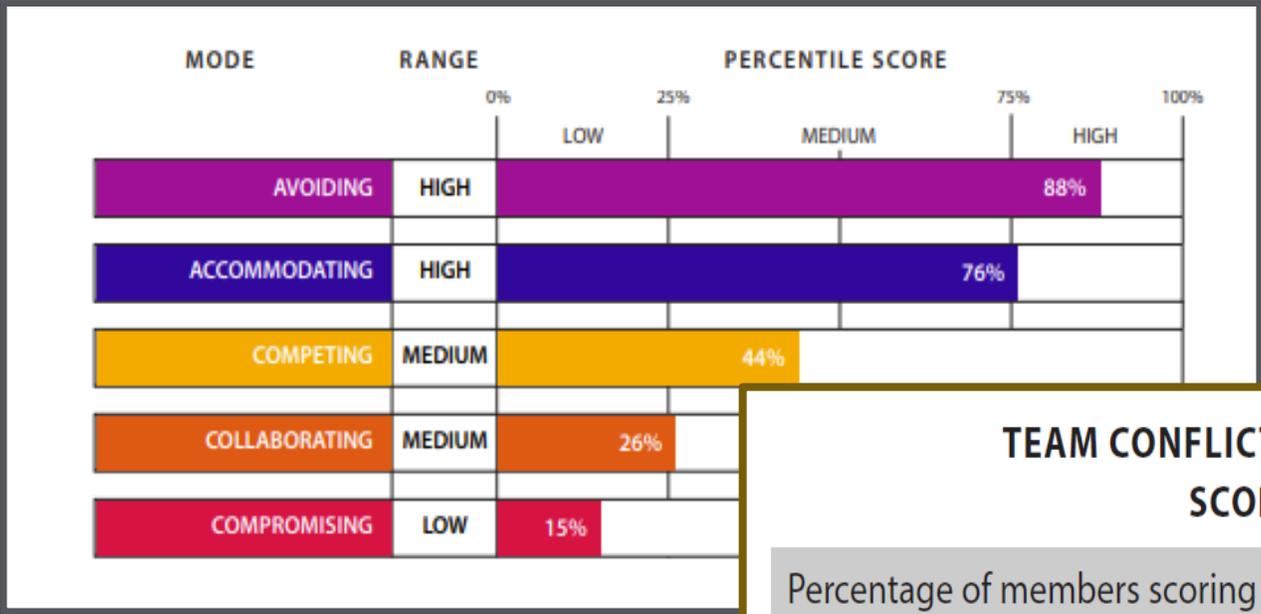
#### ENTP WORK STYLE HIGHLIGHTS



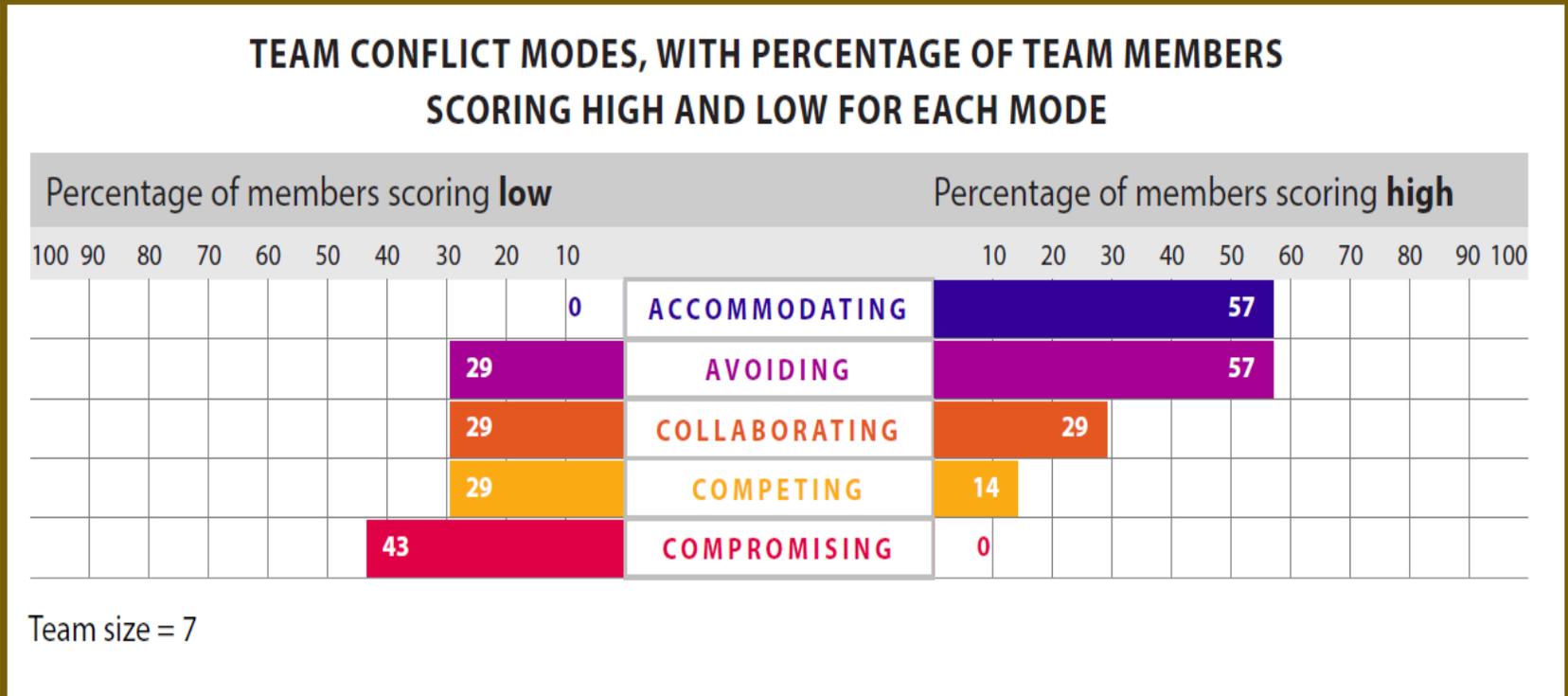
ENTPs are innovative, strategic, versatile, analytical, and entrepreneurial. They enjoy working with others in start-up activities that require ingenuity and unusual resourcefulness.

- Adaptive
- Analytical
- Challenging
- Clever
- Enterprising
- Independent
- Original
- Outspoken
- Questioning
- Resourceful
- Strategic
- Theoretical

# The TKI assesses individual and team conflict-handling approaches

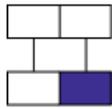


← Individual profile



Team profile →

*Thomas-Kilmann Conflict-Handling Instrument (TKI)  
Myers-Briggs Company*



### Your Team's Highest-Scoring Mode: Accommodating

(57% of team members)

Although accommodating can have implications, scoring high on this mode may mean that some team members may not yield better results.

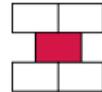
#### Interpersonal Relations: Challenges Highest on Accommodating

Teams that score highest on accommodating may require extra consideration that members show.

As you read the challenges and remedies, look for those that you see negatively impacting relationships that are most promising.

#### CHALLENGE

- Tolerating negative behavior.** A desire not to be rude or inconsiderate may mean that team members may put up with behavior from one or more team members that negatively impacts relationships within the team. For example, team members may accept one or more team members' being late to meetings, using sarcasm or domineering behavior, or not listening to other team members.
- Unvoiced resentments.** Members may not make concessions out of kindness or politeness may come to feel that they are being taken advantage of when others do not reciprocate. Unvoiced resentments can build up and may occasionally be expressed as accusations of selfishness and inconsideration.



