Chapter 4: Mission Statement Building Worksheet

This Help Desk improvement checklist worksheet is intended to be used in conjunction with the related chapter in the Help Desk Management Book by Wayne Schlicht.

We discussed what a mission statement is. We explained that a department's mission statement should clearly and precisely be focused on what your Help Desk is all about and related to the customer support your team provides. The mission statement will bring the strategic focus of underlining the goals and objectives of your team based on company values. We also discuss the benefits of a mission statement. Now it's time to build your department's mission statement.

Objectives

When building your department's mission statement, your goal is to meet the following three objectives.

Create a department mission statement that incorporates your company's goals, objectives, and values.

Integrate the mission statement into your department's culture and processes.

Communicate your mission statement to your customers in both a communication plan and daily support interaction.

Creating a department mission statement

This chapter assumes you are focused on departmental improvements and may have a company-wide mission statement in place. The same principles discussed in this chapter for department-level mission statements are the same for company-wide statements. If you do not have a company-wide mission statement to start with, that is ok. Proceed with your department's mission statement creation with a clean slate. To create a departmental mission statement, you first should completely understand what the goals and objectives of the company you work for are. It is important to make sure the new department's mission statement aligns and does not conflict with the corporate mission statement. By reflecting on the corporate mission statement, determine what your department does to help the company meet those goals and objectives. The mission statement should be written from the customer's perspective, be very specific, and it should fit with the vision for the business. The mission statement should answer the following mission statement building questions:

Step 1 – Mission Statement Building Questions

Part of the process of creating a mission statement is to reflect on the below questions and document your answers.

What do we do?
How do we do it?
For whom do we do it?
What sets us apart from our competitors?
How will you use your resources to reach your goals?
What words best describe your team, service, and customers?

This exercise is not just for the department leader to complete. Creating a mission statement is a department-wide effort. It is important to assemble many voices from your department to gather input by answering these questions. What is the best way to get input from a good cross representation of voices from your department? We suggest assembling a project team and holding a focus group.

Step 2 – Assemble the Project Team

It’s important to assemble the core mission statement project team members before proceeding. There are specific resources you will need to avoid becoming overwhelmed with tasks.

Project leader – The person in charge of the project who will, with input, create the scope, define tasks, and keep everyone on track.

Technical Writer – Holding a focus group and creating a mission statement requires a person with good documentation skills.

Meeting Facilitator – Running a lively focus group is not for everyone. Having someone trained or at least familiar with how to run one effectively will improve the input. Ideally, the facilitator will have a technical writer take notes and possibly videotape the session.

Communication resource – While communication is important for the entire project, it is especially important during the implementation stage. A communication resource will ensure the stakeholders, project team, and other groups are informed of the status.

Customer / Business liaison – This is a person who can assist with identifying focus group participants, evaluating mission statement drafts, and assisting with the implementation.

Step 3 – Prepare Focus Group Meetings

In this section, we will discuss what the project team will need to do to prepare for the mission statement focus group meetings.

Create a focus group agenda

State the purpose of the focus group, which is to gather input from the group to build an effective mission statement. Remember, the purpose of a focus group is to focus on this single topic.

To establish your objectives for the focus group meeting, start building your agenda by using the six-mission statement building questions.
These questions will help you stay focused and gather good information.
Identify who you want to invite to the focus group meeting. You should have a good cross representation of staff, leaders, customers, and business partners. If you identify more than ten people to invite, consider creating multiple focus groups.

If you do have enough participants to create two or more focus groups, then make one a control group. A control group is the specific target group, which is the Help Desk. The second group would be the one with a good balance across the company. This will allow you to compare answers from internal to external groups.

Build into the agenda enough time for participant discussion. Remember, this is not a presentation but a forum to get specific input from the group.

Gather the focus group meeting materials.

Reserve a room large enough to host the meeting.
Whiteboard or presentation easel.
Markers, pens, and pencils.
Large post-it notes cards.
Large wallpaper so you can attach the post-it notes.
Name tags and table tents.
Tape.

Arrange the room

It is important the room is set up to maximize participation in the focus group. Here are some general ideas on how to arrange the room.

Room setup – Arrange the tables and chairs in a square, U shape, or circle. The idea is to have people facing each other to spur discussion and collaboration.

Presentation – Please put the whiteboard or presentation easel in a spot where everyone can see it.

Tools – Place the following supplies in each spot.

Handouts – Print out the agenda, name tent, pens, markers, paper, and post-it note cards.

Step 4 – Hold Focus Group Meetings

Now that you have assembled the project team, have an agenda, have gathered the materials, and set up the room, it’s time to run the focus group meeting. This section will discuss how to run a focus group and how to obtain the output you need.

Meeting Start Tips

Attendance – Have all participants sign in to keep a record of who attended.

Names – Have the participants put their name on a table tent and place it in front of them.

Greeting – Acknowledge that people are busy and thank them for attending.

Overview – Set the stage for the group. Describe the project and what you hope to gain from the group. In this case, we want input from the focus group about the Help Desk.

Agenda – Review the agenda of the meeting. Go over how it will proceed and how the members can participate.

