

Overview

When employees are isolated regarding their exposure to and knowledge of the departments outside of their own, one employee may not understand where to go to solve a problem outside of his or her area or an employee may not understand how his or her actions or errors will affect others. In this course you will learn about the other teams within your department and how, by communicating more effectively and working together, each team contributes to the success or failure of the entire department.

Course Objective:

To broaden the participant's understanding of his or her job functions relative to the organization.

This is a 6 hour course.

This course may be applied at various levels within the Firm. This course focuses on the initial, non-management department level training as it is applied to the Escrow Administration Department. The class will bring together employees from each of the teams (Escrow Analysis, Tax, and Insurance) within Escrow Administration. The class will separate into groups where they will collaborate and participate in learning activities and answer a series of questions. The class requires a minimum of two participants representing each Escrow Administration team. Additional participants can easily be accommodated by creating additional breakout groups, as long as each team is represented in each group.

Assessment

Final grades will be a combination of the following:

- Participation (25%)
 - You must participate in all group discussions and contribute your insight and knowledge to all activities.
- Your Personal Story (10%)
 - Your personal story should be well thought out and provide insight about how teamwork and communication is important to the success of the department.
- Final Report (65%)
 - Your final report should be well thought out and clearly written using correct spelling and grammar.

Grades will be emailed to you after the course.

Version

Overcoming Departmental Barriers
Escrow Administration v1.0
Facilitator Guide
July 16, 2008
Author: Gregory Lea

Course Preparation

Prior to the start of the course you will need to do the following:

- Print a participant guide for each participant
- Print this guide for the facilitator
- Copies (one for each group) of the following template to be distributed during the course:
 - Report Template

You may choose to provide the templates for the course activities electronically. If so, each participant will need access to the following:

- Computer
- Internet
- Email
- MS Word

Ensure that the classroom has the following:

- White board w/markers
- Facilitator PC
- LCD projector
- Pen & paper

Send an email one week prior to the course asking each participant to read two of the following articles:

- <http://www.articlesbase.com/team-building-articles/the-importance-of-teamwork-381813.html>
- <http://www.buzzle.com/articles/small-group-communication-effective-team-communication.html>
- http://www.excellence2.com/communications/How_To_Support_Your_Leader.shtml
- http://www.excellence2.com/communications/Why_We_re_Afraid_to_Speak_Up.shtml
- <http://www.nkarten.com/teamwork.html>

Participants must reply to the email before the start of the class with brief (250 words or less) summary of what they learned.

Course Introduction

In the mortgage servicing business accuracy and timeliness are extremely important. We must adhere to government regulations that require both accuracy and timeliness or face stiff fines. Additionally, we earn a significant portion of our revenue from mortgage funds that we hold for 3-7 days. It may not seem like much at first but seven days of interest on a \$1,000,000 payoff is over \$1000. Teamwork is important to ensure that departmental responsibilities are completed accurately and on time and mistakes and losses are minimized.

Activity: Digital Story <http://tbd>

1. View the digital story Overcoming Departmental Barriers. Your instructor will play the digital story for the class. Be prepared to tell your own story to the class after you watch the digital story.
2. Provide 10 minutes for the participants to think about what they will say. Each participant will relate a story about how his or her job performance benefited by working closely with a co-worker outside of their team.

Learning Objectives

1. Describe how inter-team cooperation has benefited your performance at the Firm in the past.
2. Describe the purpose of the each team in your department.
3. Summarize the responsibilities of the department as a whole.
4. List each team's interdependencies.
5. Describe the impact on the department if each team failed to do its job.
6. Create an organizational chart that demonstrates each team's interdependencies to and interactions with the other teams.
7. Create a table that lists how each team positively and negatively impacts the Firm financially.
8. Explain why your department is important to the firm.

Group Activities

The remainder of the course will consist of a series of group activities that you will complete that will help to broaden your understanding of each departmental team's job functions and how everybody contributes to the success, or failure, of the department. Complete one activity at a time. Fill in the Report Template as you go. Each group will document and explain its findings which will be presented to the instructor to be graded at the conclusion of the class.

Provide approximately 30 minutes for each activity including class review and discussion. These activities will be conducted within groups that contain a minimum of two members from each departmental team. Using their existing professional knowledge they will be able to educate the other members of the

group about the purpose of their own team and collaborate with the group to determine departmental responsibilities, interdependencies, interactions and financial impacts.

Activities:

1. Describe the purpose of the each team within your department.
 - a. List each team within the department and then write a brief summary (200 words or less) of what each team's daily responsibilities are. Think about the tasks that the team performs and how those tasks benefit the department and the Firm.
2. Summarize the responsibilities of the department as a whole.
 - a. Write a brief summary (200 words or less) of what the department's responsibilities are. Think about how the department benefits the Firm.
3. List each team's interdependencies.
 - a. What does one team have to do before another team can complete its responsibilities? List everything you can think of for each of the teams.
4. Describe the impact on the department if each team failed to do its job.
 - a. How does one team's inaction prevent another team from doing its job? How can each team contribute to an environment that makes everybody's jobs easier?
5. Create an organizational chart that demonstrates each team's interdependencies to and interactions with the other teams.
 - a. Use the template to organize your results from activities 1-4.
6. Create a table that lists how each team positively and negatively impacts the Firm financially.
 - a. Fill in the provided table with how you think the Firm will make or lose money based on each team's actions. Be creative!

Conclusion

For the remainder of the class you may work with your group to revise your final report before turning it in to your instructor.