turning people into teams

Rituals and Routines That Redesign How We Work

DAVID & MARY SHERWIN

Praise for *Turning People into Teams*

"Bringing together people with different perspectives and areas of expertise is always a challenge. In Turning People into Teams, the Sherwins equip teams with the context and exercises needed to help them understand each other, break down barriers, and align on long-term goals. Using these exercises with my company's cross-disciplinary teams of designers, engineers, product managers, and data scientists has already led to several breakthroughs in how we identify goals, share feedback, and work together."

—Patrick Weiss, Director of Product Design, Omada Health

"In Turning People into Teams, the Sherwins share practical rituals, routines, and activities that help teams understand what it means to exhibit ownership, values, and integrity as individual contributors to a collective effort. Curating best practices from corporations, nonprofits, and academia, this book has insights into building effective teams and transforming how they work."

—Ratna Desai, Director of Product Design, Netflix

"When working on teams, you might not always get to choose whom you work with—but you should definitely choose to read this book. Turning People into Teams enlightens the reader with an inspiring, common-sense approach on how to turn a group of individuals into a team that functions on multiple levels. The Sherwins practice what they preach, and this book gets rid of the fluff and provides a practical mindset and corresponding tools to evaluate your team's rituals, behaviors, and values. They prove that it's possible for almost anyone to learn the etiquette of collaboration."

—Alie Rose and Simona Maschi, cofounders of the Copenhagen Institute of Interaction Design

"In a world with so much written about team processes for greater development speed and effectiveness, Turning People into Teams provides immediately usable tools for any kind of team to work better together. For anyone leading a multidisciplinary team, this book provides simple frameworks for getting at the hard challenges of team dynamics and a common format for engaging your team that can be experimented with and freely adapted to work within any context.

"Many changemakers and writers focus on the initial stages of ensuring a team is aligned to a shared goal. While this is critical, in my work helping organizations transform to be more innovative, I find the true test of change to be how it plays out over time. The Sherwins provide not only effective methods for framing the problem to be solved but also tools for completing a team's efforts and learning from what has been done. Written in a tone that invites readers to craft their own solutions, this book offers a way of approaching teamwork that you and your team can own and adapt to your needs."

—Turi McKinley, Executive Director, Org Activation, frog

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For Maryrose,
who brought this team together

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CONTENTS

PREFACE

Checked out. That's how you could describe your new team. Here you are, in another meeting with the right people, at the right place, at the right time, and yet…when you look around the room, it's a sea of blank, disengaged stares. *This isn't a team,* you think. *But maybe, this time, it will be different*.

Teams take the ingredients available to them and transform them into exceptional outcomes. They craft software applications, from early ideas to compiled software. They create plans for social services and urban centers and Michelin-starred meals and bring them to life. These teams bring the best effort of each individual into their collective work. They debate and align on critical decisions, pursuing a common purpose. They solve problems for the benefit of others and take ownership of what they produce. Most important, they thrive under a shared vision of success.

When we put it that way, don't you want to be on a team, all of the time? Sure you do! Except that teams are made up of people. And people are messy and complicated, even when they're trying to be logical about making decisions and solving problems. They—we, you, all of us—confound each other, even on the best of days.

This is the central contradiction of work: team ideals versus people reality. We're thrown into a room with a bunch of strangers and asked to do the seemingly impossible. And to manage the impossible, we need a way to get things done with some semblance of order. We never have enough time to do any of this, and sometimes we make distressing compromises to deliver. All to sell and ship and innovate and save lives and change the world.

Today's teams strive to serve their customers with the highest-quality products, services, and experiences they can create. And while their attention is focused on creating great project outcomes, we've seen that the quality of teams' experiences—how they work together—often falls by the wayside. Even worse, organizations are putting less care into sustaining and retaining teams over time. The dominant, unspoken assumption is that people will be at their jobs for only a few years, so there's little motivation to create the right conditions for teams to flourish. Many organizations struggle to define how their employees will be successful at teamwork over the long-term.

Which brings us to you.

No one picks up a book on teams or management, or really anything in the business section, because things are going well. You know things could be better. *Everything's pretty top-notch, thanks* is probably not what you were thinking when you opened this book. *Turning People into Teams* is about how teams can choose to work better together. We've found that short, focused rituals can greatly improve day-to-day working environments, and this book shows you how to do these rituals with your team.

Before we get started, perhaps you have some questions, such as:

What do you mean by "choose"?

By "choose" we don't mean that you get to pick the people you work with. And even if you could, it wouldn't mean that the people you work with would magically walk out after a project kickoff meeting and announce: "Ta-dah! Now we're a team." A team is a choice. Every day, every meeting, every deadline, individuals make the choice to be a team. We don't just make the choice once during a presentation or an offsite. We choose and choose, and then we choose again, at each point during the life of a project.

You keep saying "you." Who do you think we are? Who is this book for?

You are on a project team. Your nonprofit is launching a new service. You're with a software company. You're a designer, a programmer, a developer, an engineer, a content strategist, and you also do interaction design, UX/UI, packaging, and finance. You aren't C-suite, but you might be some day. It's your first week. You've just been made the team lead. You're the project manager, the product manager, and the program manager. You're on your first team. You've been here for years.

All of you want the same thing: to have a better overall team experience that helps everyone get things done. This book is for you.

Who are you?

We're a lot like you. We've been with design teams, collaborating with other disciplines in making products and services. We've each had our own careers, and now we have our own business. The two of us have traveled all over the world and talked with thousands of people about how their teams work. We've lost count of how many teams we've trained. Most of these teams work in what's called innovation or R&D or product development or nonprofit program design. No matter the labels, these teams are thrown big messy problems that need to be solved with an experimental approach. They are multidisciplinary, with people from diverse cultural backgrounds and unique training, skills, and important letters after their names. They are focused on crafting a great customer experience (CX) or user experience (UX) or service experience (SX) or a plethora of other acronyms.

Why did you write this book?

Throughout all of our time working with teams, several patterns emerged. Teams wanted more alignment, better decision-making, and of course, a sense of agency and ownership. This book is a collection of the best rituals we've given to teams to help with those things. The book reflects our ultimate goal: to build teams that capture the strengths of each individual.

Why did you really write this book?

Honestly? Because we believe that teams should have the power to shape the processes and systems that affect their day-to-day work. Teams are tired of waiting for the entire company to change in order for them to improve their jobs. Teams should not have to wait for a special initiative, for budget approval, or for a distant executive to issue mandates. Teams should be able to start making things right—today, not tomorrow.

My company does FILL IN THE BLANK methodology. We also use the FILL IN THE BLANK framework. And everyone is supposed to follow FILL IN THE BLANK rules. Can my team still use this book?

Yes. This book isn't meant to subvert the authority of the company. Instead, every ritual is meant to enhance and support the teams that allow the company to function. Although many of our experiences have come from working on innovation teams, what we're sharing here doesn't require working in any particular process or methodology. The rituals are about aligning teams, not breaking things apart. The team gets to choose what to adapt and how. You may even find that certain rituals square nicely with practices that your team already has.

How is this book organized?

This book is structured by project timeline, in three parts. Part 1, "Better Beginnings," is useful for projects that are just starting. If you're at the beginning, that's great! If not, that's fine, too. You might go directly to Part 2, "We're Stuck, Now What?" It's a popular starting point. The rituals in Part 3, "Sprinting to the Finish," are intended to help wrap up a project. When your team finishes a project and begins the next one, then jump back to the beginning.

