If You Don't Know Where You're Going, You Might Not Get There:

The Critical Role of the Interdisciplinary Team Manager

(Worksheet follows article)

As the interdisciplinary model of Collaborative DivorceSM continues to grow, practitioners who work in teams are painfully discovering that the appointment of a well-organized and technically adept team manager is critical. Designating a team manager has often been overlooked, undervalued and in retrospect, seen as a regretful omission to the process. In my experience, cases with high functioning team managers run smoothly, stay on track, experience less inter-team confusion and come to completion in a reasonable time frame. I use the word "team" manager as opposed to "case" manager because what is required is management of the team process and not the content. For those who abhor details, let's face it, allowing our compulsive counterparts to indulge themselves in managing details and reporting to the team in a well structured, sequenced, chronological and sometimes color coded manner has its benefits – why deprive them of their God given talent?

The role of the team manager has had little discussion up to this point in interdisciplinary trainings. According to Peggy Thompson and Nancy Ross, co-founders of the Collaborative DivorceSM model, New Orleans is one of the first areas in the country to strictly use this model. In contrast to Collaborative Law and other hybrids where the attorneys assemble the interdisciplinary team and manage the case, Collaborative DivorceSM begins with a set team of two attorneys, two Collaborative Divorce Coaches, one Child Specialist and one Financial Specialist. In this model, no one professional assumes more or less responsibility for keeping track of how the case is progressing. Without designating someone to consistently update all team members on the status of the case, they risk loosing track of the case itself or confuse it with another, miss out on opportunities to provide valuable input and/or lack information when assisting with team decisions if the case becomes unstable. I've heard "clueless" used by poorly managed team members on several occasions.

As a proud compulsive counterpart to what I've described above, my experience with teams that have neglected to create a solid foundation from the beginning of the case have been unnecessarily chaotic, frustrating, and unpleasant. Choosing a team manager and establishing base-line expectations is critical. As a collaborative team, a foundational value is to model good communication skills and appropriate means of dispute resolution. After two years of cases in New Orleans, our practice groups are consistently in agreement that teams who experience problems among the professionals will generally have problems with the clients. I'm of the opinion that as part of our professional service to our clients, we have an obligation to walk the walk.

As a practitioner from New Orleans, lets consider the relationship of a well-put together team akin to a good seafood gumbo. According to Frank Davis, a well-known New Orleans chef, "Experience has taught me that gumbo comes together best when everything is prepared in advance. Procedure is important and to get quality, don't skip any of the steps."

So what is the first step? **Awareness.** Educating the team about the value of the team manager. For those who have experienced a chaotic case, little convincing is necessary.

Step two: **Preparation** - In New Orleans, we are striving to have all team members present at the signing of the "Agreement to Collaborate" which commonly takes place at one of the attorneys' offices. That means that all team members have been chosen prior to this event. The agenda for this meeting is for everyone to meet, to chat about roles and expectations, answer questions, sign the agreement and set up appointments. Most importantly, this models collaboration among professionals and sets the tone for the case. Clients have reported that meeting everyone at the start of the case has relieved them of anxiety regarding "who are the other people and how will they treat me." The common perception to date regarding divorce is one of a battleground. The concept of divorcing in a way that preserves mutual respect is foreign and initially approached with skepticism by those either willingly or forcibly being moved into one of the most traumatic events of their lives.

Step three: **Creating Synergy** – Following the signing of the agreement and a debrief with clients, the professionals meet for approximately thirty minutes to choose the team manager and establish base-line team expectations. If no one is interested in the position, the team can decide to split the position, hire someone or have one of the attorneys use their paralegal. Using someone on the team is the best alternative. The time commitment will depend on the case. The team manager then runs the meeting to establish the following:

Role of the Team Manager:

- ✓ Organize the process and keep it moving
- ✓ Report the progress of the case to team members
- ✓ Identify "stuck points" and address them with the team
- ✓ Assist team members in providing information to the team as a whole
- ✓ Handle crisis among team professionals and clients
- ✓ Assist with issues between team members
- ✓ Maintain the "point position" for contacts and appointments
- ✓ Maintain an overview of the case to ensure that the needs of the parties are being met.
- ✓ Review the course of professional meetings

Fees:

- ✓ We will each charge individually for whatever we choose (travel time, emails, etc.)
- ✓ We will agree ahead of time if there is a no-charge meeting (not charging clients for our learning curve).
- ✓ We each agree to get an advance deposit (retainer) that will be kept current.
- ✓ We each agree to alert the team of non-payment past the retainer.
- ✓ We agree to support the position and payment of the team manager.

Communication Between Team Members:

- ✓ The preferred means of communication will be email.
- ✓ Unless an email states that it is for dissemination, it is understood that it is for professionals only, not for clients.
- ✓ No emails will be forwarded to any team member without the consent of the person who originated it.
- ✓ Emails from the team manager regarding setting appointments should be replied to the team manager only and not "reply to all."
- ✓ All paralegals will be instructed regarding the above.

