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Team Agreements
Facilitator Guide

Everything you need to plan, prepare, and run a collective standards session with your team

⏰ 90 mins - 2 hours | 👥 Up to 12 People | 📋 Use with the Team Agreement Canvas

What it is and what it isn't

A team agreement is a working document. It answers two questions: why does this team exist, and how do we operate?

The agreement only works if the team builds it together. Your job as the leader running this session is not to have all the answers. It is to hold the space, keep the conversation specific, and make sure every voice is in the room before you land on anything.

FOCUS ON BEHAVIOURS

Get specific, make sure we are being 'low context' and focusing on how we know that agreement is being met or not. Focus on behaviours.

Watch for: "we'll communicate better", "we'll be more accountable", "we'll be more transparent." These all need a follow-up question before they go in the agreement.

Use these probes throughout the session

- *What does that actually look like day to day?*
- *What would we see someone doing?*
- *What wouldn't we be doing if this was working?*
- *Can you give me an example?*

THE TEST

Could a new team member read this and know exactly what to do? If not, it needs to be more specific.

Session at a glance

Step 1	Step 2	Step 3	Step 4	Step 5
Prep & comms	Session rules	Why we exist	How we operate	Keeping it alive

1. Designing your session

A few things are worth getting clear on before you set a date. They will shape how you run the session and what you need to prepare.

NEW OR EXISITING TEAM?

Running this with new joiners is a great opportunity; they arrive with no fixed habits yet. Do it early before patterns set in.
With grads or junior team members, you may need to be more directive but still co-create. Collective ownership matters just as much early on.

BUSINESS CONTEXT

Before the session, be clear on the overarching mission, purpose, or goals of the organisation.
Part 1 of the agreement links your team's purpose to that bigger picture. If the team can't see the connection, the purpose statement will feel disconnected from real work.

IN PERSON OR REMOTE?

In person is easier for this kind of work. If you are remote, use a shared whiteboard (Miro, FigJam) so people can see and add to things in real time.
Avoid a blank video call.

2. Your own prep

Before you sit down with your team, be clear about two things:

Your purpose statement
Draft it in one sentence. It does not need to be perfect, you will refine it with the team. What you need is a starting point so the conversation has somewhere to go.

Your 2–3 non-negotiables. These are the standards you will not flex on. Name them clearly in the session. This is not imposing; it is being honest about what you need to lead well.

WHY THIS MATTERS

Collective does not mean leaderless. You are creating the container. Showing up prepared models the standard you are asking of everyone else.

3. Before the session - Managing expectations

The goal of any pre-session communication is simple: no one should walk in not knowing what they are there for. Surprises kill psychological safety before the session even starts.
You do not need a lengthy brief. You need to cover the right things clearly.

WHAT IT IS	Tell them you are running a session to build a team agreement, a shared document for how your team works. Tell them WHY you are doing this work.
WHAT TO EXPECT	Let them know it is a discussion, not a presentation. Their input shapes the output. There are no right answers prepared in advance.
ANY PRE-WORK	Ask them to think about one thing: what is one thing about how we work that you think is working well, and one thing you think we could be clearer on? Keeping it light means people actually do it
WHAT HAPPENS AFTER	Tell them what you plan to do with the output. How will it be brought to life? People engage better when they know their input will go somewhere.

4. Running the session

For each part of the agreement, use the same basic cycle: give people time to think individually first, then open the discussion, then land on something specific before you move on.
Do not skip the individual thinking time, it means quieter voices have something formed before the louder ones take over.

> **FACILITATING THE DISCUSSION**
>
> Your job is to draw out, not drive. Ask questions more than you make statements. When the group lands on something vague, use the probe questions to push for specificity before you write anything down.

Rules of the session

Set the rules of engagement for the session, think something like:

- *We are collectively responsible for what we agree here, everyone needs to contribute*
- *Once we decide, we commit to trying it, even if it wasn't our first choice*
- *We welcome different views, they make the agreements stronger*
- *This is not forever. We will revisit, adapt, and improve*
- *What's said in the room stays in the room*
- *We are designing how we work together, not judging how we've worked before*

Why we exist

Before you can agree how you work, you need to agree why you exist. Work through three questions with the group. Let them generate first, then test each answer against reality.

