



Psychological Safety Action Pack

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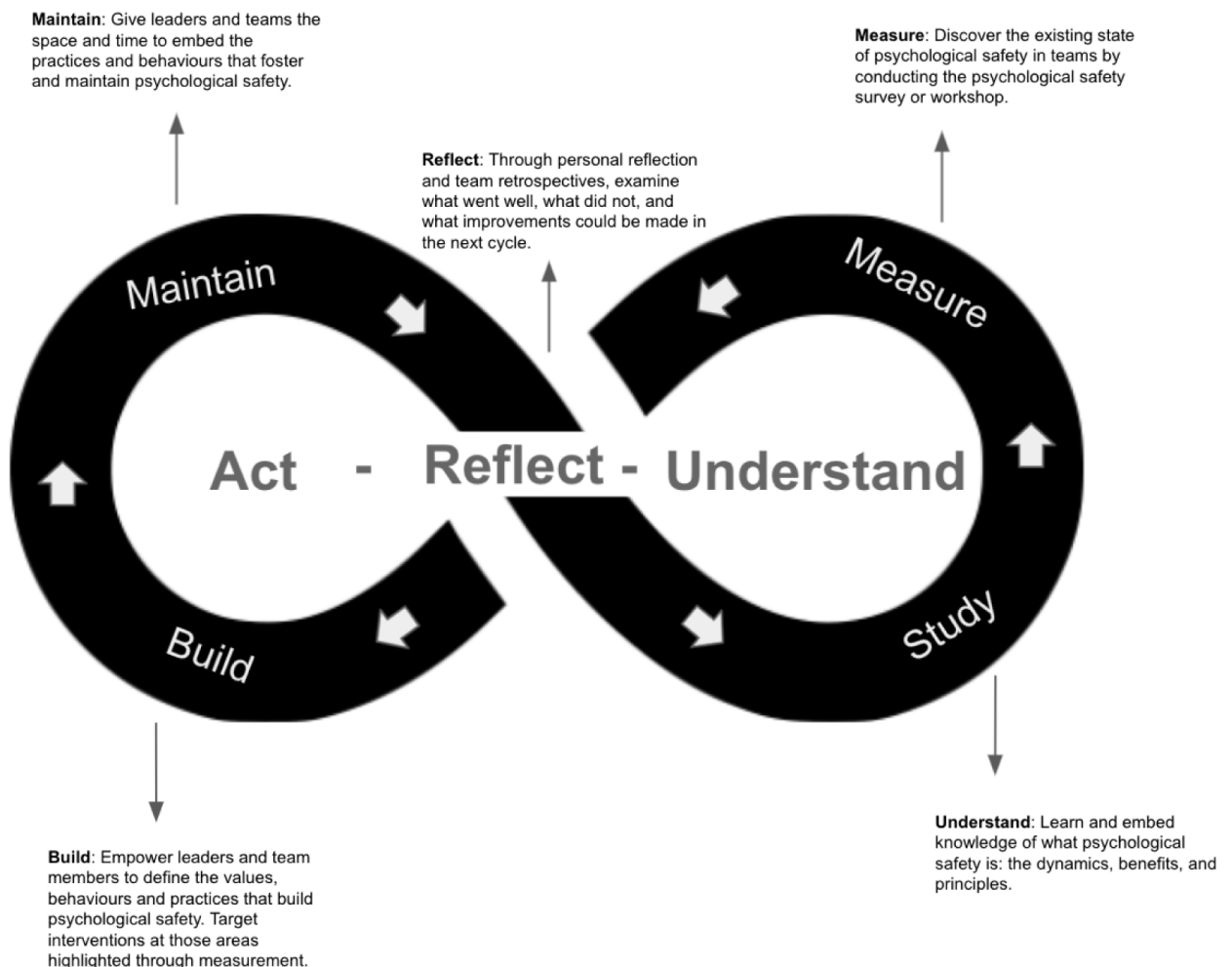
Iterum Ltd

Welcome to the Psychological Safety Action Pack.

Psychological safety is the most important factor in high performing teams, and high performing teams are happy. When people on a team possess psychological safety, they feel able to ask for help, admit mistakes, raise concerns, suggest ideas, and challenge ways of working and the ideas of others on the team, including the ideas of those in authority. Via this honesty and openness, risks are reduced, new ideas are generated, the team is able to successfully execute those ideas.

Use this action pack as a resource to measure, build and maintain psychological safety in your organisations. You may use the Six Month Planner (item 3) to develop a structured plan, or you may simply wish to use a selection of the elements to complement your existing team building and leadership programmes. This pack also contains background information, survey tools, guides, workshop templates, posters and other resources.

The Action Pack is structured around a feedback loop of continuous learning, implementation and reflection, as show below:



After reflection, you should loop back to Study, and repeat the cycle to continue improving your own capability and the level of psychological safety in your team.

