

The Coras Group: TEAM INVENTORY

A Team Inventory and workflow assessment guides organizations in answering one important question: "Do I have the right people in the right places?" This tool is often helpful when an organization is growing, taking on a new initiative or hiring for positions that are new to the team.

Team Inventory Process

Project Needs Identification

Your project lead will work with Aimee to identify the 10-12 main categories of work performed by the team.

Skills Survey

With feedback and approval from you, Aimee will design a survey that will assess team members' skills and experience, current efforts, preferences and professional development goals. Anonymously, the survey will also gather information on team support, communication and opportunities for improvement. *(time required = 20 minutes)*

1-on-1 Interviews

Each team member will meet individually with Aimee. Following a customized script, we'll discuss successes and challenges and review skills survey results. *(time required = 30 minutes)*

Gap Analysis

Results of the skills survey and individual interviews will be combined into a gap analysis report representing the organization's workflow, coverage, gaps and development opportunities.

Summary & Readout

The final work product will contain all of the above, as well as a summary deck detailing findings and forward-looking opportunities. A readout will be scheduled with leadership and, if desired, the entire team. *(time required = 90 minutes)*

Outcomes & Benefits

- Insight into team culture and communication
- Alignment of workflow with skills and interests
- Delineation of roles and responsibilities
- Increased productivity
- Confident delegation by CEO/Founder
- Identification of future improvement opportunities