Communication By the Team Manager:

- ✓ The team manager agrees to send out a weekly update on Mondays recapping the events of the case during the past week along with a cumulative list of all team members who have met.

Contact Information:

- ✓ Each team member has been given contact information for everyone participating in the case.

Consents:

- ✓ The consent to collaborate and the waiver of confidentiality have been signed and all team members have a copy.

Forms:

- ✓ Coaches and Child Specialist agree to send a copy of the Marital History Questionnaire, Goals, Child Information Questionnaire and any other important documentation to each of the team members as soon as possible.

Reports:

- ✓ The person designated to take minutes of a meeting agrees to send out a report to all team members within one week.

Agenda Setting:

- ✓ The agenda for meetings will be coordinated by the team member who calls the meeting unless a request is made for the team manager to do so.
- ✓ A proposed agenda will be sent out at least two days prior to any meeting so that other team members can propose additions or revisions.

Team Meetings:

- ✓ The team will decide who will attend meetings; majority rules. Consideration of the client's wishes will take precedence.
- ✓ A majority vote must be made before a full team meeting is scheduled.

Child Specialist / Financial Specialist:

- ✓ The child specialist and financial specialist agree to provide the other professionals with their report at least two days prior to the five-way with coaches or attorneys.
- ✓ The child specialist and financial specialist agree to debrief with team professionals regarding difficult areas and receive feedback prior to the five-way with coaches or attorneys.
- ✓ The financial specialist agrees to meet with the attorneys before sharing financial scenarios with the clients.

Data Collection:

- ✓ This case has – declined or agreed – to participate in the confidential survey
- ✓ If agreed: the clients have signed the consent and filled out their initial information
- ✓ The team manager agrees to forward information to local researchers and the national database.

Follow-up:

- ✓ The team manager agrees to do a follow-up at 3-6-12-18 and 24 months and forward a report to each member of the team.

I acknowledge this requires more of us. When working on teams where one or more members are new or where past experience warrants it, I suggest taking the time to touch on each point. Should problems arise, accountability and responsibility are covered. Here are several examples that have catapulted the "team expectations checklist" to our immediate attention.

What is the meaning of "transparency"? Some team members understood it to mean that every email and every conversation between professionals would be shared with all team members including the clients. Imagine an email being forwarded to a client that tactfully, yet frankly describes your assessment of why client #1 won't agree to get the house appraised? Can you say, "Oh, &%#$"?

What does the team do when a new team member insists on attending (and charging for) every meeting – start of case to finish – when the team and clients agree that it is not necessary? What if after a team meeting to discuss the issue it does not get resolved? Can you say, "now what"?

Imagine the surprise when the financial specialist is asked by one of the team members to help him or her collect the $1500.00 they haven't billed for. Can you say, "Sorry, billing your clients is your responsibility"?

How do you respond when a client asks why one team member didn't charge for a team meeting and another team member did? Can you say, "poor judgment"?

What happens when the child specialist refuses to share his/her report with the coaches prior to the five-way? Can you say, "non-collaborative"?

These are only a few of the issues that have found their way onto the team expectations checklist. I'm sure the process will be unique to different areas around the world and various team formations. Striving to head off potential team problems, and to address them up front, is what we are after. Assisting clients in restructuring their relationships is challenging enough. Team misunderstandings can be avoided by taking the time to lay a good working foundation.

Christine Lissard
Collaborative Divorce Coach
Collaborative Professionals Group of Southeast Louisiana

If You Don't Know Where You're Going, You Might Not Get There:
The Critical Role of the Interdisciplinary Team Manager

My Myers-Briggs Typology is: ____

I. Modeling Collaborative Behavior:

II. Creating Team Synergy:

- ❑ Why do we need baseline expectations for individuals and the team as a whole?
- ❑ What happens when we don't define each team member's roles and responsibilities?
- ❑ What happens when we don't have agreement among team members as to how the team will function?

III. Team Expectations

Role of the Team Manager:

Have you ever wondered…who is organizing the team meeting we agreed to have? Is my name listed on the waiver of confidentiality? What's going on in this case? How do I contact _______ ? Has the case started…….ended??? How is the family doing?

- ✓ Organize the process and keep it moving
- ✓ Report the progress of the case to team members
- ✓ Identify "stuck points" and address them with the team
- ✓ Assist team members in providing information to the team as a whole
- ✓ Handle crisis among team professionals and clients
- ✓ Assist with issues between team members
- ✓ Maintain the "point position" for contacts and appointments
- ✓ Maintain an overview of the case to ensure that the needs of the transitioning couple are being met.
- ✓ Review the course of professional meetings

Additions/Notes: ____

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Fees:

Imagine the surprise when the financial specialist is asked by one of the team members to help him or her collect the $1500.00 they haven't billed for. How do you respond when a client asks why one team member didn't charge for a team meeting and another team member did?

- ✓ We will each charge individually for whatever we choose (travel time, emails, etc.)
- ✓ We will agree ahead of time if there is a no-charge meeting (not charging clients for our learning curve).
- ✓ We each agree to get an advance deposit (retainer) that will be kept current.
- ✓ We each agree to alert the team of non-payment past the retainer.

