

# How to Create a Working Team Agreement

Teams use this process to gain clarity about how they'll work together over the next 3 to 6 months. These agreements increase team productivity and alignment by reducing confusion, duplication, delays, and misunderstandings.



## **Purpose:**

To decide on a near-term plan outlining how we'll coordinate and collaborate on our work.

## **Expected Outcomes:**

- A documented set of agreements clarifying where, when, and how we'll work together
- Clear air: everyone has an opportunity to share preferences and clarify assumptions
- A scheduled day and time for revisiting this agreement

## Agenda

1. Set Intention: What are we going to create today?
2. What do we already agree on?
3. *Think Break*
4. How can we resolve areas of disagreement?
5. Review: Is our agreement good enough for now? What happens next?

## Preparing for this Meeting

Your team will need a day or two to prepare for the meeting.

### **When to Schedule this Meeting**

Schedule this conversation when:

- Forming a new team
- Changing your team's work priorities (e.g., taking on a new business line or major project)
- Changing your team's work location or schedule
- Introducing new team members who work from a different location or timezone

The first time you run this meeting, reserve at least 2 hours. If you know the group is likely to disagree, also plan time for a long *Think Break*.

When meeting to review and update an existing agreement, schedule 30 to 45 minutes.

### **Ask Teams to Come Prepared**

Share the agreement format you'll use with your team in advance. Ask them to come prepared with a list of their ideas for each part of the agreement. You will collect these in writing during the meeting and compare everyone's answers.

## Meeting Leader's Prep Worksheet

Use this worksheet to document what your team's agreement will cover and any decisions that are out of scope for this group.

**1. Which company policies constrain how this team works?**

For example: defined hours of operation, part-time vs. full-time hourly limits, mandatory vacation or time tracking, security rules, mandated use or bans on technology, etc.

**2. What resources can you use in your work together?**

For example: technology and systems of record, office space, travel allowances, administrative support, training or technology budget, etc.

**3. How will you make decisions in this meeting?**

For example: confirming consensus with a go-around or vote, majority rule, leader decides, etc.

**4. How will you document and share this agreement?**

Decide how you'll capture notes during the meeting and how you'll publish the final agreement after the meeting.

**5. What specifically do you need to agree on?**

See the examples and resources on the next page for ideas.

## What does your team need to agree on?

If this is your first working team agreement, you may want to use a pre-defined working team agreement canvas. You'll find links to our favorites listed under [Useful Resources](#) on the last page.

Before you select an approach, consider your team's unique work environment and context. Your new agreement should make what you can expect from one another super clear. If that means you need to talk about how to handle a particular piece of equipment, or how to add comments to work in progress, or where to sit on Friday, then add those elements to your agreement!

Use this worksheet to help you select the questions you'll ask your team. Then, copy the selected questions and any additional questions specific to your team into a separate document.

**Send your questions to all team members before the meeting.**

### Questions About Why This Team Exists

- ☐ Purpose: What is our purpose?
- ☐ Goals: How is our success measured?
- ☐ Values: What values guide our work?
- ☐ Conduct: How must we conduct ourselves to ensure we honor these values?

### Questions about Coordinating Your Work

- ☐ Coordination: Where and when will we work? (Consider creating an [Hours of Overlap](#) chart.)
- ☐ Availability: How will we know when a team member is available?
- ☐ Expected Response Time: What response times do you expect when you make a request?
- ☐ Communication Channels: How will we communicate with each other? Which tools will we use for which messages?
- ☐ Status: How will we know what's being worked on?

### Questions about Collaboration

- ☐ Meetings: Which meetings do we need? (Consider creating a [Meeting Flow Model](#))
- ☐ Focus Time: When will we reserve meeting-free time for concentrated work?
- ☐ Candor: How will we share feedback?
- ☐ Conflict: How will we surface problems and resolve conflicts?
- ☐ Decisions: How will we make decisions? (Consider creating a [Decision Matrix](#).)

### Special Sauce

- ☐ Getting to Know Each Other: What will we do to socialize?
- ☐ Victories: How will we celebrate?
- ☐ Recognition: How will we recognize excellence?
- ☐ "It factor": What will we do that's fun and cool?

# Leading the Meeting

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## 1. Set Intention: What are we going to create today?

Greet everyone and share the purpose of your meeting, explaining what you're there to create and why it's important to establish this working agreement now.

Be sure to **clarify the agreement duration**, so everyone knows when you'll come back to improve anything that doesn't work out. Knowing that you'll have an opportunity to revisit these decisions later reduces the need to "get it right," and takes off a lot of pressure.

**Orient the team to the questions you'll answer.** Also clarify the company policies and resources available to you, so they know the boundaries around the choices they need to make. Answer any questions they have about each section. This helps everyone visualize what you're working to create.

Then, quickly **walk through the agenda** and clarify the decision making process. We recommend seeking consensus, with the leader taking responsibility for any decision where consensus isn't possible.

When your team confirms that they understand the goals and constraints, move to the next step.

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## 2. What do we already agree on?

Now, you'll work through each area of your agreement to see where you already agree.

