ACTION ITEM

1a. FINALIZE OUR TEAM VISION

PURPOSE
Define where your team is going and why you are going there.

TIME
60 minutes

Invite your team to finalize the draft team vision statement you created during the module.

INSTRUCTIONS:

1. Share the purpose of a team vision statement: It explains where you're going—the rallying point for people to give their finest and best efforts.

2. Share your draft team vision statement with your team.
   - Explain your thinking and the vision statement's importance.
   - Ask for feedback and take clarifying questions.

3. Engage your team to get their input and ideas.

4. Work together to finalize your team vision statement. Refer to the "Team Vision" card (1) to make sure your team vision is inspiring.

▶ Watch the video *We Choose to Go to the Moon* with your team.
   - How can our vision inspire our team?

TIPS: Finalizing your team vision and strategy is a great activity for an off-site team retreat. Share the questions in advance to give team members time for reflection and analysis.

SUGGESTED COLLABORATION METHOD:
MIX-PAIR-SHARE OR STORMBOARD.

ACTION ITEM

1b. FINALIZE OUR TEAM STRATEGY

PURPOSE
Finalize the strategy that will help your team achieve their vision.

TIME
60–120 minutes

Invite your team to work together to finalize your team strategy. Revisit and revise your team strategy annually or as needed.

INSTRUCTIONS:

1. Share the purpose of a team strategy: It explains *how* you are going to achieve your vision in a way that meets stakeholder needs.

2. Share your draft team strategy with the team.
   - Explain your thinking and the strategy's importance.
   - Ask for feedback and clarifying questions.

3. Engage your team by asking them for their input and ideas. Use the Relevant Team Strategy tool as needed.
   - Customer-Needs Analyzer
   - Team-Capabilities Analyzer
   - Strategic-Context Analyzer
   - Bottom-Line Analyzer

4. Finalize your team strategy.
   - Review the Relevant Team Strategy tool and work together to finalize your team strategy.
   - Work as a team to finalize your team-strategy language.

Watch the video *Copa Airlines* with your team.
- How can our team's vision and strategy link to the organization's?

RELEVANT TEAM STRATEGY

Explore how to increase your team's relevance.

CUSTOMERS' NEEDS

Who are your most important internal and external customers? What do they want or need from you?

TEAM CAPABILITIES

What does your team do best? Where are the gaps?

STRATEGIC CONTEXT

What organizational strategies do you need to link to? What other factors do you need to understand and consider?

BOTTOM LINE

How does your team add value? How do you impact the bottom line?

Our Team Strategy

INSTRUCTIONS
Use the template below as a guide, or use a flip chart to freewrite your
team strategy.

Team Name:

We serve (customers):

By focusing on:

We help our customers achieve (desired results):

This will help our organization achieve (mission, vision, strategy):

And drive our business model through (cash, margin, velocity, growth):

SUGGESTED COLLABORATION METHOD:
FLIP CHART/WHITEBOARD OR GOOGLE DOCS

Team Strategy EXAMPLES

GLOBAL OPERATIONS TEAM, MANUFACTURING COMPANY

We serve sales offices worldwide through a lean and flexible global manufacturing system to achieve their expansion targets. We also enable our company to increase market share, enable sustainable growth, and double profitability over the next three years.

CREATIVE-SERVICES TEAM, PRODUCT COMPANY

We provide creative expertise to other teams to help them develop world-class products. By doing this, we help our organization launch great products and drive the organization's economic model through speedy support and creative excellence, establishing a world-class brand.

REGIONAL SALES TEAM, PHARMACEUTICAL COMPANY

We support healthcare professionals in our region through expert education and research on 12 target drugs so they can make educated choices when prescribing. By increasing the prescription percentage from 65 percent to 75 percent in the next year, we will drive growth and increase revenue by over $30 million.

PROJECT TEAM, IT COMPANY

We help internal project managers and department heads meet their unique business objectives by building custom software. By doing this, we help our organization increase its efficiency and productivity, and achieve its goal of reducing annual operating expenses by $2 million.