Is it okay to skip around?

Of course! People don't read business books like normal books. They mostly skip to the parts that are relevant, read those, and ignore the rest. That's perfectly fine.

You might be searching for something specific for your team. We want to state clearly that there are a few things you will *not* find in our book: "inspirational" but essentially useless stories masquerading as case studies; jargon or weird acronyms; arguments about methodology or dogma; quotes from or about Steve Jobs.

At the end of the book, we'll provide information about the Turning People into Teams digital toolkit we built. It contains digital versions of the diagrams for the rituals described throughout this book, along with instructions.

Before you hop to the section that's most relevant for you, however, let us explain a little more about the rituals you'll find here and how they've been designed to help you and the people on your team make better choices together. Stay with us until the end of the introduction, "Shared Rituals and Routines Turn People into Teams."

Anything else?

Investigate. Explore. Experiment. Make choices as a team. Together. After all, like we said, this book is for you.

INTRODUCTION

Shared Rituals and Routines Turn People into Teams

Great teams aren't built person by person. They're built behavior by behavior.

Leaders know that improved teamwork—and the behaviors that surround it—is a critical factor in employee engagement, retention, inclusion, and empowerment. They've read the results from Google's Project Aristotle, which encourages the modeling of behaviors with workplace teams to create increased psychological safety, dependability, structure, and clarity. IBM Smarter Workforce Institute puts it another way: Leaders should be offering their employees opportunities to participate in decision-making and trust them with the autonomy to find the best paths to achieving success.

But when we talk directly with leaders and their teams, no one asks us about any of that. Everyone knows the benefits of things like clarity, dependability, teamwork, and collaboration. It's the specifics that aren't clear, leading teams to ask us: *How* do we get those things?

Our answer is always the same. Create a culture where coworkers are designing and building the team experience they want. Create shared rituals.

Why rituals? Rituals cultivate behaviors that help team leaders and members be successful *and* create positive working experiences for their talent. Just as teams change and grow, so do the rituals that bind them together. Cueing the appropriate ritual with a struggling team can transform their work. Teams regularly evaluate whether their rituals are helping them achieve shared goals, and if they aren't, they redesign the rituals. Over time, the behaviors modeled in the rituals become part of their routines.

Rituals and routines are integral to how work gets done on high-performance teams. And we're not talking about fluffy team-building activities. Instead, we're talking about rituals that ask for input from each individual and shape it into a shared point of view. We're talking about routines that support inclusion, grow accountability, and foster a deeper sense of ownership. We're talking about every team having the ability to transform their day-to-day experience of working together.

What Are Workplace Rituals?

Rituals are group activities during which people go through a series of behaviors in a specific order. Some of these behaviors are established, while others may be new. Teams create rituals for two reasons: to support the behaviors they want to see from each other, and to respond to the needs of their organization.

Rituals can be expressions of an organization, and they can signal the values of their unique culture. Some rituals are small and specific, such as the sounding of a gong before a meeting or a monthly lunch-and-learn. Other rituals are part of larger, more complex systems, ranging from a week-long onboarding process for new team members to the one-on-one meetings that prepare employees for their yearly performance reviews.

Every ritual reinforces behaviors that happen as part of the

What Rituals Have Been Effective for Your Teams?

Write a list of the different rituals your previous teams have had, then answer these questions:

1. Which of these rituals supported the teams in accomplishing their goals? Why? What qualities did you appreciate?
2. Which of these rituals slowed down progress or were counterproductive? Why? What do you wish you could have replaced them with?
3. Did the teams discuss the intention behind their rituals? If so, how did that translate into team success? If not, why not?

Ask a teammate to answer the same questions and compare your responses. Which rituals work well and support your teams' goals? Which rituals might need to be changed?

workplace, whether team members recognize it or not. Some rituals may have been created or enforced by other teams. They may be part of work processes that feel dogmatic or beyond dispute. The reasons why these rituals are necessary and must be preserved aren't always clear to new team members, and sometimes not even to those who have been around for years. Some "that's just how we do it here" rituals benefit certain job functions—or even some team members—more than others. If this sounds familiar, try the activity in the sidebar to investigate these rituals.

What Are Routines?

Routines are a series of rituals. They govern the overall flow of how collaborative work gets done on a team, just as much as how teams respond to unique or challenging situations. In this book, after each ritual is described, we will list other situations in which you can repeat the same ritual to make it part of your team's routine.

Your team can't make a ritual into a routine until they've tried it. See how the team responds to participating in the ritual, and make sure that it provides value based on where you are at in your project. Then consider whether the ritual should be repeated to provide further benefit.

You'll know a ritual has become routine when the behaviors modeled in the ritual become part of other workplace interactions. For example, we worked with an organization that wouldn't let anyone propose a change to their company's products unless they could answer the question: "What problem are we trying to solve?" This question led to a ritual (similar to one detailed later in this book) where the team discussed what they thought the problem was and then decided what to do about it. Their leadership told us this ritual had become routine in how their organization functioned. Team members made sure to answer the question whenever they presented their ideas, and new hires were asked to observe and participate in the ritual from day one.

That said, don't burden every ritual with the expectation that it's going to radically transform your workplace culture. What's more important is that a ritual helps your team with day-to-day challenges. Daily improvement is how real change happens.

How to Use the Rituals in This Book (or Design Your Own)

The rituals that follow will help your team come to a collective point of view and make choices together in situations that matter. Depending on the size of your team, the rituals detailed here can take about an hour, so set expectations with your teammates about what will be required of them. The more practiced your team becomes, the less time the activities will take. For each ritual we suggest using a whiteboard, markers, and sticky notes. We've seen the best results with teams that use as little technology as possible during a ritual.

As your team becomes more proficient with their rituals, you might want to adapt some things to suit your team's needs. We encourage that! Come up with your own names for the rituals. Brand them appropriately. Make the language in the diagrams that accompany most of the rituals more appropriate for your organization. However, if you adapt a ritual or create your own to go along with those in this book, we strongly recommend including the following elements.

Start each ritual with a question

Each ritual starts with a question. We've seen teams struggle with these questions at key points throughout a project, which can lead to misalignment if they go unanswered. A team that wants to explain the purpose of their project may ask, "What problem are we trying to solve?" This question would lead the team to begin the corresponding ritual.

Visualize the ritual's output

In each of these rituals, everyone's input is captured and shared visually, in a flow that moves from individual perspectives to group decisions. The visual outputs are simple enough to be drawn on a whiteboard or a sheet of paper. Have extra paper and sticky notes on hand for team members to use during the rituals, so they can easily reorganize and cluster what they've created to find connections.

