Manager Quick Guide: Developing team agreements

Why this matters: There are as many ways of working as there are employees. As an organization, we value and support flexibility as part of our hybrid workplace where every employee can do their best by working the way they prefer. Flexibility may differ with each role, work site, work hour, and work location. Team agreements can bridge these differences, helping teams communicate and collaborate by discussing and agreeing to certain principles and guidelines that reflect the diversity of workstyles on the team. All workplace options for individuals should depend on the alignment with team agreements, in addition to alignment with our organization's other hybrid work guidance. See your organization's guidance on hybrid work for details.

Your role: As a manager, you have the opportunity to lead your team in establishing team agreements that clearly outline how the team will work together and support diverse workstyles.

Establishing team agreements

To create these agreements, you will need to facilitate an ongoing conversation with your team that considers business needs, individual needs, and the needs of the team broadly. See your organization's guidance on facilitating conversations for guidance. You'll need to ensure your team agreements enable everyone on your team to be effective. It is important that you model, coach, and care, challenging assumptions and offering your team the most flexibility possible. See your organization's guidance on flexible working to ensure agreements are in alignment with our organization's policies.

We recommend you complete these seven steps for establishing team agreements in a hybrid workplace.

1

Set the context with your team
Establishing team agreements is best done by collaborating with everyone on the team. To set context, start with team conversations that spark discussions for decision making and health and safety. See your organization's guidance on team conversations for sample conversations, which are built to get your team thinking and set the stage for the future team workshops specifically around the team agreements. See your organization's guidance on workshops for workshop guidance.

2

Consider how to enhance your skills for leading a hybrid workplace
Leading in a flexible work environment is a skill that benefits from ongoing investment in learning and development. See your organization's guidance to managers on hybrid work to learn more about how to help all employees navigate and adapt to our hybrid workplace.

3

Consider your team's core priorities and existing dynamics
All employees have a worksite, work hours, and work location. A hybrid workplace assumes a mix of workstyles across all three dimensions for our employees and our organizations. We are all accountable for taking the time to consider the workplace that is currently best for us to fulfill our responsibilities while also ensuring the health and safety of those around us. Take the time to zoom out and consider the working patterns across the team. For example:
- What are the objectives of your team's work or current projects?
- What is the nature of their work (e.g., collaborative or individual)?
- How long has the team been working together?
- Have they already been working in a hybrid environment?
- Which working styles would allow the team to deliver high performance and maximize flexibility?
- Are there occasions when it might be important for the team to be together in the same location (e.g., new projects, projects with high task interdependence, brainstorming or creative work, communicating essential informal knowledge, etc.)?

4 **Set up 1:1 conversations to support employees**
As a manager, helping your team deliver their best work through a hybrid approach geared towards their needs is an important part of your role. There are many factors that they will need to consider in their decision-making process, such as the health and safety of those around them, personal circumstances, productivity, and their ability to complete their work. See your organization's guidance on 1:1 conversations and additional employee guidance for more information.

5 **Create and align on team agreements**
To create alignment, facilitate a conversation with your team to develop your own team principles and team guidelines. See your organization's guidance on developing team agreements for guidance. Now that you have created the context for the team, consider the ways of working that will enable them to be at their best. Talk to the team about what agreements they want to make to have clarity around how they might best work together. Examples include:

- **Availability** – are there certain hours of the day that the team needs to be available, either in person or virtually (e.g., establishing core hours across the team, agreeing to response times for emails, questions, etc.)?
- **Attendance** – which key events do team members need to attend, either in person or virtually (e.g., daily stand-up meetings, weekly team meetings, etc.)?
- **In-person expectations** – be clear on the occasions where the team is expected to be together in person to achieve business results (e.g., quarterly team offsite, project kick off, etc.)
- **Team habits** – what are the daily practices that the team wants to adopt to ensure effective work in a hybrid environment (e.g., 55-minute meetings to ensure natural breaks are built into the day, sharing and respecting communication preferences (emails, calls, chat), etc.)?

In addition to the team workshop, see your organization's guidance on effective team meetings for additional guidance.

6 **Capture and share team agreements**
Document what was discussed and decided upon during your team agreements workshop. Alignment and ownership of team agreements is important, so invite feedback or further suggestions in case something was not captured during the workshop itself. Review them against organizational guidance and share with your manager to ensure alignment. Once feedback is incorporated, share widely with your peers, team members, and stakeholders.

7 **Follow up regularly**
Align with the team on how, when, and how often you will check in on how the team agreements are working. Agree on a process for requesting any changes to ensure the agreements remain flexible and responsive and that the team stays aligned.

Resources
- For more information about our organization's COVID-19 policies and procedures, see your organization's guidance.
- For more information about our organization's flexible hybrid work options, see your organization's guidance.
- For general guidance, tips, and resources for working from home during COVID-19, see your organization's guidance.
- Send your team agreements to us! Email them to [email address] and we will anonymize before sharing more broadly.