

Effective team working at CFS

The Co-operative Financial Services (CFS) is part of The Co-operative Group – the UK's largest consumer co-operative with more than 6.5 million customers. CFS offers a range of financial products and services from high street and internet banking services to pensions, unit trusts, insurance and financial advice.

The Situation

In August 2009 the Britannia merged with Co-op Bank and in 2010, with the intention of bringing together the newly emerged teams behind a common purpose, Oakridge Training and Consulting was brought in to deliver a team effectiveness programme to the senior executive team.

Our Contribution

Oakridge recommended following the Hackman model of Team Effectiveness to ensure a successful transition which would enable the team to become valuable, focused and high performing members quickly.

The **co-operative** financial services

The delivery proposed by Oakridge was more than just a programme or event. Oakridge's development work combined processes, tools and concepts - based on research-driven methodology which includes a set of conditions - that team leaders need to put in place for effective high team performance.

Oakridge's approach to team development helps clients work towards a national or global approach where agreed principles and resources are applied consistently. It:

- enables all involved to follow best practice approaches
- provides a common language and expectations
- ensures teams can continue to reinforce and use learning
- enables teams understand how to engage
- helps achieve consistency.

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Programme Delivery

The CFS Team Effectiveness Programme followed Hackman's team conditions model and covered aspects of the 14 key areas with on-going support provided by the HR Business Partners. There were a range of aims which were dependent upon the teams and their requirements such as 'understanding and then agreeing the main purpose of the Team', 'building a picture of what good looks like for this leadership team' and 'outlining barriers and enablers'.

Each team followed the same programme to ensure a robust diagnostic, effective team event and clear feedback and evaluation. It included:

- two hour consultation with team leader to agree priorities, focus and evaluation
- half day launch/diagnostic with team
- two hour follow up with team leader to provide feedback. Re-contract, scope the main event and provide coaching if necessary
- one day team effectiveness event
- two hour consultation with team leader to provide feedback, agree on-going process and success criteria, support required and further coaching if required.

Results

The programme delivered several critical elements and participants felt that there had been a change of mindset with an agreed purpose now existing and the creation of ground rules for working together and with their customers.

It was also felt that the team could now take the lead and present a more proactive approach - supporting each other, mentoring each other, a more open communication and dialogue existing. Feedback also reported very powerful improved effectiveness in the organisation with a clear picture of a 'one team' approach to issues no matter who runs it.