Side note: If you work on a remote team, you already know that

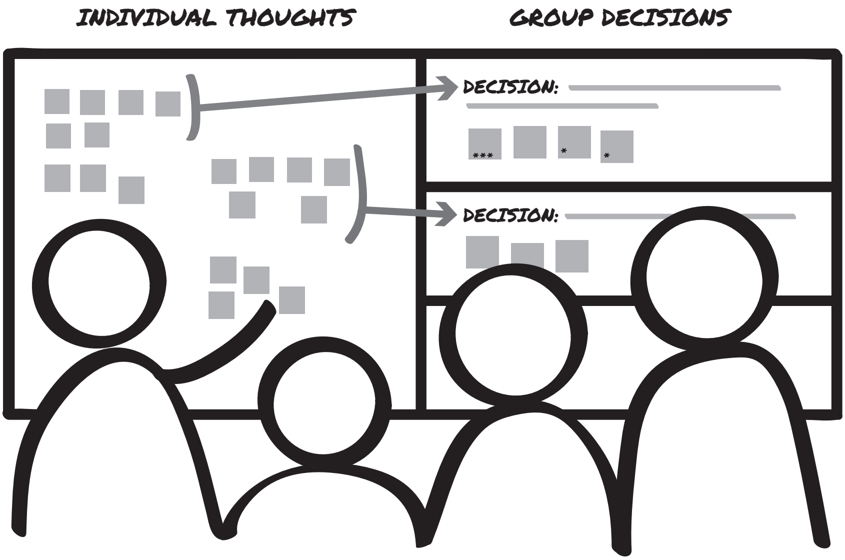

FIGURE 1 Use diagrams when facilitating each ritual. Using diagrams helps team members understand each other's individual thoughts and see how they contribute to group decision-making. It helps to have each individual thought on its own movable element, such as a sticky note, so the team can work together to arrange and group those elements.

your team will need to be more disciplined about how things get done. Rituals can be difficult when you aren't in the same room, but we've seen remote teams be very successful with the rituals in this book. You'll need a reliable way to collaborate on a document together, as well as a way to record and distribute results. A lot of teams keep a shared, central document with the output of rituals conducted on a project, so anyone can access them at any time.

Throughout the book we've streamlined the visual outputs of rituals to make them easier to learn and to use. The last thing a busy team needs is fourteen different charts for fourteen different activities.

Give Equal Time (A Hard Thing)

Ask team members to withhold feedback or discussion until everyone has had a chance to share. This helps everyone feel like their opinions have been heard and acknowledged, regardless of the amount of time they've been with the team or their proficiency at verbal communication. This is one of the harder things we'll ask you to do in this book.

Equal time means that, when talking, each person gets the same amount of time. Introducing this behavior can be challenging. Try using a timer. It feels artificial at first, but there's no other way to equitably distribute time to your coworkers. To set expectations, say something like, "I'll pick one of you to start, and then each of you will share your answers with the team. Each person has four minutes, and it's important that we have a chance to share without interruption. Once you're done with all of your answers, everyone else on the team can ask a few questions. Then we'll move on to the next person until we're done."

Inevitably, someone will use their time to start commenting on other people's answers. Redirect that behavior by saying, "We appreciate your input. Let's discuss it after everyone's had a chance to share."

We fully endorse the practice of equal time, particularly given what we've learned from working with diverse international teams, where it isn't possible to fully accommodate every person's speaking style and contribution patterns. Equal time asks everyone to compromise in order to foster productive discussion.

Give each team member a chance to lead

To keep everyone on time and on task, you'll need someone to facilitate the ritual. Teams are most successful when members take turns leading each ritual. If there's a particular item that the facilitator should be focusing on, it's noted in the instructions. What we've provided here is intended to make it easier for people at all levels to be able to contribute. Nothing is hidden about how or why the rituals work. As your team becomes more comfortable using and adapting rituals, we suggest maintaining this transparency to encourage contributions from everyone.

Create and share individual work before discussion

Each ritual requires team members to think on their own, silently, before sharing their input with the group. This reduces common decision-making biases such as anchoring, where the first piece of information that you hear influences your point of view. This moment of individual reflection is a keystone habit that should be part of any team interaction.

After individual work, each person shares their input and places it appropriately in the diagram, whether that's on a large sheet of paper, on a whiteboard, or in a shared document.

Discuss and decide after understanding everyone's perspectives

After everyone has shared their perspective, the rest of the ritual is focused on group discussion and decision-making. The facilitator of the ritual identifies where there's consensus and where there's the need for open questions and debate. This way, trade-offs are apparent to everyone before they make any choices. If you're concerned about individuals dominating this part of the process—and let's be honest, you probably are—ask each person to silently mark with a star their initial preferred options on the whiteboard or in your shared document, *before* the team discussion begins.

Revisit the silent votes after the discussion. This discussion before and after can help people identify what factors influenced their decision-making process as the activity progressed. Make sure you're documenting the discussion, so that everyone on the team can see and react to your shared thinking. If the ritual requires it, we'll show a reference example of the visual output you're trying to create.

Create action steps

By the end of each ritual, the team should have reached agreement on what their next actions are, who is taking them on, and when these actions will need to be completed by. Be aware that after each ritual not every team member will get their way (and, being honest again, we know that many people conflate being heard with getting what they want). What's more important is that every person participating was able to contribute their perspective and recognize the trade-offs that led to making one decision over another. If this doesn't happen, then over time how can we ask anyone to stand by their team?

Ready to Go?

We've given you the DNA for the rituals in this book, so you can explore, revise, and adapt them with ease. Every component—from visualizing the output to giving equal time—is essential to a ritual that fosters cooperation and collaboration. If you forget any of them, we've placed reminders throughout the book. These components help teams hold each other accountable with their behaviors. Change takes time, and the people on your team should be able to support each other at each step in their journey.

Remember how we asked you to stick with us until the end of the introduction before skipping ahead? You made it! Now feel free to skip to the part of the book that will benefit your team the most. We're ready for you.

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PART 1

BETTER BEGINNINGS

It's a beautiful Monday morning. Red and yellow leaves dance on the trees, and there's barely a cloud in the sky. People are jogging on the trails through a small park, their bodies haloed by the sun—at least, that's what you can see from the office window. You're stuck in a freezing conference room with a bunch of coworkers you don't know, listening to leaders you've never met explain exactly how important this upcoming project is for your company.

What do your team members think about this project? You leaf your way through the three-day kickoff agenda. It looks like you won't find out until late Wednesday. Your gaze wanders back to the window. You can almost feel the sun on your face, the cool breeze on your skin. Oh well. Maybe the boxed lunches will have those cookies you like.

New teams don't need to start this way. Except for the cookies, perhaps.

In the first weeks of working with a new team, you have to figure out why you're needed and what your personal contribution will be. You have to agree on which problems you're trying to solve together. You need to have a plan for how everyone will work together—from everyday communication to handling the things that could potentially go wrong (or right). And it would be nice to know a little more about the people you're working with and how you can best support each other.

When starting a project, we explicitly look for these things. Yet on so many teams, this information is absent. It can take weeks for team members to be fully invested in a project, and many more weeks to iron out issues that could have been handled from the start.

This is a shame, because patterns of team behavior are established at the beginning of any collaborative effort. The longer these behaviors persist, the harder it is to change them as a project moves along. While kickoff meetings are important for talking about team cohesion, they're also one of first opportunities to establish and model important behaviors for the team. This is even more critical when working with teams that bring people together from across different functions and cultures.

In the first part of this book, we'll share a series of rituals that help people set better expectations for how they want to work together, and make choices that bring them into alignment as a team. These rituals are best used in the first two weeks of starting a project, but they can also be used if a team starts to veer off course. We'll close this part with rituals for planning a project kickoff with your teammates, so you can make the best use of everyone's time and expertise.

You'll find a lot of ideas here that your team can try. However, it's unlikely that any new project could accommodate all of these rituals before you dive into the work. Choose the ones that you think will best help your team and get going!

