**Team Facilitation Project: Using the personality assessment PrinciplesYou to guide virtual course teams**

**Abstract**

I discuss how I integrate the comprehensive personality assessment PrinciplesYou in a large online Organizational Behavior course. The discussion teams use this assessment to implement strategies on how to work together more effectively based on the strengths and gaps identified through this assessment.

**Key words**: online discussions, personality assessment, teams

**Team Facilitation Project: Using the personality assessment PrinciplesYou to improve performance of virtual course teams**

* **Introduction**. Provide a brief introduction that establishes a need for this type of exercise and identifies the target usage. Include potential course applications and explain for whom the exercise is designed: early undergraduate, late undergraduate, graduate, etc.; traditional, non-traditional, cross-cultural, etc.).

This exercise supports student teams leading online discussions by incorporating results from the personality assessment PrinciplesYou. Students experience firsthand how knowing some aspects of team members personality can help them learn to work more effectively with others on the team. Students see a direct application of course learnings to their work as a team.

PrinciplesYou (<https://principlesyou.com/>) is a comprehensive and free personality assessment. It was developed by Ray Dalio, Dr. Adam Grant, Dr. Bryan Little, Dr. John P Golden. It has been available since Spring 2021.

This exercise works for late undergraduate and graduate students. Some work experience is helpful but not necessarily required. This exercise works very well in a large online course on Organizational Behavior.

* **Theoretical Foundation/Teaching Implications**. Briefly specify the relevant background literature that the exercise is based upon and how your session contributes to effective teaching and learning in the field of management.

By incorporating their learnings from a personality assessment during their team discussion facilitation, students can experience first-hand how course concepts (personality) impact work life (working on a team). This practical application of course concepts increases motivation and understanding (Ambrose et.al. 2010). This activity makes it clear that concepts learned in class (personality) are immediately relevant and can be applied to make their teams function better. This immediate application and relevance of a concept improves learning (Jenking, 2015; Kember et al. 2008).

This exercise provides two main take-aways for the students:

* 1. Students learn to connect how personality can impact behavior and how this can help them identify concrete actions to take as a team in order to work more effectively together.
	2. Students become “experts” on the topic for which they facilitate the discussions. This increases student engagement. Since each student is part of a team that leads the discussions for a week, this also helps create greater community.
* **Learning Objectives**. Specify the learning objectives for the exercise by articulating the expected changes in knowledge, attitude, or skill that are associated with participation in the activity. What teaching topics are relevant to your session?

Learning Objectives:

Students will be able to translate course concepts (personality – behavior) into concrete steps they can take to work more effectively as a team.

Students increase their self-awareness and their understanding of strengths so they can create strategies to be a more effective team member.

* **Exercise Overview**. Provide an overview of the activity/exercise, including the logistics of running the exercise (e.g. timing, materials, class size), the flow of the exercise, variations or alternate applications, debriefing guidelines (e.g. questions to ask, how students generally respond). The goal is to give the reviewer enough information so that they understand what the activity is that you plan to present in your session.

Logistics:

* any class size, online, works well for large classes (I use it in an online course with 85 students)
* undergraduate – graduate
* Students have completed the PrinciplesYou assessment (<https://principlesyou.com/>) early in their work on the team facilitation project (leading online discussions on a topic for a week). I posted my detailed instructions for this facilitation project in the appendix.

Steps:

* Students individually complete the PrinciplesYou assessment as part of a discussion on personality early in the course.
* At the beginning of each team’s facilitation project (a week-long discussion of a particular topic) they complete the “Team Comparison Exercise” of the PrinciplesYou assessment (attached to this submission) on their own. They complete questions 4, 5, and 6 in teams of two. They then come together as the whole team (usually 5 to 7 members) and think through question 7 from the Team Comparison Exercise. The team is tasked to come up with 2 or 3 concrete actions they can take based on what they learned through the Team Comparison Exercise so they can work more effectively as a team. These actions need to be concrete and focus on taking advantage of the strengths on the team, as well as ways to manage some of the gaps.
* Students implement these actions during their work as a team.
* Once the team project is complete, they submit a discussion of how these actions they identified through the Team Comparison Exercise helped their team, and/or what they would do differently if they had to work together again. Essentially, I am asking here about what has worked for them, what has not worked and what different concrete action they would implement if they had to work together again.

