**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.

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| **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? |

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