Start the Team by Talking about the Team

Unknown quantities. That's what we are to each other when we're starting on a team. We're sitting around the proverbial table, drinking our favorite coffee or tea, but none of these hot beverages will wash away our jitters. *Who are these people? How do I want to work with them? And how are they going to best work with me?* If these questions aren't answered right away, we start to make assumptions about what's best for ourselves and others—and those assumptions are usually wrong.

We encourage every team to conduct one of the following rituals before they kick off a project. By using these rituals in advance of formally starting projects, team members can get to know each other better as people, find shared points of connection, and begin to develop norms for how they want to work together before they feel the pressures of their work.

Because these rituals happen at the outset, this is the opportunity to clearly communicate to your future teammates the reasons why you're taking the time to conduct them. Likewise, after performing these rituals, be sure to conduct any necessary follow-up conversations before you prepare for the project kickoff.

RITUAL What Do We Bring to the Team?

Norms are common understandings about what is or isn't acceptable for a team in terms of behavior. Shared team norms include things like when employees show up to work or how team members want to communicate. Norms are part of our everyday interactions with coworkers, and they help shape the patterns of how work gets done.

At the start of a team project, many norms and their corresponding ways of working are unspoken. They aren't discovered until the team begins working together. It's important to formalize these unspoken norms as quickly as possible, and to let people choose which ones they want for the team. You can't always control the cultural norms and values that shape your workplace, but you can control what your team agrees to regarding how they want to work together.

This ritual is designed to help the team foster a shared picture of their skills, interests, and hobbies. It will also help them identify the areas in which they want to support each other over the course of the project. But the most important part of this ritual is when the team has their first discussion about their working norms.

This ritual is our adaptation of frog's "Skill Share" activity from the *Collective Action Toolkit* (of which we were both contributors) and frog's "Team Leap" (created by Tanya Khakbaz). We recommend using this ritual with teams that will be working together for up to three months. If you're working together for longer, the next ritual ("What Do We Value As a Team?") may be better suited to your team's needs.

1. Answer questions provided to the team

Ask your team members to answer the following questions on their own. They can either answer them at the start of the ritual, or these

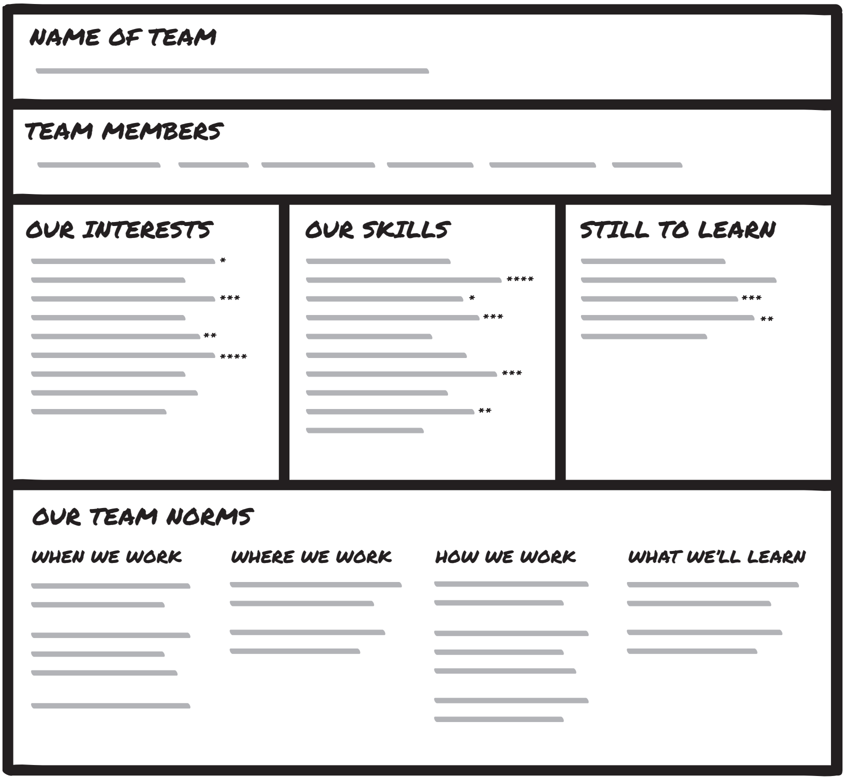


FIGURE 2 "What Do We Bring to the Team?" example output

questions can be shared in advance of the meeting so people have time to prepare their responses.

What's your name and your role?

Tell us what you want to be called by the team, as well as your job title and role if we haven't worked together before.

What are your personal interests or hobbies?

Share what you feel comfortable letting the team know. Some teams work within organizations that discourage talk about personal lives.

We've seen teams use this question to either create new behaviors around those conversations or to continue the practice by simply describing what people are interested in around the company's products or initiatives. Your team can decide how they want this to go.

What skills do you bring to the team?

Describe what skills you use as part of your job, plus those you want to share that aren't always used at work. This is where personal life skills may rise to the surface. In order to be effective in our professional lives, many of us draw from expertise that was not obtained "on the job." We rarely get the opportunity to express this knowledge. Now is your chance.

When do you prefer to work on your own?

Some work that happens on projects has to be done individually at first, then completed as a team. Which work tasks or situations do you prefer to tackle solo?

When do you prefer to work in collaboration with others on a team?

Be honest here. A simple story or two about situations you've been in on previous teams can be a good way to answer this question.

What do you want to learn while working on this team?

We have to get things done, but we've also got a great opportunity to learn from each other. This could be a personal or professional goal or just something you've been curious about.

If you want to add additional questions to this list, include some that relate your teammates' personal experiences to the subject matter of the project. For example, if the focus of your project is helping people manage their personal finances, you could include questions like "What was the best advice you received from a friend about money?"

2. Share answers with the team

Set up this ritual's diagram in a location that all of your team members can see. Ask each person to read out loud what they've written. As they share about themselves, write their interests and hobbies in the first column, their skills in the second column, and what they want to learn in the third column. Don't label the information with the names of team members. If you have multiple coworkers with the same skill or interest, mark a star next to that information.

After everyone has spoken, describe to the team what you've discovered about everyone's skills and interests, noting both the unique skills and interests that individual people have, as well as any overlapping skills or interests. You might also identify skills the team *doesn't* have that are required for the project, which you can use as an input for project planning.

3. Create preferences for how you want to work together

Now that everyone has a sense of each other's skills and interests, ask each team member to list the norms they want to see for the team. For a workplace team, these norms fall into the following categories:

- When you want to work
- Where you want to work
- How you want to work
- What we'll learn from the work

Every team member should write a response for each of these norms on an individual sticky note. People can use their answers

Questions That Help Teams Determine Their Norms

When doing this ritual, people usually ask for examples of typical norms. The following questions can help your team:

When you want to work

- How long do you want to work each day? What days?
- When do you want to take breaks or lunch?
- When are the best times for the team to be working together?
- How do you want to signal your availability to teammates when you're working? Or when you need to step away?

Where you want to work

- Where do you prefer to work? In the office, remote, or both?
- What type of work environment is required for the team?

How you want to work

- How much time alone do you require as part of your daily work? How much time do you need for collaboration with others? How do you best communicate that to others?
- How do you want to communicate challenges or issues?
- How do you want to celebrate team successes?
- How do you want to address team mistakes or failures, and make plans to recover from them?