Observations:

* I have used the PrinciplesYou component as part of the team facilitation project since Fall 2022.
* Feedback from students shows that for teams that take it seriously it does help with their team work and they are more satisfied with their group as a result.
* The Team Comparison Exercise of the PrinciplesYou Assessment is a completion component of the facilitation project. This of course means that not all teams take it seriously, which impairs the learning from it. I am trying to figure out how to make it a larger part of this project and also have it more consistently included by the various teams.
* **Session Description.** Provide an overview of what you will actually do in the MOBTS conference session. Include a timeline for the session and how participants will be involved. Remember, reviewers are looking for participant engagement in these sessions.
	1. I explain the reason for this exercise (the ability of students to connect OB concepts – personality – with team work they are doing as part of the class; and how applying what they learn in class can help them implement strategies to work more effectively in their teams) (5 minutes).
	2. I randomly assign all attendees into teams of 4. I ask them to pretend to be students who have just been assigned to a semester long project team for a class. (In a course, I will usually only assign everyone to a team once we have had several sessions and once students know each other a bit). I expect that everyone attending has taken the PrinciplesYou assessment and has the results accessible. I will have some sample Personality Assessments ready to discuss for those who have not completed their own.

Each team is then divided into pairs. Each pair completes the Team Comparisons Exercise (uploaded with this submission – also available here: <https://support.principlesus.com/team-comparisons-exercise>

I’ll ask all attendees to discuss their PrinciplesYou results by discussing points 4, 5, and 6 from this exercise. Points 1 through 4 are not applicable since attendees have not worked together before.

I’ll then ask everyone to get back together in their teams of 4 and come up with at least one concrete action they can take to maximize the shared strengths and to compensate for a shared gap, assuming they would work together as a team on a future project. Have at least a few teams share the concrete actions they came up with. Discuss overall reactions to this activity. (30 minutes)

* 1. Discussion of my experience with this activity in my graduate Organizational Behavior course (10 minutes, including Q&A).

**References**

<https://principlesyou.com/> free Personality Assessment

Ambrose S. A., Bridges M. W., DiPietro M., Lovett M.C. Norman M.K. (2010). *How learning works: Seven research-based principles for smart teaching*. John Wiley.

Jenkins, Rob. (2015). The 7 Fundamental Conditions of Learning. *Chronicle of Higher Education.* Vol 61, Issue 31.

Kember, D., Amber H., Hong, C. (2008). The importance of establishing relevance in motivating student learning. *Active Learning in Higher Education*. Vol 9(3): 249-263

**Appendix A**

What is PrinciplesYou (<https://principlesyou.com/>)

**“**PrinciplesYou was built to help people learn what they are really like. Its creators include **Ray Dalio**, entrepreneur and investor who grew Bridgewater Associates from his two bedroom apartment to the fifth most important private company in the US, and expert psychologists **Dr. Adam Grant**, **Dr. Brian Little** and **Dr. John Golden**. The test brings together their diverse expertise, combining best-in-class assessment frameworks, leading personality science, and practical and proven insights from decades of business experience”. (from principlesyou.com)

**Appendix B**

I provide the following info about the team facilitation project which includes a component based on the PrinciplesYou assessment (highlighted here in yellow).

**Facilitation Project: Detailed Info**

**Carefully read through the instructions for the team facilitation project BEFORE you start!**

**Tips for writing good discussion posts - Required Reading!!!**

Please make sure you check out these excellent tips for writing good discussion posts! Just copy and paste the link into your browser.
https://online.jwu.edu/blog/how-write-strong-discussion-post-infographic

1. **General Info:**
* If you are not the team facilitating the discussion, do not start a new thread.  Reply to one or more of the threads started by the facilitating team and/or to posts by your colleagues.
* If you are facilitating the discussion, the facilitation will NOT count toward your participation grade. This means that you will see a zero in the discussion column of the week that you facilitate. Your grade for the facilitation is in a separate column. You must contribute to 10 other units to receive full credit for your discussion participation.
* Just as you would with a research paper, provide citations when using other peoples’ works, thoughts etc.
* Even though your team will facilitate the discussions for one week, **you will be actively working on the facilitation project for at least 2 ½ weeks.** Please plan accordingly.
1. **At least a week BEFORE your facilitation starts:**

Carefully read these excellent tips for writing good discussion posts! Just copy and paste the link into your browser.

* https://online.jwu.edu/blog/how-write-strong-discussion-post-infographic
* Read the chapter and any assigned articles, watch any listed videos. While going through the material, make notes of anything you think might be interesting to bring up in the discussions.
* You are not required to include outside sources. The book and the listed articles/videos in the syllabus are sufficient. You may also include a discussion of any of the Connect assignments. **Make sure you include a discussion of all the required videos/articles listed for your topic in the syllabus.** Feel free to include some of the critical discussion questions that are listed at the end of each chapter.
* Coordinate with your team members and figure out some main topics from the chapter that you would like to discuss. Having a basic plan of what you will focus on during the discussions will help you manage the discussions during the week. It will also make it easier to write the summary.
* Complete the PrinciplesYou Team assignment (listed below as part 4 in section V – summary)
1. **Your team deliverable on Friday, 11:59pm (the FRIDAY BEFORE your team facilitation starts):**

Please submit a list of discussion starters that you will use for a review. Add them to one course message (with Team Number and “discussion starters for review” in the subject line). Attach your discussion starters as a word file. Copy all team members in the course message. I will provide feedback and you will have time to make changes before you start posting your discussion starters no later than Tuesday morning.

