

Lunch & Learn

Experience Exchange on Cross-Functional Collaboration.

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Lunch & Learn

Experience Exchange



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Cross-Functional Collaboration: Breaking Down Silos to Build Stronger Teams

- Welcome to today's Lunch & Learn Experience Exchange on Cross-Functional Collaboration.
- Over the next 45-60 minutes, we'll explore practical strategies to:
 - Break down departmental silos
 - Improve team communication
 - Align our efforts around shared goals
- Recent survey findings and leadership transitions make this conversation especially timely as we work to strengthen our collaborative culture.

This session is designed to be interactive, drawing on real experiences from across our organization:

1. You'll hear success stories
2. Participate in discussions
3. Leave with actionable techniques you can implement immediately to foster better cross-team relationships



Setting the Stage: Why Collaboration Matters Now

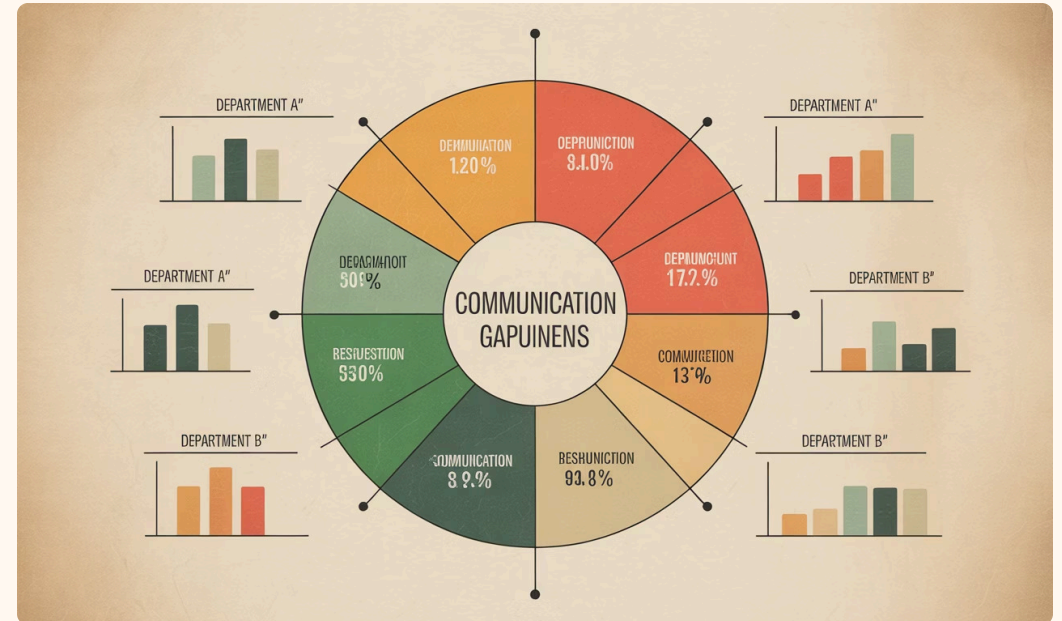
Today's Agenda

- Welcome & Context Setting (5 mins)
- Breaking Down Silos (10 mins)
- The Client's Perspective (10 mins)
- Bridging Gaps Between Departments (15 mins)
- Leadership Transitions & Risk Management (10 mins)
- Wrap-Up & Action Steps (5 mins)

Why This Matters

Our recent survey highlighted concerning trends in communication and siloed work patterns. These disconnects directly impact:

- Client satisfaction and retention
- Innovation and problem-solving capacity
- Team morale and efficiency
- Knowledge transfer during leadership transitions



Today's goal is threefold: share concrete examples of successful cross-functional work, hear your perspectives on collaboration barriers, and collectively develop actionable strategies to strengthen our teams. Rather than theoretical concepts, we'll focus on practical approaches you can implement immediately.

As we navigate upcoming leadership changes, building robust cross-functional relationships will be essential for maintaining continuity as things transition, growth, and seizing new opportunities for innovation.

Breaking Down Silos: Recognizing Barriers

The Silo Effect in Action

Imagine each of us as a ship in an armada that's charted a specific course. We've given us the autonomy to build the ship how we want it, outfit it with a crew and navigate the ocean path however we want. What's missing is the ultimate horizon point we're all moving toward which unifies the overarching direction that the Armada works for or toward. And we're not communicating where and what everyone is doing in a way that is effective.

