



## Case Study

### Teamwork within Outsourcing - Importance and 8 Practical Steps

Outsourcing is a reality for many companies with limited capital and the need to reduce costs and/or focus more on core competencies. Gaining the support from the key stakeholders of both the buyers and providers of out-sourced functions is paramount. That support increases business results and develops teams that know how to work collaboratively with all internal and external constituencies.

While working for a large national bank, my teams performed a treasury services function for corporations and non-profits of all sizes. One company alone had over ½ of their check payments come through the bank amounting to more than \$11 billion a year! Being called to steward these funds, large and small, was a privilege and a challenge we eagerly undertook and at which we excelled.

An 8 step process focusing on each organization's goals and the strengthening of cross-company collaboration helped lead the way. The result was effective teamwork and strong confidence by our client that we could handle this critical process smoothly.

During the sales process:

1. Sales officers regularly included operations associates from both organizations in tours of our operations facilities. Along with the tours, meetings were held on site between the potential client and the operations team to begin building the relationships, explain the system's capabilities and understand the client's needs and expectations.
2. We made sure that the client's staff understood that from our perspective, although we were paid by different organizations, in spirit and in behavior we would act as if our offices were next door and as if our payroll checks came from the same employer. We wanted our counterparts to know we were fully committed to excellence and to exceeding all their expectations. Their success was our success!

After the sale:

3. We formed an implementation team that included representatives of key stakeholders such as the client, sales, consulting, operations and technology. The teams collaborated, set challenging goals and an inspiring vision, managed the change pro-actively, and utilized open communications and great teamwork. A key on-going focus was "how to create a smooth implementation".

4. Project plans were implemented and adhered to in order to track the implementation process.
5. Where possible, site visits to the client's offices were made by operations staff to meet the staff, tour their operations and better understand their requirements.
6. Proper test plans were developed and implemented to ensure the client's requirements were met. Based on test results, adjustments to processing instructions and systems were implemented where appropriate.

Post implementation:

7. Once processing went live, a report card was generated and discussed with the client in monthly meetings to keep the focus on responsiveness, commitment and continuous improvement.
8. Where necessary, daily contact with the client occurred to resolve any problems.

This collaborative process from pre-sale to post implementation created very satisfied clients and established friendships that continue till today. As we used to say at the bank, the quality of the implementation sets the tone of the relationship for the duration. A poor implementation uses up most if not all good will. A very good implementation adds to goodwill which helps when normal human mistakes occur.

You too can have similar results with your external partners. Go for it. It is worth it!

Are you in the middle of establishing an outsourced relationship? Do you have one that needs strengthening? Try some of the items listed above. You will increase results and develop teams that will know how to work well as a team and collaboratively with all internal and external constituencies.

If you would like a free Executive Management Assessment with me to discuss how I can help you achieve the greatest success possible, please call me or email me and we'll get clear about the best immediate next steps for the success of you and your team.

Bob Reissiger

REISSIGER Coaching

Bobr@coachingthecompellingway.com

[www.coachingthecompellingway.com](http://www.coachingthecompellingway.com)

770-279-9965

