

Team Effectiveness Worksheet

Purpose: Quickly assess your team's performance across key areas of strength, roles, engagement, and development to identify opportunities for improvement.

Section 1: Team Strengths Assessment

Instructions: Rate each area from 1 (Needs Improvement) to 5 (Excellent). Add notes for specific examples.

Area	Rating (1-5)	Notes / Examples
Individual skills & expertise		
Collaboration & teamwork		
Problem-solving ability		
Communication clarity		
Initiative & accountability		
Adaptability / flexibility		
Alignment with business goals		

Reflection Question:

- Which strengths are underutilized?
- Which strengths could be leveraged more for business growth?

Section 2: Roles & Responsibilities

Instructions: Identify each team member and check if their **role is clearly defined**. Add any gaps or overlaps.

Team Member	Current Role	Responsibilities Clear? (Y/N)	Notes / Overlaps / Gaps
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Team Member	Current Role	Responsibilities Clear? (Y/N)	Notes / Overlaps / Gaps
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Reflection Question:

- Are any roles overlapping unnecessarily?
- Are there gaps in responsibility that slow workflow or create confusion?

Section 3: Engagement & Motivation

Instructions: Rate the team overall from **1 (Low)** to **5 (High)** for each engagement area.

Area	Rating (1-5)	Notes / Examples
Employee motivation		
Recognition & rewards		
Participation in decision-making		
Alignment with company values		
Job satisfaction		

Reflection Question:

- Which areas of engagement need immediate attention?
- How could recognition or motivation strategies be improved?

Section 4: Training & Development

Instructions: Evaluate opportunities for skills growth or mentorship.

Skill / Area	Current Proficiency	Training Needed? (Y/N)	Suggested Development Action
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Reflection Question:

- Which skills, if improved, would create the biggest impact?
- Are there team members ready to mentor others or take on leadership roles?

Section 5: Action Plan / Next Steps

Instructions: Based on your ratings and notes, identify 1–3 **priority actions** to improve team performance this week.

Action	Responsible Person	Deadline	Notes
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Reflection Question:

- What is the **first small step** you can take this week to optimize your team?