Follow these steps:

1. Ask one of your questions.
2. Silent brainstorming: Individuals post their ideas in writing
3. Group similar ideas.
4. Highlight areas of agreement.
5. Identify and mark out areas of unclear agreement. Don't get into these now. Just note them and set them aside.
6. Create a single, clear statement for each agreement. Celebrate your agreements.

### An example:

Here's how this might work for a team discussing operating hours.

Step 1. The meeting leader might say:

*"We'll start with working hours. On your own, write down the days and times each week that you prefer to work, where you want to work from, and any anticipated exceptions to your normal working hours."*

Step 2.

Set a two-minute timer while your team writes their answers in a private document or on individual sticky notes.

Step 3.

At the end of two minutes, invite the team to share what they've written.

For example, you might say:

*"Now, our goal is to get all these preferences out where we can see them and identify commonalities. We don't need to debate or discuss these in any detail right now - we're just going to get it all out there. Let's go-around and share, one at a time.*

*When someone shares their idea, if you have something similar to that, speak up and add yours too. If you don't understand an idea, please ask for clarification - but again, clarifying questions only. This isn't the time for debate; we'll do that next."*

Step 4

Highlight any agreements that emerge naturally. For example, if the whole team agrees that they need to be working Monday through Thursday from 9am to 4 pm, write that down.

Step 5

Set aside any areas that can't be easily resolved within a few minutes and move on to the next section of your agreement. For example, if some people on your team want to work early mornings or on weekends, but others feel everyone needs to fully unplug, set this aside for now.

Step 6

After you've answered each question on the list, create a short agreement for each area where the team already agrees. Then, celebrate! You already agree on some things, which means you can find ways to agree on the rest.

Next, you'll take a think break. Ask your team to consider how you might resolve the areas of disagreement during the break.

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### 3. 10 to 60 Minute Think Break

Grab a snack, take a stroll, and think of ways to resolve the disagreements that best support your team.

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### 4. How can we resolve areas of disagreement?

Next, work through any areas of disagreement. Remind the group that this agreement will be revisited at a later date, so you do not need "perfect" answers. Instead, seek agreements that are **GETGo: Good Enough to Go** for now. Also remind the team of the decision-making process you'll use to finalize each agreement.

For each area of disagreement, ask:

- **Do we need to resolve this?**

For example, a team that disagrees about working hours may decide that it's ok for team members to work whenever they want, as long as they keep each other informed, attend key meetings, and complete work on time.

- **If we need resolve this, who has a solution to propose?**

Ask advocates to share what they think the agreement should be. Who has a strong opinion about how we should handle this?

- **Then ask: who has a different idea?**

- **Check for consensus and document agreements.** If your team doesn't arrive at a natural consensus in a timely way, use the decision-making process you selected to break deadlocks and make the final call.

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## 5. Closing Review and Appreciations

You've just completed great work! Review everything you've accomplished by checking that:

- The documented agreements are complete and accurate.
- Someone is assigned to clean up and publish this agreement where it will be easy to find later.
- Everyone knows when they can expect to re-evaluate and update this agreement. Add this to your calendars now to ensure this review happens.

Then, thank everyone for their time and effort to create the best possible working agreement for your team.

## After the Meeting

Make sure the agreement is completed and published as planned, and schedule the next meeting to review the agreement. You may choose to run that meeting as an Action Review to make minor, incremental changes. Or, you can run this entire session again to refresh the whole agreement.

Once the agreement is posted, don't set it and forget it! Instead, consider your working agreement to be a living document and use it to:

1. **Onboard new team members.** Hand new team members a one-page overview of your team agreement, showing them what they can expect and how they can work successfully with your team, to help them ramp up quickly.
2. **Inform performance conversations.** When a team (or team member) isn't working successfully, refer back to the agreement. Were they unclear about the expectations? Have their circumstances changed? What do they feel is getting in the way of their success? Holding these conversations early and often can prevent the damage caused when bad assumptions and inter-team frustration are allowed to fester under the surface.
3. **Advocate for your team's success.** In your discussion, your team probably identified ways they could work more effectively with additional resources or changes to company policy. As a leader, you now know how to help your team get the best possible results and can advocate for those changes.

## Useful Resources

### Working Agreement and Culture Canvases

Several experts have published team agreement canvases that you can download and use with your team. Here are some of our favorites.

- [How to Create a Remote Team Working Agreement](#) by Lisette Sutherland, Collaboration Super Powers
- [The Hybrid Team Canvas](#) by Gustavo Razzetti, Fearless Culture Design
- [Ways of Working Canvas](#) by XPlane
- [The Team Canvas](#) by Alex Ivanov and Mitya Voloshchuk

### Related Meeting Guides and Articles

These templates and articles help your team get into more detail for some of the most important working agreements.

- Guide: [The Leader's Guide to Designing the Relationship with Your New Group](#) by Paul Axtell
- Guide: [How to Run COVID-19 Team Meetings Using ORID](#) by Barbara MacKay, Northstar Facilitators
- Guide: [How to Create a Group Decision-Making Matrix](#) by Tammy Adams Spann
- Article: [How to Create a Useful Meeting Flow Model for Your Team](#) by Elise Keith
- Google Sheets Template: [Hours of Overlap](#) by Mark Kilby, including links to related articles