



## Research Base

This document sets out the research models included in Squadify and the mapping of each Squadify question to the research. Our objective is to capture the most important, relevant and current thinking around leadership and teamwork into a single tool to enable teams to have the data they need to drive their own performance. We continue to monitor research and update the Squadify question set as appropriate.

Squadify is a team-focused tool and as such it sits well in a framework of self/team/system assessments. Squadify can complement individually focused tools such as psychometric tests and organisational metrics like engagement surveys and collaboration platforms.

Squadify is built around the 3Cs model of leadership where leaders create the Conditions for Success for themselves and their teams. These conditions are Clarity, Climate and Competence. This theory has been implemented successfully for 25 years and in 2017 was the subject of a PhD thesis by a student at Wollongong University in Australia who determined that the 3Cs strengthened autonomy and motivation in its users.

Squadify is now the most comprehensive leadership tool in use. The original Squadify question set was validated by researchers at the London School of Economics in 2019 who found that all 37 questions were valid drivers of performance. Further research by another group from LSE in 2020 found that using Squadify strengthens team mental models which drives performance. In 2023 we updated the question set to include team conditions related to psychological safety and inclusion. There are now 40 Squadify questions.

Case studies with a pharmaceutical and a healthcare company demonstrate that using Squadify multiple times over one year enabled the teams to deliver financial performance above budget and enact culture change which drove accountability, engagement and performance.

The Dynamics represent an additional 'cut' of the question set for teams who are looking for a different perspective on their strengths and challenges. The six dynamics are defined to cover core elements of business performance and leadership and include Alignment (both directional and operational), Execution (both processes and behaviours), Motivation (including elements of culture and performance optimisation), Trust (aligned to the trust equation), Innovation (aspects of learning culture and ideation) and Psychological Safety (safety to speak freely, inclusion and ultimately safety to challenge).

Have any questions?  
Contact us: [thesquad@squadify.net](mailto:thesquad@squadify.net)







# Squadify Question Set (3 Cs categorisation)

Clarity	
Clear goal	Collins & Porras: BHAG, Project Aristotle: impact of work, Goal Setting, Real Teams: clear shared goal
Goal is achievable	Lencioni Level 3, Goal Setting
Clear measures of success	Goal Attainment Theory, Gallup G12: understanding expectations, Lencioni: level 5
Belief in what they are doing	Project Aristotle: meaning of work, Collins & Porras: purpose, G12: work is important
Alignment to organisation's direction	Project Aristotle: impact of work, Teams of teams: common purpose
Clear plans to achieve goal	Project Aristotle: structure and clarity, Goal Setting
Short term priorities deliver long term plan	Project Aristotle: structure and clarity, Goal Setting
Customer voice in team plans	Design thinking; Empathise, Agile: customer insights
Members have clear roles	Lencioni Level 4, Project Aristotle: structure & clarity, Agile: transparency of roles, Gallup G12: expectations of them
Work together towards the goal	Real Teams: shared goal, Teams of teams: shared consciousness, Shared Mental Models, Project Aristotle: dependability, SDT: relatedness
Climate	
Effective processes to run the squad	Agile, Shared Mental models, Tuckman: norming
Effective process for decision making	Agile, Shared Mental models
Allocate work across the team	Agile, Lencioni Level 4
Effective squad execution	Agile, Hansen: 20-mile march, Real teams: interdependency
Regular check-ins on progress	Agile: disciplined cadence, Real teams: meetings
Make the best of team strengths	Gallup Strengths, G12: best work
Safe place to share ideas	Project Aristotle: psych safety, Lencioni Level 1, Trust equation: intimacy, Psych safety, Design Thinking
Straight talking without offense	Lencioni Level 2, Radical candour, Tuckman storming, Killman conflict model
Build strong personal connections	SDT: relatedness, Trust Equation: intimacy, Gallup G12: best friend at work, Putnam social capital, Happiness Index
Happy at work	Agile: happy, Gallup happiness at work research, Happiness Index
Autonomy to make decisions	SDT: autonomy, Lencioni Level 4, Teams of teams: empowered execution



Learn from failures, no blame	Growth mindset, Agile: experimentation, Clark Psych Safety: learner, Design Thinking: Prototype, Gallup G12: learn
Squad has diversity	Gartner: D&I, McKinsey Diversity, Design thinking: Ideate
Enough resources to get the job done	Gallup G12: resources
Proactively collaborate with other teams	Team of Teams, Putnam Social Capital, Agile: supports others
Support from others in the org	Team of teams, Putnam Social Capital, Agile: supports others
Squad speaks with one voice	Trust equation: self-orientation, Shared Mental Models, Lencioni: level 1
Challenger safety	Clark Psych Safety: challenge, Growth Mindset, Radical Candour
Everyone is included	Clarke Pych safety: inclusion, Design Thinking: ideate, Gartner: D&I, Gallup G12: opinions count
Squad reflects together	Agile: retros, Design thinking: experimentation, Growth Mindset, Real Teams: meetings to reflect
<b>Competence</b>	
Squad interests above individual	Trust equation: self-orientation, Social Capital: reciprocity, Lencioni: level 1
Actively participate	Lencioni Level 3, Gallup G12
Listen to understand each other	EI: Social awareness, Trust equation: intimacy, Clark Psych Safety: contributor
Give each-other feedback to help	Growth mindset, Goal setting
Coach each-other to help	Sanford Challenge and Support model
Tests new ideas and adapts	Design Thinking: prototype, Agile: experimentation, Growth Mindset
Positive and constructive	EI: self-regulation, Gallup G12: commit to quality work
Deliver on commitments	Trust Equation: reliability, Project Aristotle: dependability, Lencioni: level 5
Resolve tension quickly	Kilmann conflict model, Radical Candour
Right technical skills	Trust equation: credibility, Self-Determination Theory: mastery

