

EFFECTIVE TEAM WORKING AT CFS

THE BACKGROUND

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.

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 APPROACH

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.
- improves the performance and productivity in a sustained way
- supported the integration of two cultures

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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 CFS Team highlighted the following as a real benefit of the programme:

- Improved its internal workings and the management of its stakeholders
- Strengthened interpersonal trust to help them get to know each other better
- Improved confidence to continue working at a high level
- Enabled time together to discuss key issues other than business updates
- Clarified objectives to enable them to be more organised and aligned behind objectives and plans
- Helped them to achieve great improvements around performance, OD, cost performance, customer satisfaction, sustainable bank and arrears

Brigit Egan said:

"We worked with the leadership teams on the fourteen key indicators proven to drive team excellence. We supported teams across every area of the business including finance, retail, operations, risk, actuarial services, IT operations and development and shared services."

