

How to Facilitate Team **Work** Agreements



A Practical, **10-Step Process** for Building a
Right-Minded Team That Works *as One*

DAN HOGAN

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A Practical, 10-Step Process for Building a
Right-Minded Team That Works as One

*Do No Harm.
Work As One.®*

By
Dan Hogan
Certified Master Facilitator

Dear Reader, This
Sample gives you two
very practical sections:

- Page 18 – Two Agreement Types
- Page 25 – a Narrative Overview of the 10 steps

...that help you help
the team to Do No
Harm and Work as
One.

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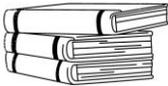
Work Agreements & the RMT Process

The Right-Minded Teamwork framework includes 5 Elements. Two are goals, and three are methods to attain those goals.

Work Agreements are the third Element of Right-Minded Teamwork's 5 Elements model.

All 5 Elements work together to ensure a team achieves the business goal of 100% customer satisfaction, as follows:

1. Team **Business Goal**: Achieve 100% Customer Satisfaction
2. Team **Psychological Goal**: Commit to Right-Minded Thinking
3. Team **Work Agreements**: Create & Follow Commitments
4. **Team Operating System**: Make It Effective & Efficient
5. **Right-Minded Teammates**: Strengthen Individual Performance



To Learn More...

For a more detailed description of RMT's 5 Elements framework and process, go to RightMindedTeamwork.com, and pick up your copy of ***Right-Minded Teamwork in Any Team: The Ultimate Team Building Method to Create a Team That Works as One.***



Applying RMT: 12-Step Workshop Design Process

There are two ways to apply RMT's 5 Elements within your team. You can facilitate the process yourself, or you can engage a team-building facilitator.

No matter which path you choose, you will increase the likelihood of a successful team-building event by using RMT's 12 Steps. If you decide to hire a facilitator, ask them to follow RMT's 12 Steps.

Let's briefly look at the Implementation Plan and the 12-step design process now.



Right-Minded Teamwork Implementation Plan

What is the best way to apply RMT in your team? There is no one answer to this question. However, the three-workshop plan presented here has proven effective countless times. As a key part of RMT's 5 Elements model, you'll notice Work Agreements are incorporated right from the start.

First Workshop – Work Agreements

- Identify team psychological goals and values (Element #2)
- Create at least one team Work Agreement (Element #3)

Second Workshop – Operating System

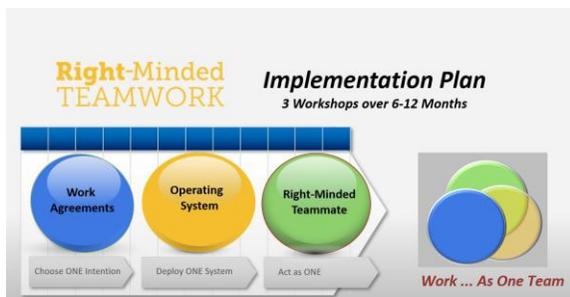
- Reset and reaffirm business goals (Element #1) and agree on the Team Operating System (Element #4)

Third Workshop - Teammates

- Conduct a Right-Minded Teammate development workshop (Element #5).

90-Day Operating Plan - Ongoing

- Every 90 days, conduct another *Team Performance Factor Assessment*, and then the team meets to assess progress, identify opportunities, take action, and achieve new teamwork improvements.



Work Agreements Require Right Attitudes

Creating and living team Work Agreements is necessary for establishing Right-Minded Teamwork.

To create Work Agreements, your team must first identify the "right" attitudes for the team. Those attitudes form your team's collective, consciously chosen **thought system**. They describe how you will do no harm as you work as one.

Your team's initial set of Right-Minded attitudes is agreed upon during your first team-building workshop, during which you also create your first Work Agreement. After that, they may be adjusted and updated on an as-needed basis.

Meet Your Decision-Maker

The Right-Minded Choice Model teaches that you are the **Decision-Maker**. In every difficult situation, there are two ways you can choose to respond.

At all times, you are mindful, or you are mindless. You are either following your Right Mind, Reason, or your wrong mind, Ego.

When a challenging situation happens, you either:

- accept Ego's guidance and act like a victim or victimizer, or
- embrace Reason and act in an accountable, Right-Minded way, as described in your team Work Agreements.

Even though there are many variations of those two choices, ***there are still just two.***

Successful Work Agreements describe how teammates make the Right Choice.