During the Meeting Tips

Neutrality – As a moderator, remain impartial and neutral. Don't provide positive or negative feedback. Just thank them for sharing.

Active listening – Validate long-winded or unfocused comments by summarizing what they said. To confirm what member state, start by saying, "here is what I understood you said."

Different viewpoints – Remember, there is no right answer. You are trying to gather their perspective even if their feedback is contrary to your understanding.

Equal time – Make sure all members get a chance to be heard and express their opinion. For shy participants, prompt them with follow-up questions to elicit more information.

Engage participants – Prompt members that are engaged in discussion with a specific question directed to those people.

Rephrase questions – Sometimes, people understand a question better if you restate it in a different way.

Wrapping Up the Meeting Tips

Summarize next steps – Prior to the meeting ending, provide the group an overview of the project status and what are the next tasks.

Be thankful – Thank everyone for participating.

Contact information – Provide everyone a way to contact the project team if they want to provide more information.

Personalized meeting – Offer to meet individually with any participant that would feel more comfortable providing feedback in a private setting.

Step 5 – Post Meeting tasks

Debriefing – Immediately following the focus group session, the facilitator and note-takers need to review all the focus group input received. This includes the notes taken during the meeting, written information from the participants, and thoughts from the focus group facilitators. Do not wait to hold this meeting. It is important to discuss the input while it is still fresh.

Control the input – Make sure all focus group input is documented, copied, and saved for the historical record. This includes flip charts, pictures of whiteboards, and all papers.

Organize the input – Review the input and determine if there are common themes. Start categorizing the input into similar categories. The categories should be arranged based on the questions we discussed previously.

What do we do?
How do we do it?
For whom do we do it?
What sets us apart from our competitors?
How will you use your resources to reach your goals?
What words best describe your team, service, and customers?

Step 6 – Assemble a mission statement

With the organized focus group input, you can start to formulate answers to the following questions. These answers will be in the form of a short statement of one sentence. The answers will be combined to form a mission statement paragraph. The paragraph will then be modified with keywords that will enhance the final product.

Create a short statement for each of the following questions.

Question 1 – What does your team do? (example: We provide technical support for our company's accounting software)

Question 2 – How does your team do it? (example: We handle support requests by phone and email 24/7/365)

Question 3 – For whom does your team do it? (example: We provide support to our external customers using our accounting software)

Question 4 – What sets your team apart from your competitors? (Example: We ensure 100% customer satisfaction, or we will refund your purchase.)

Question 5 – How will your team use its resources to reach your goals? (Example: Our team will respond to all calls with professionalism and use our expertise to resolve issues.)

Question 6 – What words best describe your team? Your service? Your customers?

Put the answers together to form a basic mission statement.

Example – We provide technical support for our company's accounting software by phone and email 24/7/365 to our external customers. We ensure 100% customer satisfaction, or we will refund your purchase. Our team will respond to all calls with professionalism and use our expertise to resolve issues.

Identify the positive words used by the focus group to describe your team, its service, and customers

Example – Teamwork, passionate, determined, fun, creative, outstanding, award-winning, family, loyal, globally

Add selected positive words to the basic mission statement to enhance it.

Example – We provide outstanding technical support for our company's accounting software by phone and email 24/7/365 to our loyal customers globally. We are determined to ensure 100% customer satisfaction, or we will refund your purchase. Our team will respond to all calls with professionalism and use our expertise to resolve issues.

Department ownership of the mission statement

Once you create a mission statement, you are not done. Simply communicating the mission statement once to your staff will lead to sure failure. Your entire team needs to understand and embrace your mission statement in everything they do. It must be ingrained into your culture. The staff needs to be introduced to the mission statement in a team meeting format. The statement should be discussed. All the keywords in the mission statement should be discussed in detail. Handouts should be provided, and all web pages, documents, and team areas should have the mission statement visible.

Implementing a Mission Statement

Initial rollout

Print a copy of the mission statement for every employee.

Gather your employees and review the mission statement together.

Ask employees what specifically the mission statement means to them with specific examples.

Reinforcement

Add the mission statement to the employee handbook, onboarding training guide, and other department documents.

Create a poster-size printout of the mission statement and place it in highly visible areas in the department, such as the breakroom, entryway, and workspace area.

Create card-size printouts of the mission statement to place on the employee's phone or computer monitor. This will reinforce the mission when the Help Desk agents are providing customer support.

How to communicate your new mission statement to your customer.

Rolling out your new mission statement to your customers is very important. You want your customers to know what your business is all about and how much you value providing award-winning customer support. Ensure the mission statement is prominently available for your customers to see and review. A prominent location will most likely be your Intranet or Internet home page. We suggest that your mission statement be displayed on your public-facing support page. This could be a page on the company Intranet or a self-service portal. It is also recommended that your mission statement be included in any communication from your team to your customers. This can include email notifications, published support documents, and training material.

Make it visible

Add your mission statement to your public-facing Help Desk support page.

Add your mission statement to your customer email communications, such as the support ticket open and closure emails.

Ensure your customer satisfaction surveys include questions that are based on your mission statement values.