That's why we continue to operate disjointedly.

- It's the challenges of not all working on the same ship in the same harbor every day.
- It's the challenges and stress we put on the home base teams; admin, HR, accounting in tracking everything we do.

Common symptoms of siloed operations include:

- Duplicate work efforts wasting valuable resources
- Misaligned project timelines causing delays
- "Us vs. them" mentality creating friction
- Knowledge hoarding rather than sharing
- Competing priorities without holistic vision



One Company, Not Departments



When Silos Hurt

Team and clients experience frustration when they receive conflicting information from different departments. One team promises a timeline that another can't deliver, or messaging varies depending on who they speak with. This creates an impression of disorganization and damages trust.



When Collaboration Helps

When teams work seamlessly together, we experience a consistent journey regardless of which department you interact with. Information flows smoothly, deadlines are realistic and honored, and solutions feel comprehensive rather than piecemeal.

Brainstorming Activity: See Through Each Other's Perspective

Take a moment to consider these questions from a client perspective:

- What aspects of our service delivery reveal our internal silos?
- Where have you seen confusion by different departments' approaches?
- What communication gaps between teams have impacted client deliverables?
- How might we restructure our workflows to present a more unified front?

Remember: While we might have a variety of functional groups marketing, operations, sales, or finance departments— clients see one company. By viewing our processes through the client or other people's lens, we can identify critical collaboration opportunities that directly impact satisfaction and retention.

Leadership Transitions: Risks and Opportunities

The Approaching Change

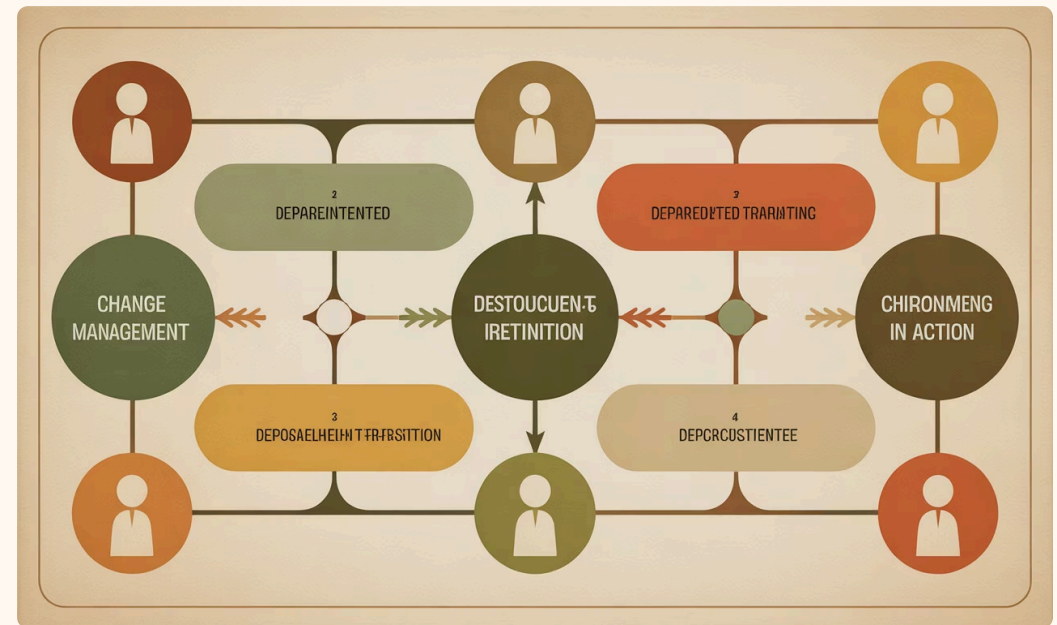
As we navigate upcoming management transitions, it's important to acknowledge both the challenges and opportunities this presents for cross-functional collaboration. Leadership changes inevitably disrupt established communication patterns and can weaken bridges between departments.

Potential Risks

- Loss of institutional knowledge about cross-team dependencies
- Team fragmentation as reporting lines shift
- Competing priorities emerging without established arbitration
- Relationship networks weakening without intentional maintenance
- Uncertainty about decision-making authority during transition

The Collaboration Opportunity

While transitions create uncertainty, they also provide a rare chance to rewire collaboration norms and establish more effective cross-functional practices. This is our moment to implement improvements rather than simply maintaining the status quo.