What we'll learn from the work

- What skills and knowledge do you want to gain during this project?
- What personal goals do you want to achieve during the project?

from the first set of questions as a starting point for this activity, especially if they spent a lot of time talking about when they prefer to work collaboratively or on their own. It's important to remind everyone that these are *wants*. They represent best-case work scenarios rather than "what I'm supposed to say to look like I'm dedicated" or "what I'll put up with." The viability of individual wants varies from culture to culture, but if you don't ask for what you want, you'll never be able to negotiate for it with your teams.

4. Share your individual preferences

Ask each person to share the individual norms that they've created. When each person is done, place their suggestions on the diagram in the appropriate category.

5. Decide on your team's working norms

Now that everyone on your team has a shared understanding of each other's work preferences, you'll translate those preferences into shared norms for the team. Read through each category of work preferences. You're looking to make decisions as a team on what individual preferences should be translated into shared norms for the team. Identify where there are shared work preferences and where there are conflicting work preferences that may require trade-offs.

Our rule of thumb is this: Limit your team to six to eight norms and be specific in how you describe them. The more specific your norms, the easier it is to give each other feedback and hold each other accountable (refer to the sidebar for examples).

To complete this ritual, summarize for the team what decisions you've made. It can help to keep the summary in a similar visual format to the output of this ritual, so everyone on the team has a clear picture of what was discussed and the shared norms they've agreed to uphold.

Make Your Norms as Specific as Possible

Here are a few examples showing the difference between individual working norms and the ideal level of specificity for your team's working norms. We keep what we're writing visible to everyone on the team, moving from "I" statements on the left to "team" statements on the right. This way, each person sees how their personal preferences have led to collective decisions on behalf of the team.

When I want to work	When the team wants to work
Peter: I will be in the office from 8 a.m. to 5 p.m. and take lunch around 11 a.m. to noon. I don't respond to email after work.	Individual team members are working on their own schedules from 7 a.m. to 7 p.m.
Jo: I get up early and like to work for an hour or two before coming into the office. I get the most work done then.	Collaborative work is from 10 a.m. to 11 a.m. and from 1 p.m. to 5 p.m., and it should be blocked out on our work calendars.
Frederick: My evenings are for family. If I do respond to emails after work, it has to be later, after my kids go to bed.	Lunch is from 11 a.m. to 1 p.m., so we'll avoid scheduling meetings during those times unless there's really good food.
Leslie: I like to work from 10 a.m. to 7 p.m. I'm most productive at the end of the day.	We will respond to emails sent between 7 p.m. to 7 a.m. only during standard business hours.

Routine Do This Ritual Once, Use the Information Again

Reuse what each team member provided in terms of individual work preferences for when new people join your team or at future team kickoffs. Make sure that each person reviews their answers and updates them. Life circumstances and professional growth can change a coworker's preferences and priorities.

Routine Revisit Your Norms after You Start the Project

It will take a week or two for you to know if your team is capable of holding themselves to the shared norms they've established. Use the ritual "What Should We Change?" in Part 3, "Sprinting to the Finish," to revisit your norms and revise them based on what the team has discovered.

RITUAL What Do We Value as a Team?

If you want to reduce team misalignment from the start, close the gap between what people say they value and how they demonstrate those values through their everyday actions.

Words are powerful—so powerful that most of the problems we encounter are failures of vocabulary. We assume that everyone uses the same words and that they mean the same things to everyone.

For example, think about the word *supportive*. How do you see that word in how your team works together? How do your coworkers see it? Have you ever sat down with your team and talked about that? People see their values in behaviors, in what people *do*. But when people come together in teams, they typically revert to abstract or fluffy words to describe how they want to work and leave the specifics for later.

It usually isn't hard for team members to agree on what values are important to them: *creative, innovative, collaborative*. Within an hour or two of dialogue, most teams can find common ground and create basic working definitions to explain which values matter to them and why.

But from there, it can be hard for team members to be specific about what tangible behaviors they'll demonstrate as they put those values into action. Many teams say they value *transparency* or promise to be *ethical* or *respectful,* but when things go poorly,

But Shouldn't We Be Using Our Corporate Values for Our Team?

Most organizations have value statements they use to describe how they work. While these statements are important to the organization as a whole, they usually don't describe the specific behaviors that each teammate wants to see on their team. When doing this activity, post your corporate values for everyone to see and identify how the team's behaviors fit within or expand your understanding of them.

they use those words as weapons. They don't allow team members to address underlying behaviors. It's difficult to help each other improve as professionals when tough conversations start with "This team isn't creative enough" or "You don't respect me."

This ritual can help your team align and define behaviors that are unique to them. These behaviors will become your working norms as a team. We recommend using this activity with teams that will be working together for longer periods of time, from three months to several years. We also recommend periodically revisiting this ritual. Values change slowly, but the ways that we express them can shift quickly.

To prepare for this activity, have a stack of index cards or sticky notes, as well as a whiteboard or a large sheet of paper on hand. Although this ritual works best with physical notes or paper, a remote team can use a shared document to achieve the same results.

1. Identify your team's working values

Hand out sticky notes or index cards to your team members. Have them individually write down three words that describe how they like to work with others on a team. Some of the words that we see come up most frequently are:

adaptable	approachable	creative	collaborative
curious	disciplined	driven	engaged
ethical	friendly	fun	helpful
innovative	passionate	professional	reliable
respectful	supportive	transparent	visionary

If team members ask for formal definitions of the words, let them know that this activity is about how these words are defined by them individually, not by others on the team. How we personally define these terms, which is based on our own personal and professional histories, has a direct connection to how we recognize and embody these values.

2. Share your value words

Ask each person on your team to share their value words and explain why they chose them.

3. Decide on three values for your entire team

As a team, each person votes for three words that represent their most important values. The entire team has to agree on those three words. If you're facilitating this conversation, pay attention to the trade-offs the team makes as they narrow in on their chosen words. We don't always agree on what these terms mean. Talk about that!

4. Describe what behaviors you want from your teammates

Ask each person to take at least ten minutes to write down specific behaviors they would want to see from each other, if they were putting those three values into practice. Use the following questions as prompts:

If we say that we're VALUE WORD, what behaviors are we doing to show that?

This question helps people reflect on all of the different behaviors they currently have with their teams. It also helps them identify which of the more positive behaviors they want to continue using with their team.

If we want to be more VALUE WORD, what behaviors can we bring into our work?

These are new behaviors people want to introduce to the team. Since they aren't currently being displayed by team members, these behaviors may take more time and effort to put into practice.

Behaviors should be tangible actions that the team can reference as far as how the team communicates, collaborates, and gets their work done. Each behavior must be associated with a value word. Like the shared norm example in the previous ritual, behaviors should be specific enough that team members can say definitively whether they did or didn't do them.

For example, "I want us to give each other feedback on our work regularly" isn't specific enough, because *regularly* for one person might be every two days, while another team member thinks that once a month is fine. Instead, try: "We will meet every Thursday for an hour to share work in progress, and each team member will receive five minutes to provide focused feedback on how their work could be improved."

