Teambuilding Needs Assessment Checklist

Learning Goals

- What changes do you hope to see in team members' behavior after the session?
- If you could improve one aspect of how the team works, what would be most impactful?
- Which competencies do you believe need strengthening, and why?
- How will you define the success of the session?

Team Dynamics & Performance

- What interpersonal challenges are currently affecting team performance?
- How do team members demonstrate trust and respect for each other?
- How would you describe the current state of communication within the team?
- How do employees perceive their individual roles and contributions to team success?
- How are expectations around collaboration and accountability communicated and understood?
- How much ownership will the team have (vs. the leader) in any solutions identified during the session?

Current Challenges

- What specific issues have surfaced recently within the team (working in silos, low morale, unclear decision-making, etc.)?
- How have recent changes, such as reorganizations, leadership turnover, or new team members, impacted the team?
- What measurable gaps in performance or engagement have you seen compared to past periods?

Organizational Alignment

- How does the team's current behavior align with company values and goals?
- How do leadership's expectations compare with the team's current operations?

Participant Readiness

- How aware are participants of the purpose of the session?
- What is the team's current attitude toward training or facilitated sessions?
- Who are the skeptics or vocal participants, and what engagement strategies might be needed for them?
- What types of teambuilding or other team sessions have been tried in the past, and what was the response?

Logistical & Strategic Planning

- What is the best format for this session (in-person, offsite, virtual), and why?
- How many participants will attend, and what are their organizational levels/titles?
- How much time is allocated for the session, and is follow-up desired?
- What is the room/facility location like? What equipment is provided?
- How can session outcomes be measured effectively (e.g. pre/post surveys, observable behavioral changes, team metrics)?

Time Tip

If you plan to use a self-assessment as part of your teambuilding session, consider assigning it as prework. This will ignite excitement and cut down on the awkward silence and perceived 'wasted time' that occurs when doing assessments during the session itself.

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Teambuilding Design



Teambuilding Toolbox

Activity	Description
Start, Stop, Continue	Put up three wall charts, one for Start, one for Stop, one for Continue. Identify the topic (communication, meetings, etc.), assign 1/3 of the team to each poster to jot down their ideas for the topic: what to Stop doing, what to Start doing, and what should Continue. Debrief by looking for common themes.
More of/Less of	Similar to Start, Stop, Continue, but uses one poster split vertically. On one side they list what they want more of as a team, on the other they list what they want less of. Topics often touch on communication, time, resources, role clarity. Debrief by identifying which would make the most impact for them to continue the discussion.
Ideal Day	Have the group brainstorm what an ideal day as a team would look like: how would work flow? How would they communicate? How would they collaborate on projects? Debrief by picking one key idea they want to focus on for the rest of the session.
5 Words	Ask each person to share a few words or a short phrase that describes how they feel about the team right now – either on a wall chart or anonymously through a polling app. Debrief by having the team narrow the chosen words or phrases down to five key words. Use these words to kick off discussions around how they can improve.
Team Charter	Great for new teams or teams going through significant change. Team clarifies expectations around their goals, their customers (internal/external), how they will work together, how they will hold each other accountable, how they will communicate together. Charter can be nicely formatted and shared out to the whole team.
Day in the Life	Reflection activity using four quadrants on a wall chart: 1. What makes us happy? 2. What motivates us? 3. What frustrates us? 4. What do we need? Excellent for surfacing issues related to leadership concerns.
Team Motto/ Bumper Sticker/ Coat of Arms	Break team into smaller groups and have them create one of the following: a team motto, a team bumper sticker, or a team coat of arms. Have each group present their creation to the other groups and look for themes for follow-up discussion.
Pick an Image	Purchase/create a collection of various random images, spread them on a table and have individuals pick one image that represents how they feel about the team. Have each person explain their choice and look for common themes to discuss further.
Gallery Walk and Vote	Great way to get the group up and moving. On any of the wall chart activities, instead of debriefing their own chart, have each group circulate to the other groups' charts. Depending on the activity, they can vote for concepts they agree with. This is a low-pressure way to identify top-of-mind topics for the group for further discussion.

