Team Health Assessment: Survey Template

A survey like this can be run for any legal organization, but to demonstrate precise language, this particular example is written for a single practice group of a large firm. If the intention is to run this survey across multiple practice groups, departments, or divisions, include the question at the end that asks participants to specify which group they serve so that the results can be separated by team.

Remember that a thorough Team Health Assessment consists of not just this survey but interviews as well. Use the results of this survey to inform those interview questions.

Survey Questions

1. Please review the following statements and indicate how well you agree with each on a scale from 1 ("strongly disagree") to 10 ("strongly agree"):

   Note: The [bracketed headers] are informative only and can be removed prior to sending the survey. They are intended as a reference for organizing the data after collection.

   1.1. [Trust] Team members readily admit to each other when they have made a mistake.
   1.2. [Trust] Team members are open about their strengths and weaknesses.
   1.3. [Ownership] Team members identify problems and solve them on their own without being asked.
   1.4. [Ownership] Team members put the needs of the team ahead of their own personal interests.
   1.5. [Ownership] I feel engaged and interested in the work that I do.
   1.6. [Ownership] I understand and appreciate the group's priorities and strategic direction.
   1.7. [Productive Conflicts] Team members readily voice their concerns.
   1.8. [Productive Conflicts] Managers are aware of and help resolve conflicts on the team productively.
   1.9. [Accountability] I know what it takes to be successful in my role.
   1.10. [Accountability] I regularly receive actionable, constructive feedback.
   1.11. [Accountability] I regularly provide upward feedback.

1.12. [Accountability] Team members are trusted to get the job done with minimal supervision or micromanagement.

1.13. [Equity & Inclusion] I feel my unique background and identity are valued.

1.14. [Equity & Inclusion] All team members have equal opportunities to advance.

1.15. [Equity & Inclusion] I have someone at the firm who actively supports me in my career (whether or not the person is a formal mentor).

1.16. [Equity & Inclusion] Practice group leaders care about what I think.

1.17. [Other] My pace of work is sustainable.

1.18. [Other] My compensation is reasonable given my role and contributions.

2. The leadership team is on the _____ track regarding our culture.
   - Right
   - Wrong

3. Aside from compensation, what factors do you value most as you continue your career at this organization? (Select at most 2 options.)
   - More responsibility
   - More creativity
   - Clearer advancement opportunities
   - Better management
   - Better work-life balance
   - Better team culture
   - Other (Please specify) _____

4. My job performance would be most improved by: (Select at most 2 options.)
   - More formal training
   - More clearly defining metrics for my performance
   - More efficient meetings
   - Making compensation and promotional opportunities more transparent
   - Providing clear constructive feedback
   - Providing better mentorship opportunities
   - Colleagues or managers improving their management skills
   - Increasing social activities
   - Reducing the pace or amount of work
   - None of these
   - Other (Please specify) _____

5. As a place to work, what are the practice group's greatest strengths?

_____

_____

6. As a place to work, what are the practice group's most significant weaknesses?

_____

_____

7. Is there anything else you would like to add?

_____

_____

8. Please indicate your level:
   - Associate <= 4 years
   - Associate 5+ years
   - Partner/Counsel

9. How long have you worked at this firm?
   - < 12 months
   - 1-4 years
   - >4 years

[Note: The following question is needed when running this survey across multiple practice groups at once.]

10. I work in the _____ practice group.
    - *[Insert appropriate options]*

Additional Considerations

When replicating this process with your team, there are a few watchouts to keep in mind.

1. <u>Survey design is a discipline unto itself.</u> I oversaw the user research team at a tech company for many years, a team with experts who could spot costly survey mistakes a mile away. If you do not have rich experience with survey design, be humble and ask for help. Your organization may have internal experts. If not, hire someone or just stick to templates that have already been well-tested (like the one above).

2. <u>Less is more.</u> When writing your own questions, be cognizant that adding questions will decrease both the response rate and the quality of responses. (This is known as "survey fatigue.") If you pair the survey with interviews, as I recommend, you only need the survey to *inform* the interviews, not replace them.

3. <u>"Everyone" means *everyone*.</u> This can also be a great opportunity to include nonlawyers, such as paralegals, assistants, IT, and others who are just as integral to the team's success. Also, do not not leave partners or other leaders out of the team health assessment. When I work with law firms, I include partners in both my surveys and my sample interviews. In fact, unhealthy dynamics among leaders are often the most important to uncover, since they trickle down into every aspect of the team.

4. <u>"Team" means *team*.</u> The Team Health Assessment is most useful when employed at a team-level, as opposed to trying to run a single, giant assessment against an entire organization. After all, we are trying to understand how a team functions, and every team may have its own subculture. For example, at large law firms, I typically run the assessment for each practice group separately, and for groups larger than fifty, I typically break it down further, such as by office or region.[1]

5. <u>Candor is currency.</u> Honesty tends to be the hard part. While surveys can be anonymized, interviews cannot. For very healthy cultures, a team leader can conduct the interviews personally and still achieve candor. Sometimes, it is better to use an "inside-outsider," like an HR representative or a leader from another group. Other times, only a true outsider like a consultant can earn sufficient trust to bring forth honest answers. The best approach will vary from team to team.

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[1] Practically speaking, the survey itself can be deployed across multiple groups at once as long as you ask questions that help you segment the data, but there is no similar shortcut for the interview process. For example, if I isolate a subset of thirty to forty attorneys, such as by practice group and region, I would typically conduct five to ten interviews within that group.