For the background story behind the **RMT Choice Model**, read the RMT book ***Reason, Ego, and the Right-Minded Teamwork Myth***. This short story introduces the three characters who live in every teammate's life: Reason, Ego, and the Decision-Maker.

Two Ways to Choose Right-Minded Attitudes for Your Team

Your team's list of "right" attitudes can be short. After you create these values and norms, you will commit to actively living them. Your attitudes and commitment to living them are transformed into your team's written Work Agreements.

Here is an example.

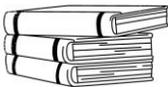
We choose these Right-Minded attitudes as our psychological goals:

- *We accept 100% accountability and responsibility for our thoughts and behaviors.*
- *When we make mistakes, we never punish. We learn. We recover. We do no harm. We work as one.*
- *We positively acknowledge and reward each other.*
- *We are we-centered, never self-centered.*
- *When difficult team situations happen, we accept, forgive, and adjust our attitudes and behavior. We always find solutions because we believe that none of us is as smart as all of us.*
- *When new teammates join our team, we will share these goals and ask them to choose them, too.*

There are two ways you can identify the “right” attitudes and psychological goals for your team.

1. Share the Right-Minded Teammate Attitudes & Behaviors list with the team (see below). Allow teammates to choose a few from that list. Or use those ideas to create goals that fit your team better.
2. Share the Right Choice Model (as described in the RMT book *How to Apply the Right Choice Model: Create a Right-Minded Team That Works as One*).

In a team event, collectively agree on a list of accountable attitudes and work behaviors your team believes will help address your teamwork issues and sustain RMT.



To Learn More...

To learn more about presenting and teaching the Right Choice Model, go to RightMindedTeamwork.com or your favorite book retailer, and pick up your copy of *How to Apply the Right Choice Model: Create a Right-Minded Team That Works as One*.

Real-World Applications for Right Choice & Work Agreements

The **Right Choice Model** and team **Work Agreements** are perfect for those situations where logic and other fact-based processes don't work. Here are several instances where these tools lend themselves well.

Team Building – When a team is "storming," the Choice Model and Work Agreements will help you facilitate a positive recovery in team members' attitudes and behaviors.

Benefit: The team focuses its energy on accomplishing real team business instead of complaining about other team members.

Leadership Development – Successful leaders guide their direct reports to higher and higher levels of accountability, which is an inherent result of Right Choice and Work Agreements.

Benefit: The team addresses problems head-on versus whining and complaining about difficult work situations.

Safety – This Choice Model is a perfect companion for behavioral safety strategies and training programs because “choice” is the precursor to “safe” behavior.

Benefit: Adds the final layer of understanding in safety training by establishing a "thinking system" clearly defined in the team's Work Agreements.

Diversity – A lack of willingness to embrace diversity indicates wrong-minded, victim/victimizer choices. Introducing the Right Choice Model raises awareness of these choices in a gentle way and creating Work Agreements clearly establishes a culture of equality.

Benefit: Surfacing existing disconnects between teammates and addressing them in a forgiving way allows for higher levels of collaboration.

Alliance Partnerships – Too often, partnerships break up or fail to meet expectations because of the business' attitudes and behaviors. Using the Right Choice Model allows partnership issues to be addressed in an emotionally mature way, and Work Agreements can capture agreed-upon ways of collaborating moving forward.

Benefit: By redirecting dysfunctional behaviors, new energy can be put towards accomplishing the alliance's work.

Change Management – Consultants and leaders can use the Choice Model and Work Agreements to accomplish new change initiatives.

Benefit: This Choice Model and team Work Agreements increase the likelihood of achieving success by gently removing restraining forces.

Individual Effectiveness – We all feel and act like victims from time to time; the key is not getting stuck in “victim headspace.” To avoid getting stuck, we must identify those situations that drive us into wrong-mindedness.

Benefit: The Right Choice Model, when used as a personal assessment, helps you identify personal emotional triggers, which is the first step in effective change management.

Outsourcing – When outsourcing must happen, the Choice Model and Work Agreements will help ensure a smooth transition.

Benefit: By identifying those who are more apt to accept and embrace change (versus those who believe they deserve special treatment) and clearly communicating the choices and attitudes that are expected, outsourcing is more likely to succeed.

Other – The possibilities for the Right Choice Model and Work Agreement process are genuinely endless. In any conflict situation, these tools will assist in facilitating positive transformation.