- ✓ We agree to support the position and payment of the team manager.

Additions/Notes: ____

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Communication Between Team Members:

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Additions/Notes: ____

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Consents:

- ✓ The consent to collaborate and the waiver of confidentiality have been signed and all team members have a copy.

Additions/Notes: ____

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Forms:

When the case gets "sticky" wouldn't it be nice if all team members had a copy of the clients goals to refer them back to?

- ✓ Coaches and Child Specialist agree to send a copy of the Marital History Questionnaire, Goals, Child Information Questionnaire and any other important documentation to each of the team members as soon as possible.

Additions/Notes: ____

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Reports:

Ever leave a team meeting and have no idea – concretely – what the plan is or what you are suppose to be doing?

- ✓ The person designated to take minutes of a meeting agrees to send out a report to all team members within one week.

Additions/Notes: ____

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Agenda Setting:

NO SURPRISES for the clients or team members. Create an environment that is safe.

- ✓ The agenda for meetings will be coordinated by the team member who calls the meeting unless a request is made for the team manager to do so.
- ✓ A proposed agenda will be sent out at least two days prior to any meeting so that other team members can propose additions or revisions.

Additions/Notes: ____

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Team Meetings:

What does the team do when a new team member insists on attending (and charging for) every meeting – start of case to finish – when the team and clients agree that it is not necessary? What if after a team meeting to discuss the issue it does not get resolved?

- ✓ The team will decide who will attend meetings; majority rules. Consideration of the client's wishes will take precedence.
- ✓ A majority vote must be made before a full team meeting is scheduled.
- ✓ If a client refuses to use their coach, what part does the coach now play as part of the team?

Additions/Notes: ____

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Child Specialist / Financial Specialist:

What happens when the child specialist refuses to share his/her report with the coaches prior to the five-way? Can you say, "non-collaborative"?

- ✓ The child specialist and financial specialist agree to provide the other professionals with their report at least two days prior to the five-way with coaches or attorneys.
- ✓ The child specialist and financial specialist agree to debrief with team professionals regarding difficult areas and receive feedback prior to the five-way with coaches or attorneys.
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Data Collection:

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Additions/Notes: ____

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Follow-up:

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Technical Aspects of Organization and Time Management for the Team Manager

YOU MUST GET ORGANIZED

Programs:

Outlook Express
Outlook
ACT
Personal Website for each case

Tricks of the trade:

Use client named folders in a collaborative clients category - see below
Creating folders
Drag and drop

Create a "Team Folder" with all team members' names – see below

Name and date the outgoing message: Smith Team Update 45 12 06

Create a formula and stick to it - always use last name, topic, date

Always include yourself in any outgoing emails

If doing weekly updates, pick a day and stick to it

Create worksheets and checklists to allow you to access information quickly and easily

Create a system for scheduling team meetings

Color code – folders, paper, sticky notes, highlighters

Hang a bulletin board to keep information within view (remember confidentiality)

Get a bridgeline so you have a consistent phone number to call and easy access
www.thepacketcenter.com

Make a list of people who have experience that you can call when you have a question

Use a mentor

If you use binders with separator sheets – make them ahead of time (or however you keep your information together)

Have a file of "All Originals" in separate folders

READ, READ, READ – great source of information

Attend Practice Groups – listen for areas of difficulty that could/would benefit from a team agreement – come up with a solution and add it to your checklist of expectations

Share what you have learned or what you are doing with other collaborative members

At the end of the case, ask for constructive feedback

Additions/Notes: ____

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CREATING A "COLLABORATIVE CLIENTS" FOLDER

Highlight "In Box" by left clicking on it
With cursor over "In Box" – right click
Left click on "New Folder"
Type in "Collaborative Clients"

Click on "OK"
This will create a folder in your "In Box"

CREATING A FOLDER WITH A SPECIFIC CLIENT NAME

Highlight "Collaborative Clients"
With cursor over "Collaborative Clients" – right click
Left click on "New Folder"
Type in the clients name or however you wish to identify the case
Click on "OK"
Your clients name will now appear under "Collaborative Clients"

MOVING EMAILS FROM THE RECEIVED MAIL INTO THE CLIENT FOLDER

DRAG AND DROP
On the received email that you wish to move, left double click and hold down
Drag the email by sliding the mouse over to the folder you wish to drop it in. (Sometimes a circle or box will appear while dragging)
Release the left mouse button – the email will have moved from the received mail and into the client's folder

CREATING A TEAM EMAIL ADDRESS

Outlook Express
Left click on "Address"
Left click on "New"
Left click on "New Group"
Type in your designated team name i.e. "Smith Team"
Left click on "New Contact"
Enter info: First and last name, email address – you have to enter one person at a time
Left click "Add"
Left click "OK"
*Repeat "New Contact" for each team member – remember to include yourself
Each team member should now appear under "Group Members"
Left click "OK"

When creating an email: To: type the team name "Smith Team" and all your team members will receive an email under this one name.