### Your Team's Lowest-Scoring Mode: Compromising

(43% of team members)

Although it is unwise to use compromising in some conflict situations, the fact that it is your team's lowest-scoring mode may mean that some team members are **underusing** it—not using it in situations where it would help the team.

#### Interpersonal Relations: Challenges and Remedies for Teams That Score Lowest on Compromising

Compromising is possible when there are a range of possible decisions along some dimension—allocating resources, for example. In teams that score lowest on compromising, members tend not to settle for partial satisfaction of their concerns. Without this middle-ground option, the team may experience interpersonal stresses, often involving perceived unfairness.

As you read the challenges and remedies in the chart below, place a check mark next to any challenges that you see negatively impacting relationships within your team. Consider trying remedies that seem promising.

#### CHALLENGE

- Escalating tactics.** When middle-ground compromises are ruled out, conflicts of interest become more extreme; a solution is either win or lose. The stakes get higher in terms of what is at risk, both substantively and psychologically. Thus, some members may be tempted to use more extreme competitive tactics to prevail, such as politicking to build a coalition before a meeting or attacking opposing members. These tactics are generally seen as unfair, reduce trust, and create antagonism.
- Reluctance to negotiate.** Some team members may not want to negotiate compromises because they associate that with positional bargaining—where members take strong positions for a settlement that would benefit them and only reluctantly lower their demands until they reach an agreement. That form of negotiation often places heavy stresses on interpersonal relations and can result in unfair settlements for members who use more moderate tactics.