1. **During your facilitation week (Tuesday through Sunday):**
* Be ready to post no later than Tuesday morning and keep the discussions going all week. Based on past experience, expect the majority of discussion participation to happen Thursday through Sunday. However, you need to be active starting on Tuesday.
* **Add a thread titled: Facilitation Team Introduction.** Have each team member write a few sentences to introduce themselves to the class. This way, your colleagues know who the facilitation team members are for that week.
* Every team member is expected to log in several times a day during the week when your team facilitates. Your job is to start new discussion posts and to keep the discussions going throughout the week by actively participating in the discussions.
* Make sure you include the articles/videos that I added in the syllabus in your discussions.
* Suggestion: start with several of the discussion starters on Tuesday, and add some on Thursday through Sunday. Depending on how it goes, you can also add more early on and then not add any new ones on Saturday/Sunday. I expect that each team keeps the discussions going all week. If some discussions don’t receive much response, close them out and start a new one. Don’t let threads get too long. If you have a new discussion topic, start a new thread. If you "hide" a new topic within an existing thread, your colleagues will not find it. Please let me know (via course message) if you want to close a discussion and I will lock it. This is just to make sure everyone knows that the thread is closed (sometimes your colleagues overlook your posts stating that the discussion is closed). If a particular topic does not garner interest that is fine, just move one and add new ones.

 The objective is that there are always interesting discussions going on so your colleagues can easily participate throughout the week.

* It is important to make the discussion starters specific. Clearly state the topic of discussion in the thread title. The more specific it is, the easier it will be for your colleagues to contribute to and the easier it will be for your team to monitor and guide the discussions.
* **Monitoring and Guiding the Discussions:** Once a team member starts a discussion, they need to periodically check in. This means, they will need to add a post after every 3 to 5 posts of the classmates. In these posts, they may point out similarities of responses, or guide the discussion in a slightly different direction, or inject a view/point, based on the posts of others. It is NOT sufficient to just post the discussion starter and then never follow up. I suggest that each discussion thread is “owned” by a team member to monitor and guide along. However, all team members are encouraged to participate in the various threads. It just seems to work better for teams if the main duties of monitoring and guiding the discussions along are assigned to a particular team member.
1. **Your team deliverables on Friday, 11:59pm (this is the Friday AFTER the week of your facilitation): Summary**
* ***Submission for your colleagues to see*:** Each team is required to post a summary of the weekly discussions no later than 11:59pm on the Friday after the end of the discussion period for a topic. Add a new thread labeled “summary” in the discussion forum for your unit and upload the word document.
* ***Submission under the “Team Facilitation – Written Submission” assignment link***(this is for me, used for grading): One member of your team needs to submit, in **ONE word document, all the 4 parts listed below.**

1) List of all the discussion starters.

2) ﻿Summary of the discussions (this will be the major part of this

paper): ﻿﻿﻿﻿﻿﻿﻿﻿ The summary consists of your analysis of the discussions that

happened during the week. Did you see agreements, disagreements, etc. on certain posts? What seemed to be the most discussed topics, and why? Generally, I expect a write-up of the major themes of the discussions. Assume that you are preparing this for a friend who had to miss the discussions last week and would like to know what went on. Page expectations: 5 to 7+ pages of substance.

3) List of all references (to articles, videos - include links) etc. that you used from outside sources during your discussions. Remember- you are not required to use anything besides the textbook and the required videos/articles listed in the syllabus – no need to include references for those).

4) **A discussion of the PrinciplesYou Assessment – and how info from it can help you work better as a team. Complete this part at the beginning of your work together.**

Steps:

1. complete the PrinciplesYou Assessment individually.
2. with one (or two) other team member, go through points 4 through 7 of the “Explore Personalities on Your Team with Comparisons” exercises (it is posted under the Team Facilitation Area). Take notes.
3. as a team, discuss what you wrote in pairs as a response to point 7.
4. explain in writing at least 2 to 3 concrete actions you could take as a team to help you work more effectively as a team. Think about concrete steps you can take to balance one another, maximize a shared strength, or compensate where you have a shared gap. You will only include your team response to this last point in the write-up. It should be at least a short paragraph for each of the concrete actions.
5. After your facilitation project: as a team, reflect on how those actions described in part d) have helped/hindered your work as a team. Discuss at least one concrete action you would take as a team to be more effective if you had to work together again.

Note: the objective here is NOT a complete discussion of the PrinciplesYou Assessment and how it could help you work together more effectively. The objective is for you to at least come up with 2 or 3 concrete insights from this assessment that can help you work better as a team.