



NEW LEADER GUIDEBOOK

PART 2: **CREATING A TEAM MISSION**

Roundtable exercise to craft your team mission statement and propel your team forward

ABOUT THIS GUIDEBOOK

Now that you've established your leadership vision ([access Part 1 here](#)) and spent some time with your team, it's time to bring the team together to develop a shared mission. This guide will help you conduct a mission building session.

What does a team mission do for you?

One of the most important aspects of a great culture is a sense of shared purpose. You see this in the most high-functioning teams. Establishing a team mission helps your team build a shared purpose and a sense of belonging. Why do you need to create a sense of belonging? In short, it makes your team better, your job easier, and it dramatically impacts the company's bottom line. Check out the stats from [this Harvard Business Review study](#):

"High belonging was linked to a whopping 56% increase in job performance, a 50% drop in turnover risk, and a 75% reduction in sick days. For a 10,000-person company, this would result in annual savings of more than \$52M."

Having this mission readily accessible becomes especially useful as your team evaluates priorities. They'll feel focused and empowered to find creative ways to achieve the mission. It allows you as a leader to give direction rather than directives. Your team mission will also help you communicate your value to the broader organization.

With this guidebook, you'll create a mission that brings your team together and gets them fired up to achieve their goals.

What you need:

- Your team
- You acting as a facilitator or a 3rd party facilitator
- A whiteboard & markers
- A scribe
- 1-2 hours (depending on team size)

What you'll find in this guide:

- Facilitator Introduction
- Mission Value Discussion
- Whiteboard Discovery Exercise
- Sample Q&A
- Reviewing & Drafting Your Mission (with examples)
- Next Steps

TEAM MISSION Roundtable Guide

FACILITATOR INTRODUCTION

Gather your team for a roundtable discussion. The purpose of the discussion is to walk away with a team mission statement.

Facilitator

Today we're going to do an exercise to strengthen how we all work together and create a mission for our team.

I want us all to agree that this is a safe space for openness, idea sharing, and collaboration and that we all agree to support each other the best we can. We will all presume that everyone is speaking with positive intent and not intending to cause offense. Do you agree?

Have everyone say "yes" aloud. You're setting a standard of team interaction of which you must be a champion. And it's something that if nurtured properly, becomes a natural part of your team interactions.

Note: If you find in the group that there is an over-sharer making it difficult for everyone to be heard, be sure to moderate the conversation to give the others a chance to participate without interruption.

Facilitator

Great! Let's get started.

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MISSION VALUE DISCUSSION

There is no documentation or scribing needed for this part of the discussion. This is a warm up to help everyone open up and establish the significance of the session. If the team is not already familiar with each other, you should start with brief introductions and/or an icebreaker exercise.

Facilitator

Is everyone familiar with what a mission statement is? Our company's mission statement is "..."

If you do not have a company mission or vision statement then describe the overall mission of the company.

Why do you think we need to have a team mission?

To draw out additional discussion on the team mission, follow up with these questions:

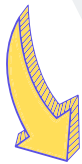
- How do you think it helps us?
- What does it do for us as a team?
- How will it impact you individually?
- How will it enable you?
- What do you think will happen when other departments see our mission?
- Have you ever been on a team where there was a well established team mission? What did you think?
- Have you been on a team before where the mission was unclear? What happened then?

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WHITEBOARD DISCOVERY EXERCISE

Have the scribe set up the whiteboard in three sections:

1 **Function:** What are the functions of our team?



2 **Value:** Who do we help? Why are these functions important to us and to those we help?



3 **Impact:** What are the outcomes we drive for the business?

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WHITEBOARD DISCOVERY EXERCISE

Tips:

- Ensure that each person has a chance to contribute. It's important to ask probing questions to dig deeper.
- Engage people who are hesitant to speak up. You can say something like "What are we missing? What are your thoughts on that?"
- The scribe should write down key words and phrases off to the side as you go as they may end up being part of the mission statement verbiage.
- If the conversation starts to steer towards problems/roadblocks, let the team know that discussion on roadblocks to succeeding in the mission will come next, but first the mission needs to be established. It's ok if the mission feels a bit idealistic at first.
- Allow for awkward silence to draw out additional input and feedback.
- MAKE NO ASSUMPTIONS! Challenge the assumptions you have in your head about what someone is saying by asking clarifying questions.
- You want your mission to be simple and clear.

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WHITEBOARD DISCOVERY EXERCISE

Work through the discussion questions below to fill in sections 1, 2, and 3 on the white board. The team may not have immediate answers to the white board sections and these discussion questions are meant to draw out thinking in these terms. As your scribe writes each item, seek confirmation that you've interpreted it correctly. It's about your employees perception of their role and impact on the business and you want to capture in their words.

Facilitator

1. What is your role and what does it mean to you?
2. What aspect of your job gives you the most satisfaction? Picture yourself on the way home or winding down after work. What would make you say '[blank] made today a good day' or '[blank] made me feel good about work'.
3. Who do we help and what are they able to do because of us?
4. What's important to those that we serve?
5. What are the goals of the business?
6. How do our contributions help the business?