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# Summary of the underlying research included in Squadify

## **Patrick Lencioni – The five dysfunctions of a team (2002)**

- Level 1: Absence of trust > invulnerability
- Level 2: Fear of conflict > artificial harmony
- Level 3: Lack of commitment > ambiguity
- Level 4: Avoidance of accountability > low standards
- Level 5: Inattention to results > status & ego

## **Deci & Ryan – Intrinsic motivation and self-determination in human behaviour (1985) – Self Determination Theory (SDT)**

- Autonomy, Mastery, Relatedness

## **Converse, Salas, Cannon-Bowers – Shared Mental Models (1993)**

- The theory states that teams perform better if they have a shared understanding of the tasks and the teamwork required to achieve them.

## **Gallup G12 (1998)**

- Twelve factors that drive engagement and productivity at work including
  - understanding expectations of them, mission of org,
  - recognition, care, support to progress, development and learning
  - opportunities and equipment and resources to do their best work
  - feel their opinions count and their work is important
  - best friend at work, believe colleagues commit to quality work

## **The Happiness Index - neuroscience research**

- Happiness drives engagement and performance

## **Google Project Aristotle (2012)**

- Psychological safety: take risks without embarrassment
- Dependability: team members count on each-other
- Structure and clarity: goals, roles, execution plans
- Meaning of work: work purpose aligned to own purpose
- Impact of work: what we do matters

## **Jim Collins & Jerry Porras - Built to last (1994)**

- BHAG: clear and - compelling goal
- Core ideology - purpose and values

## **Daniel Goleman – Emotional Intelligence (1995)**

- Self-awareness
- Self-regulation
- Social awareness
- Social skills/relationships

## **Jim Collins and Morten Hansen: Collaboration (2009)**

- 20-mile march: disciplined execution



**Donald Clifton – Soar with your Strengths (1995)****Gallup Strengthsfinder assessment (1999)**

- Using individuals' strengths improves motivation and delivers higher performance

**Gallup Happiness at work research – At work, feeling good matters (2005)**

- At work, Feeling good matters

**David Maister – The Trusted Advisor (2000)**

- Trust Equation
  - Reliability: you deliver on your commitments
  - Credibility: you have the right technical skills to do the job
  - Intimacy: team members build strong personal relationships
  - Self-orientation: members prioritise the team over themselves, speak as one outside the team

**Design Thinking – an approach defined by Stanford Design school and popularised by IDEO (1991)**

- Empathise: understand customer needs
- Ideate: generate ideas, non-judgmental, evaluate, prioritise
- Prototype: experiment, fast prototype, fail fast, learn

**McCrystal et al - Teams of teams (2015)**

Four competencies that fuel individual, team and organisational success:

- Common Purpose
- Shared consciousness
- Empowered execution
- Trust

**Agile Manifesto (2001)**

Jeff Sutherland – Scrum: The art of doing twice the work in half the time (2014)

- Transparency of tasks/roles
- Removing impediments, reduce waste
- Communication focused on the process not the individual
- Customer insights drive everything we do
- Disciplined cadence of progress checking
- Experimentation to learn
- Review, continue, pivot
- Happiness at work is only predictor of future performance
- Team supports others outside their own remit

**Kim Scott – Radical Candour (2017)**

- Caring personally
- Challenging directly

**Bruce Tuckman – Stages of Team Development (1965)**

- Forming
- Storming
- Norming
- Performing

This is an old theory developed in a time when teams were typically stable and long lasting. In an agile world, we consider it possible or even likely that these four stages can be present simultaneously

**Thomas-Kilmann – Conflict mode (2008)**

- Collaborating
- Compromising
- Competing
- Accommodating
- Avoiding

**Carol Dweck – Mindset: The new psychology of success (2006)**

- Growth mindset
  - Embrace challenges
  - Persist in the face of setback
  - Effort as the path to mastery
  - Learn from criticism
  - Inspiration in the success of others



**Robert Putnam – Bowling alone: The Collapse and revival of American community (2000)**

- Social capital
  - Bridging
  - Bonding
  - Reciprocity

**Diversity research – McKinsey, Gartner**

- Delivering through diversity (McKinsey 2018)
  - diversity of employees at all levels increases value creation and profitability
- Diversity and Inclusion build high performance teams (Gartner 2019)
  - gender-diverse and inclusive teams outperform gender-homogeneous less inclusive teams

**Coaching – Nevit Sanford Challenge and Support model (1962)**

- For growth to occur an individual needs a balanced amount of challenge and support as appropriate for the task

**Locke & Latham's Goal Setting Theory (1990)**

- Theory states that goal setting drives task performance - five principles:
  - clarity
  - challenge
  - commitment
  - feedback
  - complexity

**Prof Michael West (Lancaster University) - Real Teams or Pseudo teams (2012)**

- Research on Real vs psuedo teams and impact on creativity, innovation and performance
  - clear shared goal
  - work interdependently to deliver their team outcomes
  - regular meetings to reflect on performance and consider how to improve performance

**Timothy Clark – The Four Stages of Psychological Safety (2020)**

Defined four stages of psych safety which increase the level of comfort of team members to contribute

- Inclusion safety
- Learner Safety
- Contributor safety
- Challenger Safety

**Psychological Safety – Amy Edmondson (2017)**

- Organizational behavioral scientist Amy Edmondson of Harvard first introduced the construct of “team psychological safety” and defined it as “a shared belief held by members of a team that the team is safe for interpersonal risk taking”.

