Lucid Facilitator's Guide

CREATE A REMOTE TEAM WORKING AGREEMENT

This template walks remote teams through the process of creating a working team agreement - a living document that sets expectations and captures agreements about how a remote team will work together. Establishing a basic set of guidelines for working together removes costly misunderstandings.

Best For

Teams with most people working remotely

12 or fewer people

Teams with **some shared tools** in place.

Contents

INTRODUCTION

Collaboration tools should help bring your team together and enhance the way you work. But there's more to working remotely than just having the right collaboration tools in place.

Good virtual team managers must foster team building, effective communication and group cohesion.

So how do we get every team member on the same page?

Start by creating a "team agreement."

A team agreement is a living document that sets expectations and captures agreements about how a remote team will work together. When we establish a basic set of guidelines for working together, we can remove costly misunderstandings.

Please remember, a team agreement is a "living document". It's important to re-evaluate the team agreement on a regular basis.

THE AGENDA

① **Welcome**

② **Silent Brainstorming**

③ **Share & Discuss Answers**
- What kinds of information do you need to share?
- How will we communicate with each other?
- What response times do you expect?
- How will you know what's being worked on?
- Do we need to set core hours or can all work be done asynchronously?
- How will we give each other feedback?

④ **Review & Finalize Agreement**

STEP-BY-STEP INSTRUCTIONS

Before the meeting

Adjust the meeting duration to fit your team.

During this meeting, the team answers 6 questions about how you'll work together.

- If your team works in a mostly standard way, plan 5 to 10 minutes per question.
- If everyone works in their own special way, add more time to the agenda.

Be sure to schedule your meeting and send invitations **at least 1 day in advance**, and turn reminders on. This will make sure everyone gets an email 10 minutes before the meeting, in case they forgot to add their update.

We recommend using a video conferencing tool for audio in this meeting, such as appear.in, Google Hangouts, or Zoom.us.

TIP
Although not required, this meeting works best when **everyone individually brainstorms ideas in advance.** When this happens, you can skip the 10-minute silent brainstorm during the meeting, and jump right into creating your agreement.

During the meeting

Good News!
The online agenda includes all the instructions you need to run this meeting.
Here are a few bonus tips.

1

Welcome

Use this item to get everyone online. The agenda explains the purpose of the meeting and expected result. If your team benefits from seeing examples, consider sharing an example agreement now.

Ask if everyone already wrote answers to the questions in the agenda. If they did, skip directly to agenda item 3.

If not, make sure they have a blank document ready, and **click "Next >"** to move to the next item and start the silent brainstorming timer.

2

Silent Brainstorming

Everyone answers each question in a separate document. When they're done, they should **type "Done" in chat**. Sometimes people forget, though, so watch your video conference for people who look like they've finished writing and are now surfing.

When everyone types Done or the timer runs out, **click "Next >"** to begin sharing answers.

3

Share and Discuss Answers

You'll walk through each question in order. Before you start, decide who will be repsonsible for writing the final team answer to each question.

Then **click "Next >"** to go to the first question.

3

For each question:

1. Everyone pastes their answer from silent brainstorming into a new note.

2. Discuss the answers. Talk about common themes you see and any place where you disagree. Add anything that comes up in the discussion that you need.

3. The designated agreement writer captures the final group answer and **tags it "Agreed"**.

For this one, we found it easiest to turn the question into a statement, then add the specifics below that. For example, "**What kinds of information do you need to share?"** might become **"We need to share:"** with your list following it.

4

Review and Finalize Agreement

Everything your group tagged as "Agreed" will appear in this agenda item. Take another look at the whole list to make sure it makes sense, then assign somone to create and post the final agreement where everyone can find it later.

Then, thank your team and **click "End Meeting"**. You're done!

After the meeting

Send out the follow-up email, which makes sure everyone gets a thank you and a full report in their email, even if they couldn't attend the meeting.

AFTER THE MEETING: HOW TO USE A TEAM AGREEMENT

Use your agreement to:

Teach new team members how you work.

Settle disputes and clear up misunderstandings.

There are, of course, more issues or topics that can be clarified as you go, and this will happen over time as the team continues to grow and develop. Ask one person to keep the agreements documented and updated on a regular basis.

Review and update your agreement as a team:

Every 6 months.

When considering new collaboration tools.

A rule of thumb in the remote world is that every time someone joins or leaves a team, it becomes a new team. And while a team agreement should be reviewed regularly, it doesn't need to be reviewed every time the team changes. It can be good to wait to review the team agreement after hiring, because it gives people a chance to settle in and get going.

RESOURCES FOR ACHIEVING MEETING MASTERY

Websites

"Creating Agreements with Your Remote Team"
http://www.happymelly.com/creating-team-agreements-for-your-remote-team/

The Collaboration SuperPowers Podcast, "How To Create A Team Agreement For Your Remote Team"
http://www.collaborationsuperpowers.com/42-how-to-create-a-team-agreement-for-your-remote-team/

Lucid Meetings example,
"Our Remote Team's Working Agreement"

http://blog.lucidmeetings.com/remote-team-working-agreement-example

ABOUT THE AUTHOR

This template was designed by Lisette Sutherland.

Lisette helps teams work together from anywhere with online and in-person workshops and by sharing best practices and inspiring stories. Her goal is to get the best people working together regardless of location.

She is working on a book called "Collaboration Superpowers: Stories of remote teams doing great things".

Learn more at CollaborationSuperpowers.com