Examples of Probing Questions:

1. What else can you tell me about that?
2. How specifically do you help?
3. What sort of impact do you think that has?
4. Can you elaborate on that for me?
5. What do you think is the best-case scenario?
6. What are the long-term effects?
7. What are the intangible effects?
8. What else?
9. What are we missing?

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SAMPLE Q&A

Facilitator: What is your role and what does it mean to you?

Dave: I'm a Sales Support Rep, and to me, it's really an all-encompassing thing that involves helping sales in any way I can. Mostly I'm processing and editing sales orders for them so they can send them to the customer.

Scribe: In Section 1 Function, write:

- process sales orders
- edit sales orders

Facilitator: You mentioned helping sales - how do you help them?

Dave: We help sales so they can get their orders in on time and get paid and the customer can get their services correctly.

Scribe: In Section 2 Value, write:

- sales - so they can get their orders in on time and get paid
- customer - so they get the correct services in a timely manner

Facilitator: How does this help the business?

Dave: Helps make sure we get money coming in, helps orders get processed quickly, and makes customers happy so that they want to keep doing business with us

Scribe: In Section 3 Impact, write:

- customer retention
- decreasing time to close a deal
- great customer experience

You: What aspect of your job gives you the most satisfaction? What makes you say '[blank] made today a good day'?

Dave: Being able to complete all my orders on time or solve a problem for a sales person so they can meet their goals

Scribe: In Section 2 Value, write:

- complete orders
- solve problems for sales

REVIEW & DRAFT YOUR MISSION

Now it's time to review what you've filled in on the board and discuss what's most important.

Facilitator

Take a minute to reflect on what we've written here. *Pause for several minutes.*
What do you think is the most important here? Where are we trying to go?

The Scribe should notate the highest priorities for the team.

***IMPORTANT* Leader Reflection:** *What things do you as a leader want to point out as it relates to the value the team provides to the business? Teams crave this type of feedback from leadership. Did they miss anything that they might not be aware of? Do they need additional context on anything? This is the time to reflect on what they've come up with and guide the direction for a mission.*

Now it's time to draft the mission. The scribe should document the following as the leader guides:

Facilitator

Our mission is to... *[state the highest priorities that the team needs to accomplish]*
So that... *[state the impact to the business/stakeholders that you want the team to focus on]*

This section may include some debate and its best for the leader to establish consensus with the team.

OUR MISSION IS TO...

What are you enabling?

SO THAT...

What does it mean for the business?

REVIEW & DRAFT YOUR MISSION

EXAMPLES

Here are some sample team mission statements to get you thinking:

Sales Support Mission: Our mission is to provide accurate, timely sales orders to speed up the sales cycle and deliver a great experience to our reps and customers.

In this example, it's important for the team to be accurate and quick - that's what customers need and it's also what helps sales deliver value to the business. The team decided to focus on the rep and customer experience as their greater purpose because they can see that feedback in real time as they work. The leader reiterated the importance of the sales cycle speed to senior leadership so the team will focus on that as well.

Customer Service Mission: Our mission is to provide delightful customer service on every interaction so that our customers stick around for life.

In this example, it's important for the team to provide delightful customer service because that is what's important to their customers and aligns with their company's brand. It's also critical that it happens on every interaction. This team will be doing its part to keep customers around for life.

Field Marketing Mission: Our mission is to understand and align with the local needs of sales to deliver high-quality leads and outstanding marketing support so that sales can find and close more deals.

In the above example, that division of the marketing team serves Sales. And it's important to sales that they get leads from marketing. But not just any leads. They need to be high quality so that sales isn't wasting their time. This team also strives to provide sales with the support needed to do their own marketing.

Look up your company's mission or vision statement for inspiration as well. Yours should align with the tone and priorities of the company as a whole.

**Our team
mission is:**



NEXT STEPS

WHAT DO YOU DO WITH YOUR MISSION STATEMENT NOW?

Your follow-up is critical! This can't be an empty exercise. The next step is to implement the mission.

- Make it visible: open with it in team meetings, post it around the office, communicate it to other departments
- Revisit it quarterly or bi-annually to assess its relevance
- Use it as the basis for structuring goals
- Conduct future roundtable discussions relating to your mission

FUTURE ROUNDTABLE DISCUSSIONS:

1. Review duties in relation to the mission: Are these tasks getting us closer to achieving our mission?
2. What goals and metrics can we put in place to help us achieve our mission?
3. What roadblocks are getting in our way?

YOU GOT THIS

Time for your team to enjoy the sense of shared purpose in achieving goals!

Keep your mission close so everyone can align priorities to what matters most to the business.

FEEDBACK & QUESTIONS

I'd love your feedback.

Send your mission statement or any thoughts or questions you have about Part 2 of this guidebook to jane@receptiveleader.com

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Thank you for investing in great leadership.

-Jane