

Team-level agreements

Customizable template

What is this document?

This template is for teams to create and document team level-agreements. Team level-agreements (sometimes called “Team Norms,” “Team Working Agreements,” or “Team Operating Manuals”) are a set of guidelines that establish a working environment and allow teammates to understand how to work with one another. The goal of this document is to inspire trust, create clarity and unlock performance on teams.

This template is designed to be flexible; please modify the template or add sections to meet your needs. Be mindful to share the document with all team members, and keep your agreements updated by soliciting feedback from new members who join your team.

Keep in mind...

In our digital-first world, the most successful teams are flexible, connected and inclusive. Your team norms should accommodate a wide range of situations, including team members who:

- **Joined the company during the pandemic...**
 - and hope to join office culture.
 - and plan to remain remote.
 - and plan to work from home some days and the office some days.
 - and aren't sure yet what they want to do.
- **Were remote workers pre-pandemic...**
 - and hope to join office culture going forward.
 - and plan to remain remote.
 - and plan to work from home some days and the office some days.
 - and aren't sure yet what they want to do.
- **Were office workers pre-pandemic...**
 - and hope to join office culture going forward.
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 - and plan to work from home some days and the office some days.
 - and aren't sure yet what they want to do.

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✨ **Values: What do we value in our working environment as a team?**

As a team, we value working in an environment that...

- **Example:** Allows everyone to participate fully whether in-person or remote
- **Example:** Encourages continuous feedback
- **Example:** Prioritizes and honors focus time

💡 **Tip:** You may find that company values are a good starting point for the team values discussion, especially if your company has built and communicated a set of principles & guardrails for flexible work that point to more specific flexible work values.

🔧 **Schedules & meeting hygiene: How will we collaborate?**

*As a team, we have the following norms around our **schedules**...*

- **Example:** Core collaboration hours - We expect team members to be available for in-sync work between the hours of 10am-2pm PT, Mondays through Thursdays
- **Example:** Dedicated focus time - We prioritize and dedicate 2-hour focus time blocks from 1-3p PT, every weekday
- **Example:** Notifications - We default to notifications off during non-core collaboration hours or focus time
- **Example:** Response time - We set clear expectations for who needs to respond and when, and we reserve off-hours escalations for truly urgent issues, via text or phone call

💡 **Tip:** Depending on your team, you may find that core collaboration hours are easier to define and manage versus trying to have a “no meetings Thursday” block, or vice versa! These agreements are not set in stone, and teams often find themselves experimenting and iterating with these initial arrangements as they settle into a working cadence.

As a team, we have the following norms around our **meetings and communication expectations...**

- **Example:** One dials in, all dial in to a meeting to ensure that everyone is participating on an equal playing field
- **Example:** We commit to creating agendas at least 24 hours in advance for all live (or synchronous) meetings
- **Example:** Notes from meetings are always documented and shared back to the team
- **Example:** More than two of us invited to another internal team's meeting? Others should feel free to decline

💡 **Tip:** Meeting hygiene is a universal need, not just to make flexible work successful. Teams find that meeting and communications hygiene requires regular practice and pruning. "Meeting-creep" happens all too easily, and teams find it useful to dedicate time (e.g. monthly or quarterly) to review how they're doing and where they can be more proactive in decreasing meeting load (and related, zoom fatigue) while increasing dedicated focus time for deep work.

Accountability: How do we hold each other accountable?

As a team, we want to **set expectations and hold each other accountable** in the following ways...

- **Example:** We clearly define work and deliverable requirements from the beginning, including a primary owner (also known as a "DRI - directly responsible individual")
- **Example:** We commit to making it clear when we need feedback (from whom and when)
- **Example:** Every major project will have retrospective meetings to reflect on what went well, what could've been better, and what we've learned

💡 **Tip:** Flexible work is successful if teams are measuring success by outcomes, not by how many hours someone is working in a day. To do that, teams need to focus on defining outcomes, roles, and responsibilities upfront and over-communicating as changes and different needs arise. To learn more about measuring to outcomes, check out our [PLAYBOOK: Measuring success in a digital-first world](#).

Relationships: Coming together as a team

*As a team, we want to **build our relationships** with each other in the following ways...*

- **Example:** When it comes to bringing ourselves to work, we embrace vulnerability with boundaries. We operate from a place of trust — we can speak openly about our lives outside of work.
- **Example:** We commit to celebrating one another's successes both publicly and within the team.
- **Example:** We commit to being open and honest about when we are overloaded or need support, both personally and professionally.

 **Tip:** Focus on building team connection first within your immediate team, but consider expanding these agreements over time to find ways to intentionally connect with other teams across the organization (e.g. bringing in more regular guest speakers to team meetings, supporting more cross-team mentorship with senior leaders, and leveraging technology like Donut for adhoc coffee chat pairings).

Checking-in and evolving our team agreements over time

As a team, we want to check in on how things are going by...

- **Example:** Spending part of our team meeting every month discussing our team-level agreements and getting feedback on what is & isn't working
 - **Example:** Creating a quarterly poll to get anonymous feedback across our department on our team-level agreements, and suggestions for improvement
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