Contents:

1. Contents and Introduction
2. The Case for Psychological Safety
3. Six Month Planner
4. Measuring Psychological Safety
5. Post-Survey Action Guide
6. Values and Behaviours Workshop
7. Team Performance Workshop
8. The Fear Conversation Exercise
9. Team Retrospective Templates
10. Self-Coaching and Reflection Worksheet

Additional Resources:

- A. Grace Hopper Leadership and Management Poster
- B. "The 3 Fundamentals of Psychological Safety" Poster
- C. Psychological Safety Checklist
- D. Remote Psychological Safety Checklist
- E. Tuckman's Model of Team Development
- F. "You don't have to be told you're a leader" Poster
- G. The Psychological Safety Quadrant
- H. The Fear Conversation Chart
- I. The Four Stages of Psychological Safety
- J. Organisational Culture and Westrum's Typology
- K. Mentorship and Coaching
- L. Cognitive Load and Psychological Safety
- M. In/Out Exercise

Appendix: Further Reading and References

An Introduction to Psychological Safety

First known to be mentioned by Schein and Bennis in the 1960s, psychological safety was first defined as a group phenomenon that reduces interpersonal risk. To quote Schein and Bennis's paper "Personal And Organizational Change Through Group Methods : The Laboratory Approach" in 1965, psychological safety reduces "a person's anxiety about being basically accepted and worthwhile". Deming, in his 14 Points for Management, also raises the point of reducing fear of interpersonal risk taking in point 8: "Drive out fear, so that everyone may work effectively for the company". This highlights a growing change in sentiment at the time, away from reductionist and Taylorist views of workers towards a more progressive paradigm of empowerment and engagement to improve business outcomes.

In 1986, the Chernobyl power plant suffered a major disaster that directly killed 31 people and is estimated to have indirectly killed over 4000. Whilst the plant itself possessed an inherently unsafe design, the culture in Russia at the time did not encourage the raising of concerns or speaking up about mistakes. A fear of authority and the need to please political masters resulted in a fear-driven culture. During a simulated power shutdown, operators who were not fully equipped to deal with the situation made a series of protocol mistakes which resulted in a steam explosion, followed by a nuclear explosion. The cause of the disaster was in large part because operators did not speak up about their concerns.

William Kahn, in 1990, renewed interest in psychological safety with his paper "Psychological Conditions of Personal Engagement and Disengagement at Work" where he described psychological safety as the ability for someone to "employ or express themselves physically, cognitively, and emotionally". At the same time, progressive management paradigms at the time such as safety culture and the Toyota Production System (TPS) were emerging that introduced concepts such as the Andon Cord, which empowers employees to raise issues or concerns around safety and process (which is exactly what Paul O'Neill did).

In 1999, working on the paper "Psychological Safety and Learning Behavior in Work Teams", Dr Amy Edmondson was studying clinical teams and the number of mistakes that different teams made. During her research she was surprised to find that the teams with a higher number of good outcomes actually made more mistakes than teams with fewer good outcomes. It was a surprising result, but after further investigation, Dr Edmondson discovered that in fact those teams with better outcomes were admitting more mistakes, whilst the teams with fewer good outcomes were more likely to hide theirs. As a result, Dr Edmondson codified the concept of psychological safety, namely: the belief that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes. She believed that psychological safety was a key factor in team performance.

Google's Project Aristotle was led by Julia Rozovsky in 2013 and demonstrated psychological safety to be the most important factor in high performing teams. The Project Aristotle team uncovered four key factors (Dependability, Structure and Clarity, Meaning, and Impact) that are essential to team performance, but it was clear during the research that there remained one or more missing elements. The team discovered Edmondson's 1999 research and applied the paper's methodology to measure psychological safety. The

results showed that “even the extremely smart, high-powered employees at Google needed a psychologically safe work environment to contribute the talents they had to offer”.

Google’s Project Aristotle was a turning point for psychological safety. It was enough proof for what we all intrinsically know – that feeling safe to be yourself as part of a team, where you’re able to contribute your ideas, admit mistakes, challenge others respectfully, and try without fear of failure, is one of the most powerful aspects of human performance.

Similarly, the 2019 and 2021 “State of DevOps” reports consistently show that psychological safety is an essential and foundational factor in software delivery team performance, and also to organisational performance more widely.

Let’s relate this now to your own experience. Think about the best team you’ve been a member of. It could be a sports team, a business team, or some other group of people with a shared goal. Being a member of that team probably felt good, it may have even been energising and inspiring. Whilst the members of that team may well have been experts in their field, it’s likely that being a member of that team felt good because that team felt safe to be themselves. They, and you, likely felt free to admit mistakes, ask for help, and even challenge ideas from other team members without fear of humiliation or embarrassment.

Now think about one of the worst teams you’ve been a member of. Perhaps you felt that you had to put on a metaphorical “mask”, and be a different version of yourself in order to fit in. You may not have been able to admit mistakes, or ask for help, in case members of the team saw it as a weakness and used it against you. Chances are, you didn’t feel very “safe” in this team.

Think of these two teams when thinking about levels of psychological safety. Psychological safety isn’t a binary “on or off” factor, it’s a sliding scale. Teams (and members of those teams) possess it to varying degrees. The best team you’ve been on probably possessed a lot, whilst the worst probably did not possess much at all. This pack will support you to increase the psychological safety experienced by your team right now.