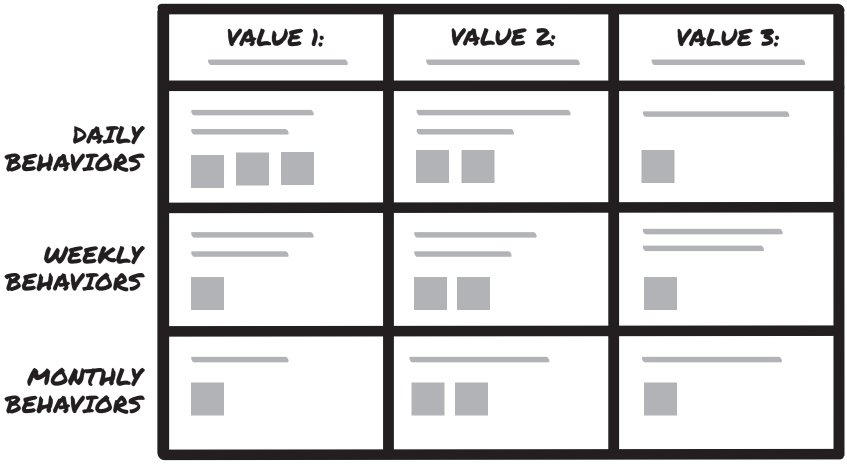


FIGURE 3 “What Do We Value as a Team?” example output

At first, this specificity may feel overly prescriptive or limiting. Stick with it. Think of these behaviors like building codes in construction. A building can have a thousand different features and functions, but the structure underneath needs clear and defined parameters to ensure that its systems work together and that its occupants are safe.

5. Decide what behaviors the team will take on

Set up this ritual’s diagram in a location that all of your team members can see. One at a time, each person shares the behaviors they’ve identified. Place them under the appropriate value word in the diagram. Then, as a group, prioritize which behaviors everyone wants to carry forward that could have the most impact based on them happening every day, every week, or every month. Teams can only tolerate so much change over a few months, so be honest about this and take care to not overcommit. Most teams are better at continuing existing behaviors than creating new ones.

When you're done, make sure to place the output of the ritual where everyone can reference it throughout the project, especially if the team wants to make changes.

Routine Check in about Team Values and Behaviors

Your team should regularly discuss how they're putting their desired behaviors into practice as a team. One approach is to use the ritual "What Should We Change?" in Part 3. You can also give your teammates feedback in the moment to reward behavioral norms

Define Team Culture around Microcommunication

Emojis and memes and GIFs, oh my! Acronyms, symbols, and nonverbal communication through animated GIFs have become part of our everyday workplace dialogue. We use this lingo to communicate everything from the urgency of a stakeholder request to building the culture and character of a team, often with a dollop of sarcasm or wit. While we're adapting to this newer aspect of our dialogues, we still need to be aware of the cultural nuances of what we're trying to express. These communications, digital or otherwise, can still create insular team behaviors.

We encourage teams to create a microcommunication ritual, where they define the everyday workplace jargon and nonverbal cues that may come up. This can be a quick and fun activity. Ask each person to jot down a list of all the workplace acronyms or jargon that they've used in the past month, as well as their favorite emojis and animated GIFs. Have each team member share what's on their list, then create a cheat sheet that new people joining the team can review and contribute to. Update the list as needed.

that you've set up, or make suggestions if a behavior isn't being modeled in the way everyone had intended.

RITUAL What Habits Do We Want as a Team?

Habits are individual behaviors that a person repeats over time, triggered by situations experienced in the world. We form and maintain habits because they lead to predictable rewards and positive outcomes. It's important to remember, though, that those outcomes might not actually be beneficial in the long term. For many of us, it can be difficult to assess the long-term impact of our habits at work. We're often unaware of our habits, so they can be hard to change.

What you do during your first weeks of work with a new team establishes patterns of behavior for everyone, and those patterns inform the team's rituals. But our habits as individuals can create the most friction when we start working together. Individual habits are visible to everyone on a team, and they influence the behaviors of others. Habits can be tied to our values, but not always. Some habits have been honed by years of experience, while others may appear to be personality quirks. If we're not cautious, a habit can set implicit team norms for what behaviors are "acceptable," even though those behaviors aren't beneficial for the team over the long term.

In short, personal habits influence how the team acts during rituals. A single person's habit can ultimately influence an entire set of rituals and routines in a company. This could be a triumph or a catastrophe. Your team members may know better than you the habits that influence the team's work. This ritual will help you and your team identify the habits they want to take on or foster as a team. The ritual can be done after "What Do We Bring to the Team?" or as an alternative to "What Do We Value As a Team?" for short-term projects.

Self-Assessment: What Habits Have Helped Your Teams?

If you're seeking more insight about your own habits, try the following activity before participating in this ritual. Think about people you've worked with in the past, where there was a habit you felt was beneficial to the team. Consider these questions:

1. What was the specific personal habit, and how did you see it influence the team's work?
2. Did you take on that habit while you were working with the team? Why or why not?
3. Did the team discuss their intention behind the habit? Why or why not?

Answer these same questions one more time but focus on a habit that was considered counterproductive by the team. After you've done this, try this exercise with a coworker, where they give you feedback on one of your habits, and how it may have influenced their own behavior.

1. List individual habits

Set up this ritual's diagram in a location that all of your team members can see. Ask them to individually write down on sticky notes the habits they think help them be successful when working on teams. They can also write down behaviors or habits they see coworkers exhibiting that they want continued or habits they aren't seeing that they wish the team would try. These habits are the smaller, more personal ways that we act in the office. They are separate from the larger, team behaviors that inform the values in the previous ritual. But, just like those team behaviors, the more specific the habit, the better. Here are some examples:

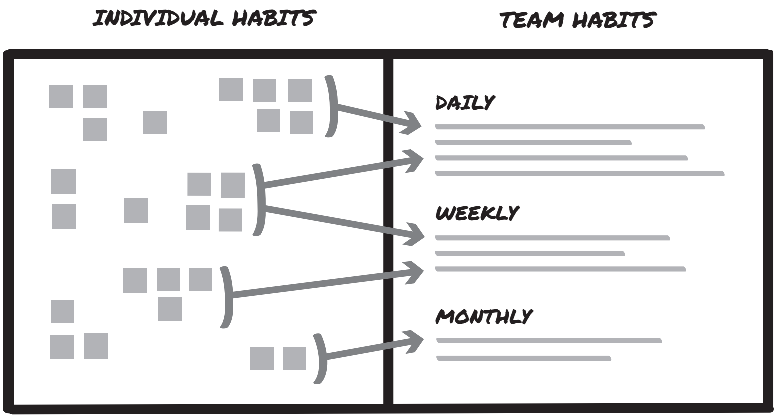


FIGURE 4 "What Habits Do We Want as a Team?" example output

- Write deliverable dates in the calendar in two colors, black ink for the hard deadline and an earlier date in green to make sure things are on schedule.
- Respond to email within twenty-four hours, even if just to say when we'll fully respond.
- Don't accept deadline changes from stakeholders until everyone on the team agrees.

2. Share your habits

Ask each person to share what they've written. Place this information in the left column of the diagram.

3. Decide what habits you want to establish

See if any habits or behaviors were suggested by multiple team members. Discuss them as a group and identify which ones the team would like to try. Place those in the right-hand column. Then, as a group, prioritize which of these could have the most impact based on them happening every day, every week, or every month.

To complete the ritual, go back over what the team listed in the second column. A good way to make sure the team's habits and behaviors are usable is to ask of each item: "We'll be successful in putting this habit into practice if…?" Capture the output from this ritual in a form that team members can refer to throughout the project.