The Work Agreement Facilitation Process

Now that all teammates have chosen their Right Attitudes and embraced the Right Choice Model philosophy, you are ready to create your Work Agreements.

Nearly all teamwork issues can be addressed and resolved with Work Agreements.

Two Types of Work Agreements

A **process Work Agreement** describes who will do what and the work methods they will use. It defines work tasks in terms of roles, responsibilities, interfaces, or procedures.

One essential process Agreement is a team's Decision-Making Work Agreement. RMT advocates every team create such an Agreement as early as possible. Without one, the team will likely encounter many unnecessary interpersonal dysfunctions and work mistakes. We'll talk more about Decision-Making Agreements in a moment.

A **behavioral Work Agreement** describes how people will behave while they perform their tasks, such as the ways teammates will bring to light, communicate, and resolve difficult performance issues or interpersonal conflicts. This type of Work Agreement aims for transparency in all such interactions.

A Work Agreement that is wholeheartedly agreed upon includes an **Intention** statement that defines your team's choice as well as **Clarifications or Conditions** for acceptance. Here is an example.

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Intention:

1. Each teammate will communicate their thoughts and feelings in appropriate ways.

Clarifications or Conditions:

- A. We follow the spirit and intent of our company values.
- B. If we believe another person is communicating inappropriately, we will call it to their attention in private.
- C. Even though this Agreement addresses inappropriate communication behaviors, we also agree to give positive teammate reinforcement when we see and hear excellent communication.

Below you will find two real examples of Work Agreements. The first one is a **behavioral** team communication Work Agreement. The other is a **process** Work Agreement around decision-making.

I worked with this team for a few years. These were phenomenally successful Work Agreements because teammates passionately created and actively lived them day in and day out.

The communication Work Agreement directly below is also used as a teaching device in this book. In the pages to come, I will show you how that team created this Agreement.

Real Team Work Agreements

Behavioral Agreement – Communication

Team Choice: Intention Statement

1. Each teammate will communicate in a respectful way.

Clarifications / Conditions for Acceptance:

- A. We will use good communication techniques that include appropriate body language and tone of voice, plus suitable words.
- B. If we see or hear disrespect or we hear an inappropriate behind-the-back conversation, we own it and need to step in.
- C. If someone unintentionally shows disrespect, we will give them the benefit of the doubt, let them know, and create a new way to interact going forward.
- D. We will actively support team decisions in word, deed, and energy; we will use our decision-making protocol agreement for key decisions.
- E. We will be on time for meetings.
- F. We will ask, "May I interrupt you?"
- G. We will use observable facts during disagreements and decision-making, and we will acknowledge when we are using assumptions.
- H. We will understand each other's roles, ask for help if we need it, share relevant information and if helpful, give constructive feedback in private.
- I. If someone continues to break this agreement, we will tell them that we will invite a third party to help if there is continued disagreement. If that doesn't solve the issues, we will all go to a higher authority for support and resolution.

Process Agreement – Decision-Making Protocol

Team Choice: Intention Statement

2. We will go for consensus for all key team decisions, but our fallback will be that Maria [team leader] will decide if we cannot reach a consensus.

Conditions for Acceptance / Clarification

- A. Before entering a discussion, we'll agree on the decision-making method and fall back, plus when [date] a decision will be made.
- B. Before delving into a solution, we will create an opportunity or problem statement.
- C. At the beginning of our discussion, we will determine boundaries & givens (i.e., time sensitivity; cost, hassle, impact, 80% or 100% perfect decision, etc.).
- D. We provide a business case (appropriate justification) for our decision, including cost/benefit.
- E. During our conversations, we will advocate and inquire. We will not hold back. For instance, we will acknowledge assumptions and facts.
- F. To create the best solutions, we will also think about alternative ways to test our solution (Devil's Advocate).
- G. If we find ourselves at an impasse, we will call a "time out" to calm down or acquire more technical information.
- H. When a decision is made, we will accurately represent and support the decision.
- I. We do this agreement because we want to improve teamwork and trust in one another.
- J. We will hold ourselves and others accountable for living the letter and the spirit of this agreement; we will fine-tune it as necessary

Facilitating Work Agreements: Don't Do This!



A Reason-able idea...

Don't present another team's Agreements to go by.

As an aspiring Work Agreements facilitator, it is advantageous to review and learn from other teams' Work Agreements, especially to understand what worked and didn't work.

