**Build Your Collaborative Plan**

At a team meeting, discuss your Goals, Roles, Procedures & Relationships, using the prompts you see below. Document your discussion and agreements by filling in the Collaborative Plan Template on page 2. The template expands: use as many pages as you need.

|  |
| --- |
| **Collaborative Plan Prompts** |
| **Goals** | * What are the **personal goals (small g) of each member on this team**? (Team Member #1,#2, #3, etc: 1 or more goals/ name)
* What is the **Project GOAL (big G)** we’re all committed to achieve together?
* Is our **Project Goal scaled** to our resources (dreams, materials, skills, differences, etc.) and constraints (assignment, time, skills, etc.)
* What are the **metrics for success** for what we’re producing?
 |
| **Roles** | * **Who** is responsible for **which deliverables?**
* **Which deliverables** that require **collaboration, subgroups & individual work? Who** does each person **depend upon to succeed?**
* Do we need a **project manager** to coordinate?
* What are the **deliverables each person** is accountable to produce?
 |
| **Procedures** | * **Decision Making -** What **process** shall we use: consensus, majority rules, deference to expert, default to the loudest, or?
* **Effective Meetings -** Focus on key, timely decisions together vs. status/update (offline);
* **Meeting roles:** scribe, facilitator, time keeper
* **Communication - FTF:** frequency, time, location**; type of technology:** (Googledocs, Hangout, etc.); **expectations for responsiveness; ‘best time to work’** (AM, PM, weekends?)
 |
| **Relationships** | * **Team Diversity** – What is the diversity on our team? Disciplines to tap for solutions; individual earning styles for the stages of invention; overall team learning style strengths and places to supplement; cultural backgrounds , work experience, dreams to leverage for scope & impact of goals, new roles, better procedures; languages for more diverse customer set, bigger market;
* **Listening** – Notice my binary thinking, auto-rankism, and go beyond it.
* **Team Name**–What’s a **team name** that captures who we are and what we’re going to do?
 |

|  |
| --- |
| **Team Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Goals** | <complete this template> |
| **Roles** |  |
| **Procedures** |  |
| **Relationships** |  |