Routine Hold Check-Ins on Team Habits

Plan check-ins to discuss how things are going with your team's habits. An adopted habit may become a significant enough behavior that it supports one of your team values; assess its efficacy by doing the "What Do We Value As a Team?" ritual. Focus on the habits and behaviors the team deemed successful and discuss why. Ask the team to consider a similar approach to other habits they've been struggling to put into place. If the team can't make all the changes they wanted to make right away, discuss different approaches that address those challenges. The ritual "What Should We Change?" can help with this process.

Prepare the Team for Next Steps

We don't always get the opportunity to discuss our values, behaviors, and habits with our teammates. This is a chance for everyone to get to know each other better. Although the conversations that emerge from these rituals may be therapeutic, they shouldn't be thought of as therapy. Use these rituals as a framework to keep your conversations productive and relevant to your team's needs.

If you start the team off right internally, it will be easier for them to focus on external concerns, such as the products and services they're creating and the audiences they're trying to serve. Let's look at a few rituals for defining those concerns.

What Problem Are We Trying to Solve?

Imagine you're back in that kickoff meeting, munching on one of those delicious cookies. Now, skip to the second day of the kickoff, where a senior executive stands in front of the team and shares the actual project goal. It's something along these lines:

> "We need a new website. We need better communication about our bread delivery service. Based on our competitive analysis, here's the content and the list of features that we have to include. We'll go live before the holiday rush."

> "We're here to select and implement a new billing system for our finance department. It needs to be ready by Q3, before we do the majority of our billings."

> "The CEO went to a wellness retreat, and now he wants us to develop a healthy eating program for all of the employees."

The implicit message that the team is receiving: This work is critical. We know what we're here to do. The goal's been figured out. Now let's show some hustle. But in these situations, we rarely ask the important question: *Why is this project really happening*? And the question behind that question is: *What problem are we trying to solve?*

Organizations don't initiate projects to meet goals. They do it to solve problems.

Look at the first project goal. Behind the scenes, your CEO had identified three critical business issues that could destroy the company if they aren't addressed next quarter. The website is a potential tool to address those needs—but is it the right solution? Is the team focused on those issues, and helping frame how a website helps solve them? They should be.

Consider the second project goal. The billing system for your company needs to be migrated ASAP, because the database it's sitting on is crashing constantly and riddling your customer invoices with errors. How is the project helping to solve that problem? Is the new billing system going to wholly address this? Or will you be having another meeting in a year to fix it again?

We call this organizational behavior *solutioning*. Everything is decided for a team. *Here's what to do, you figure out how.* It sounds like autonomy, but it's really just taking orders. And it's not clear if the solution is going to fix the underlying problem.

How you initially frame a project can make it or break it—not just for your team, but for everyone else you're trying to rally within your organization. Before you can talk about project goals with your team, you need to understand problems. Teams take more ownership over their work when they're able to define the problems they're trying to solve. You should have just as much as ownership of these problems as the solutions that your teams will create, test, and implement.

Through the following rituals, you'll learn how to create problem statements with your teams in advance of starting projects. You'll also be able to gather information about what you do and don't know that could impact your project.

RITUAL What Problem Are We Trying to Solve?

Problems are human constructs. Our understanding of a problem has to be constructed, word by word, and stated clearly for a team to be motivated to action. You can't assume at the start of the project that everyone understands the problem you're trying to solve. It will take each person's unique perspective and skills to piece together a complete view of the problem and pose a range of solutions to address it—even if you've done extensive research and legwork up to this point. Without everyone's perspective, the team is hampered. If you can't clearly describe a problem to other people with the right level of supporting information, why would they want to help you solve it?

This ritual shows you a whole-team approach to developing a problem statement. The activity is designed to incorporate everyone's contribution and properly frame *who you're serving* and *who is benefitting* from your team's work. It's important to note that business problems are not customer problems, and this type of problem statement helps a team keep these two things clearly in focus. Most teams are formed because of a business problem, and those problems are often served to the team tucked inside a pre-baked solution, like building a new website or creating an updated billing system. The following formula helps teams break down proposed solutions by determining what's driving the need for them and who actually benefits. From this vantage point the team can make better decisions about what they should be doing—and why.

Templates for problem statements have been put forth by many in the business community. Here's our version, with the first part inspired by Michael Schrage's *The Innovator's Hypothesis:*

Who are we serving?	Who is benefitting?
This **(group of people)** have this **(specific problem)** that's made worse in **(this situation)**. As a result, this **(desired outcome)** isn't happening.	In this project **(our team)** will create this **(project outcome)**, which will benefit **(groups of people)** by changing this **(metric of success)**.

Here's a breakdown of each of these elements:

Who are we serving?

- **Group of people.** The people we are serving with whatever we create in this project. The more clearly you define this group, the better. The group for one team may be an external consumer, while another team may be developing a solution for an internal customer that isn't intended for the public. Every team serves different audiences.
- **Specific problem.** An issue or problem that the defined group of people is struggling with.
- **This situation.** When and where the specific problem occurs.
- **Desired outcome.** What the group of people wants that they aren't receiving. This is where your team should focus. The team must discover exactly how this outcome will be achieved.

Who is benefitting?

- **Our team.** The people who are working on the project.
- **Project outcome.** What the team believes will make the project successful, from a results perspective.

- **Groups of people.** Specific groups of people will benefit from the project. They can be people within your organization, the customers or clients you are serving, or both.
- **Metric of success.** How the team will measure whether you've succeeded or not. Without something that you can measure, it's unlikely you can prove to your organization that your team accomplished what you set out to do.

Here's an example of a complete problem statement:

Who are we serving?	Who is benefitting?
Parents of children in rural areas who bring lunch to school can't find organic wheat bread at their local grocery stores. This is made worse when bread is used for both school lunches and dinner. As a result, the family believes they are eating less healthy.	In this project this team and the VP of marketing will increase product sales of our organic wheat bread products in rural communities, which will benefit our organization and grocery-delivery services by increasing our sales rate by 10%.

1. Individually consider who your team is serving

Set up this ritual's first diagram in a location that all of your team members can see. Ask your team to individually list the items they think should be part of the first half of your problem statement. Have them write their ideas on sticky notes for each column, so they are easy to place in the diagram and move around.

2. Share your thinking

Ask each person to share what they generated for each column. Post the notes in the appropriate columns of the diagram. Each team member may have several items for each column.

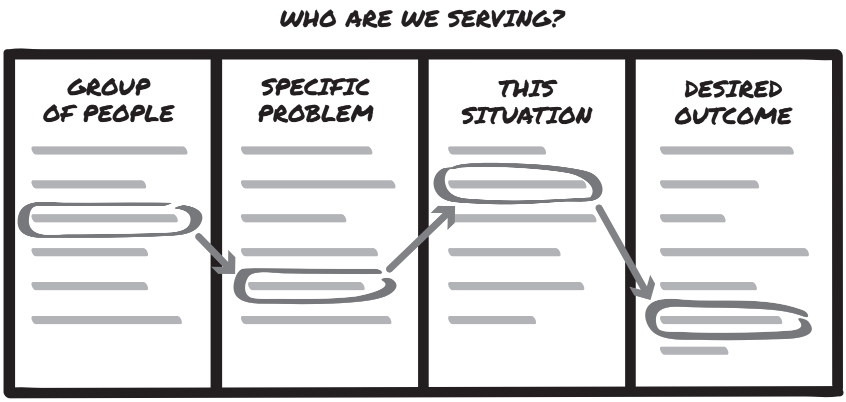


FIGURE 5 "What Problem Are We Trying to Solve?" example output for the first half of the problem statement

3. Decide what to include in the problem statement

As a team, review the information and debate what should be incorporated into the first half of the problem statement. Begin with the first column, so the team is starting by deciding on the specific group of people to serve. As you move from the first column to the last, use everyone's input to develop a first draft of the statement. When the team has decided on what items to include in the statement, write it out so everyone can see it before they continue.