#### REMEDY

- Enforce norms of respect and honesty.** Insist that team members treat each other with respect and honesty. Respect is shown by civility and by listening to, and considering, the points made by others. Honesty includes having no hidden agendas or secret voting agreements with other team members, as well as telling the truth about issues being discussed.
- Use principled negotiating.** Many researchers recommend a form of negotiating in which members first negotiate a mutually acceptable principle of fairness to apply to their issue. "Suppose we just split the costs evenly?" "Let's ask Lars in Accounting how that is usually handled." After that, it becomes a relatively simple matter to apply that principle to their conflict issue.

(continued)

# The TKI Team Report Offers Challenges and Remedies for the Team's Highest and Lowest Scoring Conflict-Handling Modes

# Identify key interests and implications

Stakeholders	Interest	Implications
CX Team lead - Sales	Create demand for product/services	Identify ways that customer experience focus will change sales
Member B - Marketing	Customer needs, product/service design	Identify ways that customer experience focus will change marketing
Member C - Finance	Planning and managing company funds	Identify linkages between customer experience and finance
Member D – Product Development	Provide goods/services, quantity, quality	Identify process changes need for customer experience focus
Executive Team	Strategic planning, monitoring company profitability	Provide insights for changes to strategic planning, monitoring, and company metrics
Board	Ensuring accountability for Exec Team	Provide insights for Board monitoring
Other organizational members	Variety of interests	Identify members that might be most impacted by this change

# Applying the 6 Steps

## 3. Creating the team's standards/norms

Each team member provided input about their desired team dynamics. The consultant probed to determine what specific behaviors were expected.

After the discussion, Jose created a summary list of six team standards. Team members word smithed a few of the items and then unanimously agreed to abide by those standards with hopes that these would become team norms over time.

Team members learned feedback techniques and agreed to give and receive feedback to one another to uphold the team standards. They also agreed to revisit the standards as a group the following month and as needed thereafter.

# CX Team Standards

1. Treat each other with respect (no talking over one another, everyone is heard)
2. Focus on organizational goals; not protecting your department
3. Solicit input from all team members
4. Be open to new ideas
5. Practice constructive conflict management
6. Be prepared for meetings



# Applying the 6 Steps

## 4. **Setting the Roles and Responsibilities**

Jose and Jonathan developed a RACI model to determine roles and responsibilities for the team members. The team discussed the assignments so that everyone knew each others R&R. Team members were able to make some adjustments to accommodate individual desires.

# RACI documenting roles and responsibilities

Project Tasks	Team Lead	Team #2	Team #3	Team #4	Team #5	Ex Team	Finance Dept	Marketing Dept	Sales Dept	Product Dev Dept
ID best practices	A	R	R	R	R	I	-	-	-	-
Site visits	A	R	R	I	I	I	-	-	-	-
Summary	A	C	C	R	A	I	I	I	I	I
Customer journey	A	R	C	R	C	I	I	I	I	I
ID internal functions	A	R	R	R	R	I	C	C	C	C
Report	A	C	C	R	R	I	I	I	I	I

R=Responsible; A=Accountable; C=Consulted; I=Informed



# Applying the 6 Steps

## 5. Establishing collaborative processes

Jose worked with the team to determine collaborative process that would allow the team to develop integrated solutions for a customer experience journey.

These discussions included data gathering technique, data analysis, and collaborative decision-making processes.

# Collaborative Process for CX Site Visits

## Team Process

- Revisit team goal and review research on customer experience
- Discuss and determine criteria for site selections
- Create interview protocol for visits
- Subgroup conducts site visits (in-person or virtual)
- Full team reviews findings and interprets data
- Results documented for use in next steps

# Applying the 6 Steps

## 6. Engaging in discussion about how we work together

The consultant/trainer worked with the team to determine a relevant structure for discussion how well they were working together. These discussions might rely on team dynamic assessments which made it easy for members to express their opinions about the team dynamics. Data from the assessment showed how varied team responses were.

