

Customer service team identity day

Overview

All teams – and customer service teams are no exception – need to step back periodically and think about direction, where they have been and where they are going.

If a team is giving cause for concern, whether subjectively in terms of perception or more objectively in terms of its performance metrics, it may well be that the team is not functioning as well as it could with its existing resources. If there is no shared sense of purpose – no vision, no mission – then it is all too likely that energies are not being properly directed, that inefficiencies are arising and that the team is failing.

Equally, a newly formed team – or a recently restructured one, or a rapidly expanding one – needs to focus first on the bigger picture before it can get down to the job of service delivery.

In situations such as this, a team identity day can be invaluable, helping the team establish a sense of direction, of purpose, of identity.

Objectives

The day usually has two very specific outcomes. First, a draft (or revised) vision and mission statement, sometimes expressed as a 'Team Charter'. And secondly, an agreed set of next steps.

Individual participants tend to come away from the event inspired and motivated, with an increased sense of purpose and commitment and a better understanding of their own role as well as that of the team as a whole.

The net result is invariably an improvement in performance. Our raison d'être.

Who should attend?

This very flexible programme works with teams at all levels, from front-line staff right up to the Board. It works particularly well with service delivery teams (including internal services such as HR, finance, IT helpdesks) and with newly created teams (eg, following a restructuring) but is appropriate for any team that needs to take a step back and think about its role within the organisation, by creating a draft team vision and mission that will ensure consistency in approach across all clients and stakeholders in the core aspects of its role.

Format

This is very much a facilitated session, so a successful outcome requires the active participation of all those involved.

To get the most from the day, it is essential that it is completely tailored to the team. The lead stakeholder for the event (whether that's the team leader or a more senior line manager) should engage with us in advance to brief the facilitator on the background – the role of the team, the organisational context, the profile of the team members, particular areas of concern or identified scope for improvement, etc, etc. The agenda for the day can then be revised as necessary.

Expert facilitators

A number of our customer service trainers are also expert facilitators. The more obvious candidates for the role would include [Scott](#) or [Amanda](#) – give us a call and we can discuss who would be the most appropriate facilitator for your particular team (or location).

Any questions? Please just give us a call on 01582 463464 – we're here to help!

Or visit www.thecustomerservicetrainingcompany.co.uk

© The Customer Service Training Company / the trainer

Feedback

See what participants have said about our 'Customer service team identity' sessions:

'Great experience, very professional.'

'Learnt to work together as a team.'

'A succinct half-day course which has put our objectives and obstacles into perspective – loved the scrabble activities!'

'Managed to learn about myself and the team.'

'Enhances team confidence and belief – does what it says on the tin.'

'Very enjoyable and good rapport.'

Workshop outline

1 Introductions / scene setting

- Why are we here?
- What do we all want to achieve?
- What will be important to ensure we get the most from the day?

2 Beginning the journey to team identity

- In what way we do we operate as a team now?
- What examples do we have of working well together?
- What are some of our biggest practical challenges in working together?
- Team SWOT analysis

3 Who are our competitors?

- Internal and external? (Depending on context)
- Can they provide a better service than us?
- What are the consequences for us as a team?

4 Team perception

- How are we perceived by the business?
- How are we perceived by our clients / customers / end users?
- How do we see ourselves?
- How do we see ourselves in the future?

5 Added value

- What is added value?
- How can we provide it?
- Are we focusing on the right things?
- Want v need v expect

6 Our team identity

- Who are we and what do we do?
- Why does our team ultimately exist?
- What are we here to deliver?
- Who relies on us?
- Who do we rely on for success?
- What consistencies in delivery must we demonstrate?

7 Our vision for success

- What is a vision?
- Why do we need a vision?
- What is our draft vision statement?
- What is a mission?
- What is our draft mission statement?

8 Review

- What is our team vision?
- Do we have clarity about our team identity and approach?
- What is our team charter?
- What are some of our immediate next steps?

Any questions? Please just give us a call on 01582 463464 – we're here to help!

Or visit www.thecustomerservicetrainingcompany.co.uk

© The Customer Service Training Company / the trainer