Middle Managers as Connectors

During transitions, middle managers play a crucial role as:

- **Communicators:** Translating vision across departments
- **Connectors:** Maintaining relationship bridges
- **Culture Setters:** Modeling collaborative behaviors

If you're in a leadership position, consider how you can strengthen cross-departmental relationships now to build resilience ahead of transitions. This might include establishing regular cross-team check-ins, documenting key dependencies, or creating shared accountability structures.

For individual contributors, this is an ideal time to develop your own cross-functional relationships independent of reporting structures. These connections will serve as valuable resources regardless of organizational changes.

Bridging Gaps Between Departments: Practical Techniques



Shared KPIs

Develop joint success metrics that incentivize cross-team collaboration rather than department-specific wins. When teams are measured on the same outcomes, alignment naturally follows. Example: Customer satisfaction scores that apply equally to all departments involved in the client journey.



Rotating Leads

Implement rotating team leads or cross-functional working groups to ensure diverse perspectives. This breaks down knowledge silos and builds empathy across departments. Temporary assignments in other departments can transform "them" into "us."



Intentional Tools

Move beyond email and chat by using collaborative platforms purposefully. Create shared workspaces with clear ownership and transparency. Document decisions and context so teams joining later understand the "why" behind choices.



Micro-Meetings

Project Admin Team meeting; or cross-department standups or "pulse" meetings focused solely on coordination points. These brief touchpoints prevent misalignment before it becomes problematic and create regular communication channels.

BREAKD OUT DISCUSSION ACTIVITY

In small groups, discuss these questions for the next 10 minutes:

1. "Where do you see silos creating friction in your current projects?"
2. "What specific practices could help us shift from 'handoff' to 'handover with context'?"
3. "Which of the techniques above seems most promising for your team's challenges?"

We'll reconvene to share key insights and identify common themes across departments. These observations will help inform our Collaboration Wall initiative.

Wrap-Up & Action Steps: Building Momentum

Individual Commitments

Before leaving today, please identify one specific action you can take this week to strengthen cross-functional collaboration:

- Invite someone from another department to your next project check-in
- Schedule a 15-minute coffee chat with a colleague whose work impacts yours
- Document a process that crosses department boundaries
- Share a customer insight with a team that might not typically hear it
- Identify a recurring meeting that would benefit from cross-team representation

The Collaboration Wall

We're launching a virtual "Collaboration Wall" where teams can post:

- Current projects seeking cross-functional input
- Collaboration wins and success stories
- Resources for better cross-team work
- Questions or challenges where other perspectives would help



Measuring Our Progress

In the coming weeks, we'll send a brief follow-up survey to assess:

- Changes in cross-departmental communication frequency
- Improvements in information sharing
- Reduction in duplicate work or misalignments
- Implementation of techniques discussed today

Your feedback will help shape additional resources and support for cross-functional collaboration. We'll also use these insights to inform leadership about structural changes that could further remove silos.

Remember: Building strong cross-functional relationships isn't just about efficiency—it's about creating a more engaging, innovative, and supportive work environment for everyone.

Homework Assignment:

The Cross-Team Coffee Chat Challenge

1 Pick a Partner

Choose someone from another department you rarely work with or have always wanted to understand better. If you're not sure who to approach, we'll provide a suggested contact list or pairing board to help make connections.

3 Ask and Share

Use these optional prompts to guide your conversation:

- What's one project you're working on right now that excites you?
- What part of your job do others often misunderstand?
- How does your team define success? What metrics matter most?
- What's one thing you wish other departments knew about your team's challenges?

2 Schedule a 15-30 Minute Chat

Keep it casual—this could be a video call, in-person coffee break, or even a walking meeting. No formal agenda is required, though you can use the conversation prompts provided below if helpful.

4 Reflect Briefly

After your chat, prepare 1-3 sentences to share at next week's Lunch & Learn:

- "One thing I learned about another department is..."
- "One way I can collaborate better with [their team] is..."

Objectives and Timeline

This challenge helps build awareness, empathy, and context across departments through intentional conversation. Please complete your coffee chat within 5 business days after today's session.

Team Incentive

If 75% of the team completes the challenge, everyone will be entered into a drawing for lunch gift cards—or we'll organize a small team celebration. More importantly, these conversations will begin weaving a stronger collaborative fabric throughout our organization.