# Team's 1, 3, and 6-Month Progress

Average ratings to survey questions

Collaborative Efforts - Questions	1-month assessment	3-month assessment	6-month assessment
1. Our purpose and goals are clear	3	4	5
2. I trust my team members	3	5	5
3. We use team members' differing views and interests to learn and make decisions	4	5	4
4. We adhere to team standards that support positive team norms	4	5	4
5. Roles and responsibilities are clear	5	4	5
6. We use processes that support collaborative interactions	3	4	5
7. We periodically discuss how our team is working together and identify ways to improve	3	5	5

1 = Strongly disagree; 5 = strongly agree

# One Final Thought....Organizational Imperatives



Collaborative capabilities require alignment of organizational elements

# Further Reading

- Castaner, X. and Oliveira, N. (2020). Collaboration, coordination, and cooperation among organizations: Establishing the distinctive meanings of these terms through a systematic literature review. *Journal of Management*, 46(6), pgs. 965-1001.
- Hansen, M. (2009.) Collaboration: How Leaders Avoid the Traps, Build Common Ground, and Reap Big Results. *Harvard Business Press*.
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- Kilmann, R. (2023). Mastering the Thomas-Kilmann Conflict Mode Instrument - TKI. <https://kilmanndiagnostics.com/books/mastering-thomas-kilmann-instrument/>
- McKinsey & Company. (2022). What is CX? <https://www.mckinsey.com/featured-insights/mckinsey-explainers/what-is-cx#/>

# Podcast, Webinars, Assessments, and Reports

## **Podcast:**

[Conflict management podcast with Dr. Gail Fann Thomas | The Myers-Briggs Company \(themyersbriggs.com\)](#)

## **Webinars for individual and team conflict:**

[Developing Teams Using the TKI Team Report | The Myers-Briggs Company \(themyersbriggs.com\)](#)

[Managing Conflict for Three Types of Teams | The Myers-Briggs Company \(themyersbriggs.com\)](#)

[Navigating Hard Conversations | The Myers-Briggs Company \(themyersbriggs.com\)](#)

## **TKI conflict assessment and team report:**

Thomas-Kilmann Conflict Mode Instrument Individual Interpretive Report.

<https://www.themyersbriggs.com/tki>

Thomas-Kilmann Conflict Mode Instrument Team Report and Facilitator's Guide. <https://www.themyersbriggs.com/en-US/Connect-with-us/Blog/2022/October/The-New-TKI-Team-Report>

## **MBTI reports:**

MBTI Team Report. <https://www.themyersbriggs.com/en-US/Products-and-Services/-/media/myers-briggs/files/sample-reports/smp261248.pdf>

MBTI Personal Impact Report. <https://www.themyersbriggs.com/en-US/Products-and-Services/-/media/myers-briggs/files/sample-reports/smp216010v.pdf>



brrr°

case study | manufacturing

## Using constructive conflict to leverage growth at an innovative textile company

brrr° is a leader in the emergent cooling textile industry. Their multi-national team is based in Atlanta with remote offices in Taiwan and Shanghai.

Mary-Cathryn Kolb, who previously held senior positions at Spanx, Seven Jeans, TOMS Shoes and Von Dutch, had a vision of becoming an entrepreneur and global leader in innovative textiles. In 2014 she founded and became CEO of brrr° which is now a brand leader in cooling fabrics. brrr°'s scientifically lab tested "Triple Chill Effect" combines natural cooling minerals, active wicking and rapid drying that is used by many well-known retailers to manufacture state-of-the-art business clothing, casual clothing, athletic apparel, denim, uniforms, sheets, and other products.

brrr°'s workforce is a growing 21-person multi-national (three nationalities) team and is geographically dispersed with a home office in Atlanta and two site offices in Asia (Taiwan and Shanghai). Team members speak English and/or Chinese.

### Business Challenges

- Improve internal collaborative capabilities to support a rapid growth of manufacturing partnerships

### Company Profile

The textile market is evolving quickly with a trend toward fabrics that address climate change, sustainability, and comfort. As an ingredient brand, brrr° uses cutting-edge technology to create hundreds of cooling fabrics that are marketed and then co-branded with well-known clothing manufacturers. For example, Tommy Bahama sells a line of polos that touts its use of brrr°'s Triple Chill Effect that will keep you "cool and comfortable all day long".

A new case study about a multi-national team that must improve its internal collaborative capability to support a rapid growth of manufacturing partnerships.

Link will be provided to webinar registrants.

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# Questions? Insights?