However, I cannot overemphasize the importance of *not* making it a standard practice to present another team's Work Agreements as "go-by" examples during facilitation.

Each team needs to invest *its own efforts* into *its own Work Agreements*.

Teammates who put genuine effort into discussing and agreeing on how they will resolve their particular team challenges increase the likelihood of actually *living* their Work Agreements going forward.

Why? Because they worked hard to create their Work Agreement. They agreed that living them is in their best, shared interest. They know their unique Work Agreements have not been imposed on them arbitrarily.

There's also one more thing you should not do: Don't announce or explain the 10 Steps outlined in this book to teammates. These 10 Steps are designed to help you plan, organize, and efficiently facilitate the Work Agreement process.

Facilitation: Do This!

When your team creates its first Work Agreement, remember:

1. It always takes longer to facilitate a team's first Work Agreement.
2. As the facilitator, you want to be on the lookout for your chance to help the team create a “moment of Reason” amongst themselves.

Why the First Work Agreement Takes Longer

The first time around, teammates will not be familiar with the Work Agreement process, so everyone will be learning as they go. Teammates also won't have had a chance to experience the effectiveness of Work Agreements for themselves yet, either. After they finalize their first Work Agreement, the team will take much less time discussing and creating future Agreements because they will clearly understand the process and understand the benefits.

As you introduce the concept of Work Agreements for the first time, aim to create only one or two key Work Agreements. Keeping things simple will allow the team to learn the process and still come out of their team workshop with actionable Work Agreements. If more are needed, they can always be created in subsequent workshops.

It's also practical for teammates to think of their Work Agreements as *evergreen*. If they determine their Work Agreements are not quite right or don't accomplish their desired outcome, Agreements can and should be modified. It's worth noting that **process Work Agreements** usually require fewer modifications after the workshop than **behavioral Work Agreements**.

Creating a process Work Agreement is also typically a little easier to facilitate because it deals with relatively impersonal policies, procedures, or methods. Most people are more comfortable discussing these topics than delving into interpersonal issues or explaining how they should behave. Later in this book, when we get to the detailed explanation of the 10 Steps to create team Work Agreements, you will read a true story that illustrates this common reaction.

The process of turning day-to-day activities and decisions into a future-state flow chart with your team is usually not emotional or confrontational. But when a team is faced with difficult human interaction issues such as low trust, poor communication, toxic behavior, personality conflicts, or lack of accountability, and you are creating behavioral Work Agreements, different perspectives can easily be interpreted as judgmental, which often leads to more self-perpetuating dysfunction.

However, both process Work Agreements and behavioral Work Agreements have their place. Process Agreements are used to solve teamwork workflow issues, and behavioral Agreements are best used to identify and describe interpersonal behaviors the team will use to resolve their conflicts.

Facilitating Work Agreements — A Brief Narrative Overview

Below, you will find three versions of the 10 Steps to creating team Work Agreements:

- a short, narrative description of the Steps
- a graphical representation of the process including real-world examples of the flipcharts created during each Step
- a detailed description of each of the 10 Steps.

By the end of this section, you will have a clear understanding of what it takes to facilitate team Work Agreements.

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Let's start by assuming a team leader has decided to conduct a one-day RMT Work Agreements workshop and has asked you to facilitate it. Here are your preparation and facilitation steps.

First Decide: In-Person or Virtual Workshop?

An in-person workshop is a superior choice because teammates can see and feel each other's attitudes and behaviors, which supports the creation of solid, all-in Work Agreements. However, if you must conduct a virtual workshop, the principles, concepts, and steps presented here still apply. Use a video software conferencing platform to ensure all participants can see each other and a virtual flipchart for capturing your team Work Agreements.

Preparation Steps 1-3

Take these three steps before the workshop.

1. Agree on the first teamwork topic to address, which will result in a Work Agreement.
2. Determine the topic's desired outcome.
3. Design an opening question to be asked to kick off the topic dialogue.

In **Step 1**, the team leader informs you, the facilitator, what they want to achieve and why. Often, some difficult situation has occurred that has precipitated the desire for this workshop.

After you understand the leader's desired teamwork outcomes, you interview all teammates to understand what they want to achieve and why.

After the teammate interviews, you share the team's collective input with the leader, which results in selecting the teamwork topics to address in the first workshop.

In our teaching example, we will focus on two specific teamwork outcomes for our workshop: improving communication and improving team decision-making. The first is a behavioral issue, and the second is a work process issue.

