

# Team Agreement Framework



The following questions are useful discussion points when a team first comes together to work on a project. Many high-performing teams document their responses and use the resulting Team Charter as a reference document to periodically check-in with each other, document any changes, and hold each other accountable to agreed-upon behaviors throughout the life of the project.

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 **Team Membership**

 **Share Expectations**

 **Clarify Goals**

 **Monitoring & Evaluation**

 **How We Will Work Together**



# Team Membership

## 1 Who is on the team?

The individuals named here should include full team members (e.g., the ones in the conversation around this document), but it's also worth noting key support personnel or other individuals who may be resources to be tagged in as needed.

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## 2 What are the criteria for team membership?

Criteria could include project-based requirements but should also focus on the more informal expectations team members may have of one another (e.g., “You have to appreciate your other teammates,” “Have a sense of humor” or “Be brave and optimistic in taking on entrenched, ‘That’ll never work here’ culture”).

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# Team Membership

## 3 What are the 2-3 most critical skills/attributes that each member brings?

Individuals should name their own skills/attributes, and other team members can subsequently offer additional skills/attributes they perceive in that person.

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## 4 In what one key area would each member like to improve?

Individuals should name their own area for improvement; other team members should NOT offer their views on this question.

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# Share Expectations

## 5 What are each member's hopes and fears for this team?

What are hopes that people have for the impact they can have with their work? On each other? For their process of working together?

What fears do team members carry about what could go wrong? If the team were to fail, what could have been the reason it failed?

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# Clarify Goals

## 6 What is the team's work?

What has this team come together to do? What are the goals related to the customer? What are the goals for the team itself (e.g., learning)?

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## 7 What are the team's core values?

What are the values which will guide individuals on the team both in the “what” and the “how” of their work with the customer and with each other?

Examples could include:

<ul style="list-style-type: none"><li>• “Curiosity and continuous learning”</li><li>• “Assuming best intentions”</li></ul>	<ul style="list-style-type: none"><li>• “Making intentional choices”</li><li>• “Fun – we do not tolerate misery”</li></ul>
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# Clarify Goals

## 8 What deliverables will the team produce?

What are specific outcomes, outputs, and products that the team will compile and generate as it moves forward with its work?

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# Monitoring & Evaluation

## 9 How does the team evaluate its work and measure the results?

What does success for the team look like? How will the team know whether it has achieved success? What metrics and data will guide that assessment? When and how will the team gauge its progress?

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# How We Will Work Together

## 10 How will the team make decisions?

What types of decisions does the team anticipate having to make? What will be the default decision-making process (e.g., consensus, consultative, authoritative)? Who has the authority to make what decisions? For Example: “Any strategy decisions will be Jane’s overall decision, but on Lane 1, John can own most decision-making.”

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## 11 What are the most efficient ways to get work done?

What beliefs do team members have about the best ways to work as efficiently as possible? What trade-offs are the team willing to make (or not make) in pursuit of efficiency? For example: “We need to spend more time together as a team at the start of the project or a new project phase to ensure we’re aligned, but once we get into the day-to-day work, our weekly sync will be sufficient.”

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# How We Will Work Together

## 12 What are the roles and responsibilities of the team?

What are some of the overarching roles? What lanes or discrete tasks exist, if any? Who will assume any specific roles associated with the overall project or discrete tasks?

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## 13 How will team members communicate?

What are the mechanisms that the team will use to communicate? What is the ideal frequency of communication? What situations (e.g., opportunities or challenges) might arise to trigger extraordinary communication, either in terms of frequency or mechanism? For example: We'll primarily use Gchat for small updates and questions, and e-mail for tasks. If something urgent comes up, then Jack will call Betty on her cell phone.

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# How We Will Work Together

## 14 How do team members make sure that everyone's voice is heard?

What are some of the different communication styles on the team? What amount of time do individuals need to reflect before they feel comfortable contributing? For example: "Jack and Jane are extroverts, so they need to talk things through, but Aaron wants more time to think and appreciates someone checking in with him before the meeting ends."

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## 15 How will the team resolve differences among team members?

How will the team handle conflict when it arises? How do team members feel most comfortable naming differences? For example: "If any team member feels like they disagree with what's happening, let's avoid having an extended e-mail chain. Anyone has the right to call a meeting to discuss it."

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# How We Will Work Together

## **16 How will team members give feedback and course-correct, as needed?**

In what style do team members prefer to give and receive feedback? How will the team solicit and manage feedback they receive from the customer(s)?

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