Leadership vs Management

At times through this action pack, we will refer to both “leadership” and “management”. It’s important to recognise the difference between these two practices. The indubitable Grace Hopper once stated that “You manage things, you lead people.” What she meant is that management consists of all the processes, tools, and controls that need to exist in order for people to work effectively, whilst leadership is far larger in scope and consists of, for example, setting direction, making strategic decisions, supporting and motivating people, and elevating people in order to reach their highest potential. (See Grace Hopper - Management and Leadership (item A))

In practice, this means that neither management nor leadership can be neglected. In order for people to perform well, they need to operate in environments where safety, costs, tools and processes are managed effectively. A team cannot deliver if they do not know how, or indeed what to deliver. Management is therefore part of leadership, and contributes to the

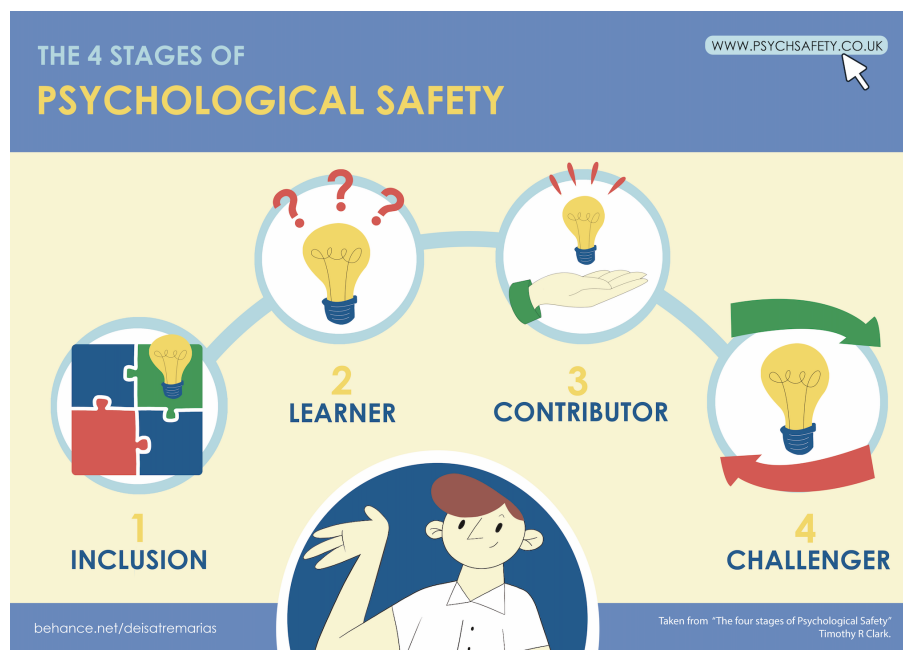
“structure and clarity” that Google’s Project Aristotle defined as the third most important factor in high performing teams.

The Four Stages of Psychological Safety

Timothy R Clarke in his book “The Four Stages Of Psychological Safety” describes a model of four “stages” of psychological safety that teams can move through, progressing from stage 1 to stage 4.

These are:

1. Inclusion Safety - members feel safe to belong to the team
2. Learner Safety - members are able to learn through asking questions
3. Contributor Safety - members feel safe to contribute their own ideas
4. Challenger Safety - members can question others’ ideas or suggest significant changes



Whilst “all models are wrong, and some are useful” applies in this case (people do not move linearly through stages 1-4, nor do the stages exist in discrete reality, The “four stages” can be a useful model to reinforce the point that psychological safety is not a binary “on/off” phenomenon: we all move through different degrees of psychological safety in different teams, contexts, times of day, etc.

Another useful model for team development is Tuckman’s Model of Team Development (item E), where teams “Form”, “Storm”, “Norm”, and finally, “Perform”. It is only in psychologically safe teams that true performance will be reached, since this stage requires the ability for team members to admit and learn from mistakes, and to contribute and challenge ideas. Reaching this stage, as a leader of a team, is your goal.

The Three Fundamentals

There are three core leadership behaviours (The Three Fundamentals of Psychological Safety (item B)) which support psychological safety in teams (Thanks to Dr Amy Edmondson for distilling these in “The Fearless Organization”). These may seem simple, but in practice they extend to every single leadership behaviour and every single aspect of communication. Those three core behaviours are:

- **Framing work as a learning problem**, not an execution problem. The outcome of work should not exclusively be the output; it must also be learning how to do it better next time. Everything Is An Experiment.
- **Acknowledging your own fallibility**. By admitting when you make a mistake or don't know the answer, you allow (indeed, encourage) others to do the same.
- **Modelling curiosity and asking questions**. Stay curious, ask other people what they think, and ask them to contribute. By asking questions and asking for help, you're creating a space and a need for people to speak up, which is essential for psychological safety and for high performing teams.



I hope you get a lot of value from this action pack, and enjoy the process.

For assistance running workshops, or for further information about concepts introduced in this action pack or anything else, please get in touch: tom@psychsafety.co.uk

If you have a few minutes to spare to provide feedback and improvements to the action pack and its contents, please do so [here](#).

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