In **Step 2**, an agenda is created that includes the desired outcomes.

In **Step 3**, an opening question is created for both issues: communication and decision-making. As the facilitator, you will ask these questions to launch a team discussion that, eventually, leads to one or more Work Agreements.

Facilitation Steps 4-10

4. During your workshop, when the time is right, ask the opening question for your topic.
5. Capture legitimate behavioral answers on a flipchart.
6. Write and propose an intention statement.
7. After a short dialogue, ask if teammates agree to live the intention.
8. Write clarifications and conditions for acceptance.
9. Create an interlocking accountability condition.
10. When everyone approves the Work Agreement, celebrate. Then move to the next topic.

The Workshop

Imagine you are 10 minutes into your workshop. The team leader has welcomed everyone. All teammates have agreed to the desired teamwork outcomes as well as the agenda, ground rules, and the day's logistics.

Before you ask your opening question, take five minutes to introduce or review the Right Choice Model. Your goal is to present the Model in such a way that when you finish teaching it, all teammates declare,

Of course, we need to approach [our issue] in a Right-Minded, accountable way. Let's get started.

Alternatively, the team leader may present the Right Choice Model by relating it to a current team challenge.

To learn more about the Right Choice Model and how to apply it in your team, go to RightMindedTeamwork.com or your favorite book retailer, and pick up your copy of *How to Apply the Right Choice Model: Create a Right-Minded Team That Works as One*. Within the book, look for the section titled, “How to Present & Apply the Right Choice Model in Your Team.” There, you will find specific instructions on how to present the Right Choice Model successfully.



Once the team agrees to take a Right-Minded approach to address their issues, you are ready for your opening question.

Asking the opening question, **Step 4**, should invite an honest discussion on the first teamwork topic. For example, if improving team communication is the desired objective, you might ask, “*If we communicated respectfully, what would you see or hear teammates say or do, or not say or do?*”

Up to this point in the workshop, you, the facilitator, have been doing most of the talking. After asking the opening question, you move into listening, observing, and facilitating.

Now that the opening question has been asked, you listen to the team's discussion, which may last 30 to 60 minutes. All the while, you capture legitimate behavioral answers on a flipchart - **Step 5**.

In **Step 6**, while teammates continue to discuss their workshop topic, you think about and write an intention statement. The proposed statement should evolve from the team's list of behavioral answers. When the time is right, you suggest the intention statement, which, in our example, might sound like, “*Each teammate will communicate in a respectful way with each other and our customers.*”

In **Step 7**, you ask teammates if they will agree to live the proposed intention. Most of the time, teammates agree, though they may assert it needs more work. This brings you to Step 8.

In **Step 8**, the team discusses their specific clarifications or conditions for acceptance of the intention statement. As teammates add and edit their conditions, you periodically ask them, *“If you truly lived your Work-Agreement-in-progress, would you achieve your desired outcome?”* Most of the time, they will say yes. This “yes” motivates the team to continue making the “right” Agreement for the team.

Finally, **Step 9** calls for "interlocking accountability" within the Work Agreement - a key part of encouraging the team to live their Agreements day in and day out. Fortunately, you will only need to create interlocking accountability once as it will apply to all Work Agreements.

For a real-world example of interlocking accountability, revisit the “Real Team Work Agreements” several pages back, and look at the final condition in the behavioral communication Agreement.

In **Step 10**, every teammate publicly commits to hold themselves and others accountable for upholding the team Work Agreement. At this point, everyone should genuinely believe the Agreement will help the team achieve its goals.

NOTE: It is not unusual for teammates to break their Work Agreements after the workshop. Often, this breach is just an honest mistake, or a habit not yet transformed. However, if a teammate continues to break a Work Agreement, the team should have an agreed-upon condition that clarifies how they will confront one another. This is the interlocking accountability condition created in Step 9.

Key Work Agreement Facilitation Questions

Work Agreement facilitators ask helpful questions before and during the workshop. Use the below resource to encourage and support your team through each of the 10 Steps.

