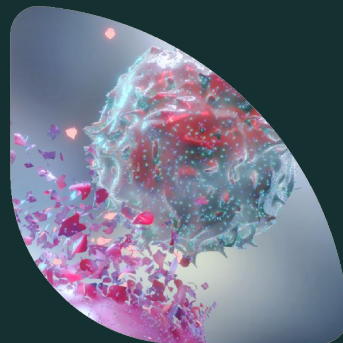




Plumtree
Services

Team Health Check Guide





What is a Team Health Check

A team health check is a simple way for R&D teams to step back and look at how they are working together. It gives the team a clear picture of alignment, connection, and teaming practices. It highlights patterns in how the team works so you can adjust before small issues grow and impact delivery.

Why is it important

Science moves fast. Teams do too. A twice-yearly health check gives the team a steady rhythm to step back and assess how well they are living into its team charter. A team health check helps team as follows:

- Surface what is going well
- Identify where the team is struggling
- Make adjustments and take action

The result is creating a highly engaged team with shared ownership, as well as, faster decisions, smoother execution, and a more resilient team that can adapt with confidence.



How to conduct a team health check

Step	Action
1. Set the Context	Tell the team that the goal is to understand how the team is working. This is not an evaluation of individuals or a blaming session. It is a chance to see what's working and what needs attention so the team stays aligned to its charter or updates it if needed.
2. Create and send the assessment	Use the simplified Team Health Check survey. Keep it anonymous to encourage honesty. You can automate the survey using: Microsoft Forms, Google Forms or SurveyMonkey. These tools make it easy to gather responses, summarize themes, and track trends over time.
3. Bring the data back to the team	Share the overall summary with patterns you see. Look for: Where the team sees strengths, where the scores spread out, which areas connect to current tensions or slowdowns. Invite everyone to describe what they see and how it shows up in the day-to-day. Facilitate with intent to make sure that all voices are heard.
4. Choose 1 or 2 areas to improve	Health checks are a zoom-out. The goal is to make clear, simple choices with shared commitment from the team. Pick the areas that matter most for the next stretch of work.
5. Run small experiments	Design one or two simple teaming shifts. Keep them small so the team can learn quickly. Examples: A clearer decision pathway, a refreshed meeting rhythm, a shared norm for how information is shared.
6. Check Progress	Check in with the team after a few weeks. Ask how the changes feel and what's improving. This keeps the work real and grounded in lived experience.



Team Health Check

Part 1: What we do as a team

	Not in Place	Early Stage	Inconsistent	Mostly in Place	Strong & Consistent
Strategy, Goals & Objectives Our purpose, strategy, and goals are clear, current, and understood by the team.	1	2	3	4	5
Expectations & Role Clarity We are clear on roles, responsibilities, and what is expected of each function and person.	1	2	3	4	5
Execution, Deliverables & Dependencies We understand what we need from each other and manage dependencies so work moves smoothly and is delivered on time with quality.	1	2	3	4	5
Meeting Effectiveness Our meetings have a defined purpose, good preparation, and clear outcomes so they support execution.	1	2	3	4	5
Communication & Information Flow Information moves across the team in a timely and reliable way so people can act decisively and with confidence.	1	2	3	4	5
Risk We identify risks early and work together to reduce impact on the work and deliverables.	1	2	3	4	5
Decision Making We are clear on how decisions are made, who makes them, and how they are communicated.	1	2	3	4	5
Stakeholders We understand our stakeholders and engage them with the right frequency so expectations stay aligned.	1	2	3	4	5



Team Health Check

Part 2: How we work together

Not in Place Early Stage Inconsistent Mostly in Place Strong & Consistent

Shared Values & Principles

We have shared principles that guide how we work together and make choices.

1

2

3

4

5

Transparency & Trust

We show trust, share openly and assume positive intent so people feel safe to speak up.

1

2

3

4

5

Navigating Tensions

We surface tensions that impact program outcomes early, discuss them directly and resolve them respectfully.

1

2

3

4

5

Giving Feedback

We give and receive feedback in a timely, useful way that helps the team improve.

1

2

3

4

5

Reflection

We make time to reflect on how we are working and delivering as a team and learn from our experience.

1

2

3

4

5

Appreciation

We celebrate progress, show appreciation and bring the right level of energy into how we work.

1

2

3

4

5

Additional Thoughts

Use this space to share additional perspectives or thoughts.



What Comes Next

The next step is turning insight into action.

As a team, choose 1-2 areas to focus on.

These should be areas that matter most for your next phase of work

Co-design simple shifts

Keep them small. Make them easy to test. Examples include:

- A clearer decision pathway
- A refined meeting rhythm
- A shared expectation for information flow
- A team norm for communicating new information timely

Agree on signals of progress

What will tell you things are improving? What will you see, hear or feel?

Check progress together

Run a short check-in during a team meeting. Keep what's working. Adjust what isn't. Embed it as part of how you work, not a one-off exercise.



Want Help?

Plumtree partners with leaders and teams to co-design their operating system that accelerates delivery. Contact us to learn more about our adaptive teaming services.

Let's explore what's possible together

732.232.6805

info@plumtreeservices.com