- *What is the overarching mission or goal of the business?*
- *What is our core purpose? And how does it help us achieve the mission.*
- *What are our core deliverables, the 3–5 things we are accountable for?*
- *Who are our key stakeholders, and what do they need from us?*

FACILITATOR TIP

After the group generates a purpose statement, test it: does this actually describe what we do day to day? If it sounds more like a strapline than a description of real work, ask them to be more specific.

⚠️ **Watch out for:** Purposes that could apply to any team. "To deliver great work" tells nobody anything. Push until you have something that only your team could have written.

How we operate

This is the bulk of the session. Cover four areas. For each one, share your non-negotiable first, then open it to the group. Do not present your view as the answer, present it as your starting position.

CADENCE

Push for specifics: which meetings are weekly vs monthly? What is the expected response time to a message? When is it OK to be unavailable? Vague answers here create friction later.

FRICTION

What does it look like when someone challenges an idea well? What does it look like when it goes badly? Land alignment vs agreement, you do not need to agree with a decision, but once it is made, you get behind it.

COMMUNICATION

Agree on assuming positive intent as a standing principle. How do we communicate decisions? What channels do we use? How do we document? What does 'good communication' look like

OWNERSHIP

What does it look like when someone is really owning their work? What do they do that others notice? Push for specifics on flagging blockers, what counts as a blocker, when do you raise it, and how?

When the room can't agree

Disagreement will happen. That is not a problem, it is the session working. Your job is to keep it moving and make sure it leads somewhere.

HEALTHY DEBATE VS A CONVERSATION THATS STUCK

Healthy debate moves. Different views are being heard and the group is getting closer to a position, even slowly.
Stuck looks like the same argument on loop, people disengaging, or silence that is not reflection.
If you have heard the same point three times with no new information, you are stuck. Name it and move.

WHEN TO MAKE A DECISION VS KEEPING THE DISCUSSION OPEN

all it when you have enough information to act and waiting won't materially change the outcome. Keep it open when there's genuinely missing context. The test: what would we need to know to decide differently?

COMMITING TO 'AGREEMENT VS ALIGNMENT'

Make sure everyone feels heard before the decision is made, commitment is harder when people don't feel they've had a voice. Separate agreeing from alignment. You do not need to agree that it is the best option. You need to agree to try it. Set this expectation at the very start.
Always make it clear the 'why' behind the decision

Keeping it alive

Before you close the session, agree three things as a group. Do not skip this, it is what turns the agreement from a document into a habit.

1. When will you review it?
I recommend a minimum of every 6 months. If something's not working, don't wait have the conversation as soon as you can. Get your review in the diary before you leave the room.

2. How new team members get introduced to it.
Who walks them through it? When does it happen? How?

3. How do you call each other out?
What happens when someone breaks an agreement? Name the behaviour you expect, not just the intention.

Review questions

- Which of our agreements are helping us achieve our purpose?
- Which are getting in our way?
- What do we want to change, drop, or add?

After the session

Document - Memory fades fast. Use the Team Agreement Canvas as your template and fill it in while it is fresh.

Share - Sending a written version back gives people a chance to flag anything that did not land right. This builds trust in the document.

Review - Ensure this is in the diary

Onboarding - Embed it into your team onboarding. New joiners are great for challenging if it's specific enough, their questions often surface gaps.

Session prep checklist

- [ ] Book a space that works for the format (in person preferred)
- [ ] Send pre-session comms with context and light pre-work
- [ ] Get clear on the overarching business mission or goals
- [ ] Write your own purpose statement draft, anchored to the business context
- [ ] Identify your 2–3 non-negotiables
- [ ] Print or share the Team Agreement Canvas

You've got this.

Running a session like this takes courage. You are asking your team to be honest, to commit to something together, and to hold each other to it. That is not a small thing.

If you want a thought partner before you go in, a debrief after, or support building out what comes next for your team, I've got you.

Book a call

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