



## **Teamwork & Renewal Case Study #1**

### **Background**

A financial lending company, gearing up for its best year ever, wanted to solidify relationships with new and existing team members and increase the efficiency and effectiveness of working together. Opportunities were present to standardize processes and documenting approaches in order to help individuals leverage each other's talents.

### **Goals**

To continue to build a highly efficient, cooperative, compatible, cohesive and goal-oriented team in sync with operating in a profitable manner.

- Build better team and individual connections
- Improve team function and communication through positive team relationships
- Demonstrate empowerment and enhanced productivity
- Flex capability to embrace growth

### **Approach**

#### *Needs assessment*

- Interview of CEO and executive team for goals and outcomes
- Survey of team members for perceptions of key result areas and opportunities for development

#### *Program development and facilitation*

- Development of a teambuilding event that incorporated critical success factors in teams
- Facilitation of program that included utilization of a Personal Interaction Profile with strategies for understanding each others decision-making styles and how to enhance communication
- Utilization of team function assessment and gap analysis to further identify opportunities

#### *Development of action plans to address identified process opportunities*

- Development of team charter and follow-up strategies
- Individualized follow-up support

### **Outcomes**

- Development of systemized approach for coordination of activities, standardized processes, clarity of roles, and documentation procedures
- Enhanced communication processes that provide opportunities for crucial feedback and embrace differences
- Team charter that reflects interaction preferences and supports optimal work practices
- Specific teamwork support identified for helping the company accelerate growth and be successful