<p>1. Agree on the first teamwork topic.</p>	<p><i>What teamwork issue do you want to address in the workshop? What would be your desired outcome?</i></p>
<p>2. Create the topic's desired outcome.</p>	<p><i>If our team failed to discuss and agree on how to improve [desired outcome], what would go wrong?</i></p> <p>Answers to this question will help you and the team leader to create preventions and interventions.</p>
<p>3. Design an opening question.</p>	<p><i>If the team was doing/achieving the desired outcome, what behaviors would we see or hear teammates doing?</i></p>
<p>4. Ask the opening question.</p>	<p>For example, <i>If we communicated respectfully, what would you see or hear teammates say or do, or not say or do?</i></p>
<p>5. Capture behavioral answers.</p>	<p>Ask clarifying questions to make sure you are not interpreting answers.</p>
<p>6. Propose an intention statement.</p>	<p>What is the team's overarching intention? What behavior would most of them agree to keep, and would it provide a context for the other behaviors?</p>
<p>7. Ask if it will work.</p>	<p><i>If all of you really and truly lived this Work Agreement Intention, would it resolve your issue?</i></p>

<p>8. Write clarifications or conditions for acceptance statements.</p>	<p>Use only one or two of these questions.</p> <ul style="list-style-type: none"> A. <i>Is this intention practical and doable in your work environment?</i> B. <i>What would prevent you from doing/living this intention 100% of the time?</i> C. <i>Is there a time, situation, or condition when this intention would not work?</i> D. <i>Is there any situation where you would not feel safe keeping this Work Agreement?</i> E. <i>What internal or external constraints would get in the way of keeping this Agreement?</i> F. <i>Is there anything or anyone that would prevent you from keeping this Agreement?</i> G. <i>Is this a clear intention or Agreement? Does anything need editing?</i> H. <i>Is everyone clear about what behavior is expected of each teammate?</i> I. <i>What do you think? Is this Work Agreement complete? Do you believe everyone understands what we're all agreeing to do?</i>
<p>9. Create interlocking accountability.</p>	<p><i>If someone continues to break this Work Agreement, we will...</i></p>
<p>10. Ask them if they will live it.</p>	<p><i>Will this Work Agreement succeed, and will you keep this Agreement going forward?</i></p>

Work Agreements: How to Sustain Them

How do teammates successfully live and sustain their new Work Agreements?

They periodically review and modify them.

Below are specific ideas on how to do just that, followed by a checklist of Work Agreement questions to help you ensure you've created solid, realistic Agreements that will work for your team. After that, you'll find a real-world story about a team's journey to creating their Work Agreements, including a true "moment of Reason."

Ideas for Sustainable Agreements

1. A week after creating the Agreements, the entire team spends 15 to 30 minutes reviewing their Agreements to:
 - a. be certain all teammates understand the desired agreed-upon behaviors
 - b. modify Agreements if necessary
 - c. recommit to living the Agreements going forward

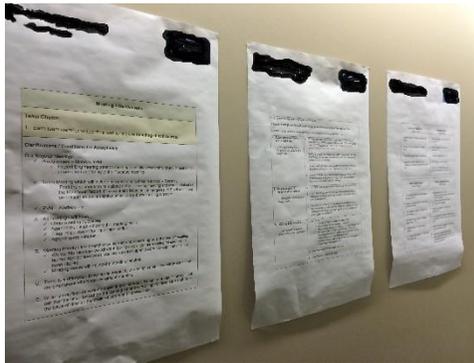
2. The team also conducts a more thorough review of their Agreements every 90 days.
 - a. If your team uses RMT's 90-Day Team Operating System, you are applying the *Team Performance Factor Assessment*. Performance Factor #25 asked how well your teammates are living your Work Agreements.
 - b. It's not unusual for teams to keep their Work Agreements for a year or more. However, when all teammates truly live them, in time, it's okay to delete an Agreement or meld part of one Agreement into another.
 - c. Said another way, Work Agreements are evergreen. They can live on, be modified, or even be happily released once they have achieved their outcome.

3. Use the *Work Agreement Checklist* below in your reviews.

4. Between reviews, teammates are encouraged to acknowledge other teammates for keeping the Agreements.
 - a. This is practical positive reinforcement, a win-win for everyone. It's an emotionally mature, Right-Minded way to treat each other.

5. If your team conducts regular meetings, consider holding a one-minute "Agreement review" of one Agreement at the beginning of each session.
 - a. You can do this for a month or two until the Agreements are well understood and followed. This is another opportunity to give positive reinforcement to specific teammates.

6. Consider posting your Work Agreements in your team meeting room or in a visible place where the Agreements can be easily and frequently seen. Here is a photograph of one team's three Work Agreements.
 - a. Consider asking teammates to include their Work Agreements in their performance reviews.



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