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Facilitation Best Practices

- Set the tone early - prepare a warm welcome, clear agenda, and inclusive ground rules.
- Put the participants at the center of the session.
- Make it safe for them to share ideas – try anonymous polling, sticky notes, or small group brainstorming so "risky" ideas can surface.
- Talk less than they do.
- Guide the discussion with open-ended questions and active listening.
- Be curious – don't assume you know the answers.
- Debrief every activity as a group. Otherwise, activities will feel disconnected.
- Let them discover their truths – don't tell them what they should think.
- Test your tools in advance, including slides, breakout rooms, or props, to ensure everything works smoothly
- Have some activities/questions in your back pocket if the session goes where you aren't expecting
- Be ready to shift if the conversation goes a different direction - let go of your own agenda if it's not serving what the team has identified as their primary concern.
- Watch for dominant voices in discussions. Give them something else to do, such as observing for common themes, or create smaller groups that change throughout the session, so they don't dominate the entire time.
- Use energizers or breaks if the group feels flat or distracted.
- Validate concerns or resistance ("It sounds like this feels unfamiliar") and connect back to the overall purpose.
- Manage the time. Prioritize key activities and be transparent about adjusting the agenda.
- Let go of perfection! Aim for worthwhile, not perfect.

Useful Facilitator Phrases

- *To Encourage Participation*
  - "Let's hear from someone we haven't heard yet."
  - "There are no wrong answers - what's coming up for you?"
  - "Would anyone like to build on that thought?"

- *To Manage Dominance or Drift*
  - "Let's hear a few quick thoughts, then we'll circle back."
  - "That's an important point - can we park it and revisit it later?"
  - "Let's pause and check in with the group."

- *To Navigate Tension*
  - "It sounds like this topic is bringing up some strong feelings. Let's slow down and explore that."
  - "There's some discomfort here - it's okay. We don't need to solve it all today."
  - "Let's identify what's happening, then decide how we want to move forward together."

- *To Reflect & Close*
  - "What's one insight you're walking away with?"
  - "What's something you'll try differently after this session?"
  - "Who would like to share a final thought or takeaway?"
  - "How will you all hold each other accountable for your action plan?"

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Virtual Teambuilding

Virtual Design Tips

- Know your platform and play with it. Enlist a friend/colleague to be your test audience.
- Use the tools available to you, including whiteboards, polling, word clouds, reactions, and chat.
- Aim for session lengths between 60-90 minutes. Break longer sessions into modules with breaks.
- Prepopulate whiteboards so they are nicely designed and ready to go when the session starts.
- Warm up the group with an easy activity to introduce them to the tools in the software:
  - Have everyone change their background to their favorite vacation spot.
  - Have them share an emoji or gif in the chat to show how they're feeling today.
  - Create an activity where they annotate, drag objects, or draw on the whiteboard.
- Ask participants to turn on their cameras if at all possible.
- Let them have fun in the chat and come off mute.
- Alternate between discussion, visuals, polls, breakouts, and whiteboards to keep engagement up.
- Give people time to think. Use prompts like "Take 30 seconds to jot down a thought."
- Acknowledge low energy and then pivot. Say something like "Let's shift gears to something lighter."
- People are often more likely to have deeper discussions in breakout rooms than in the larger team room.
- Consider external interactive tools with care – Mentimeter, Miro, Kahoot and others can be engaging, but may tempt people to stay on other media or phones.
- Enlist a colleague to be your producer to manage chats, troubleshoot, and monitor breakout rooms.
- Have a backup plan in case of issues with virtual tools, such as breakout rooms not opening.
- Have a disconnect plan in case the platform doesn't work (email slides, switch platforms, reschedule, etc.). Let them know whether to try to reconnect or look for an email with a different link, for example.
- Have fun and be creative!

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Kelli Nottingham is a dynamic and passionate professional development trainer, training consultant, public speaker, podcaster, and business coach with 20+ in training and coaching across the U.S., Canada, the Caribbean, and Asia. She excels in developing complex ideas into engaging training content and delivering that content with an energetic and down-to-earth sensibility that gives participants both the capability and motivation to progress.

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