4. Repeat the process for the second half of the problem statement

When your team is done with the above, set up the second diagram for this ritual. As you did with the first half of the activity, ask each person to work individually on who will benefit from your project. Then share, post your notes, and build the statement.

Word choice has a significant impact on how your team will consider the project focus, so read each half of your problem statement several times to make sure it's logical, accurate, and appropriate.

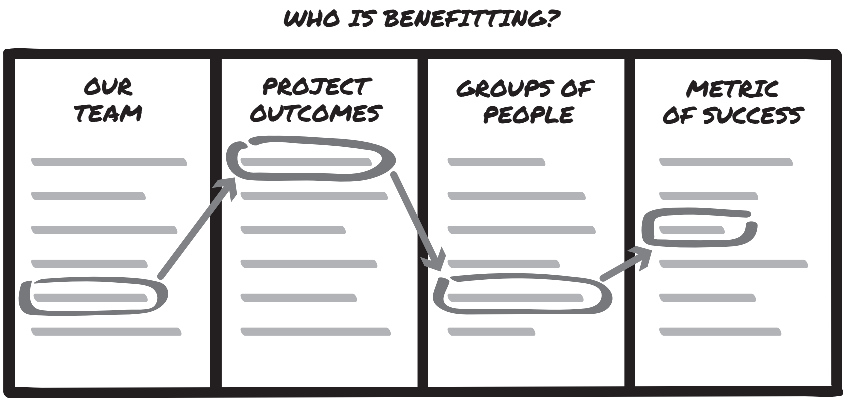


FIGURE 6 "What Problem Are We Trying to Solve?" example output for the second half of the problem statement

Don't be surprised if you need to make adjustments to the first half of the problem statement after working on the second half.

Routine Revise Your Problem Statement

How you've framed the problem and what the team will need to accomplish is only a starting hypothesis. As we discuss in the following chapters, progressing through any project will change your understanding of the problems you're trying to solve. You may learn new information that disproves specific elements of the original problem statement. When this information comes to light, share it with the team and find a few minutes for everyone to study the problem statement again. As a team, decide what to change and discuss how it will influence the project.

Routine Use Problem Statements When Testing Solutions

Whenever your team generates ideas or tests them in your projects, refer back to the problem statement and use the information that it contains in your experiments.

RITUAL What Do We Know? What Do We Need to Learn?

Some problems are easy to explain and fix. If you're on a team at a computer repair shop, for instance, the problems you're solving for customers are clearly defined. You have procedures you can follow to diagnose and repair pretty much anything that comes your way.

But most teams aren't dealing with these clear-cut kinds of problems. The problems they're tackling are often complex and poorly understood. It's possible that your team doesn't know enough at the start of their project to clearly describe what they think, let alone create a well-defined problem statement to guide their efforts.

You may be on a team doing innovation or invention work, where the entire project is about identifying problems to be solved. On these teams there's no obvious picture about customer needs or the relevance of a particular technology.

If either of these situations applies to you and your team, try this ritual first. It helps teams ask better questions at the start of the project, form better assumptions to drive their decision-making during the project, and model behavior that they want to see from each other throughout the project. We also use this ritual any time we're making revisions to our initial problem statement. For innovation teams in particular, the questions that emerge from this ritual become the driving force for the start of your project.

This activity is adapted from a process shared in "Presentation Presentation" by Mike Kruzeniski at the HOW Interactive Design Conference in San Francisco, CA, in 2014.

1. Describe what you know and what you need to learn

Write the following two questions in an area that everyone on your team can see. Then ask your team members to individually generate answers. If the project is complex, ask the team to prepare answers in advance. Reinforce that there are plenty of reasons why you and

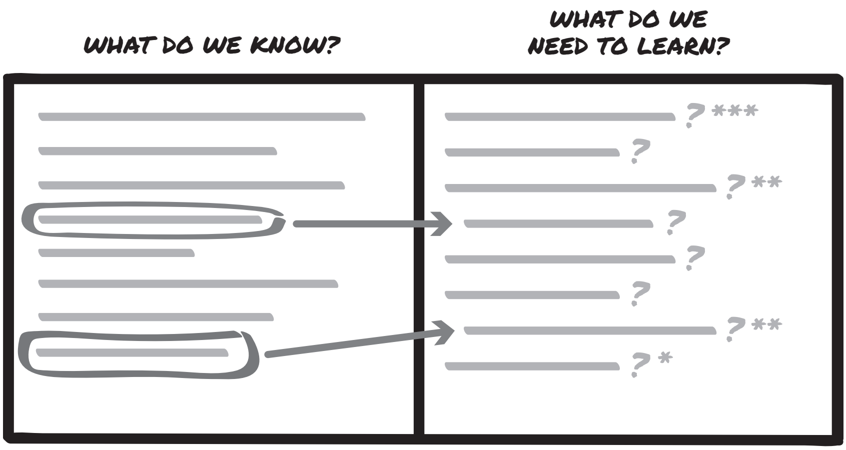


FIGURE 7 "What Do We Know? What Do We Need to Learn?" example output

your team might not know something, and only a handful of these reasons reflect poorly on the team.

What do we know about this problem?

This is information or data that your team will be referencing throughout the project.

What do we need to learn about this problem?

These are gaps in information or data that your team has about the problems you're trying to solve. If your team is accustomed to talking about information or data in terms of confidence, then use that terminology, especially if you know you're working with low-confidence, outdated, or unreliable data. For example: "What information do we have that is high-confidence around this problem?"

2. Share your individual perspectives

Set up this ritual's diagram in a location that all of your team members can see. Label the two columns with these questions: "What do we know?" and "What do we need to learn?" Have each team member share their answers, then place them in the appropriate column.

3. Identify assumptions

Start with the left column. For each item ask the team: "How do we know this is true?" If the team accepts that an item listed is true, it's an assumption that your team can build on through the project. If the team isn't confident that it's true, move that item to the right column.

4. Create questions the team needs to answer

Restate each item in the right column as a question. Ask team members which of the questions are the highest priority to answer. Then decide, as a group, who would like to take the lead in finding answers for the team.

Capture the output from this ritual in a place that your team members can reference. Over time, it can become a running record of what your team is learning throughout the project.

Routine Clarify Assumptions after Each Project Milestone

We encourage teams to do this ritual after key milestones in the project process, because your understanding of what you're trying to accomplish changes over time.

Onward to Success! Wait, What's That?

Now that your team has a problem to solve and an audience to serve, they're ready to go. There's just a minor sticking point: How are they going to know if they're doing things right? The next chapter will help your team define metrics for success that work for everyone, connecting the various agendas and needs of those that work across your organization.

What Does Success Look Like?

To succeed or not to succeed? That is the question. *Success* is a loaded word, and it means different things to people across an organization.

Each person on a cross-functional team is a representative of a department. You might have two engineers, a researcher, a designer, and maybe one or two folks from data science or marketing. Each department has its own skills, rules, and standards. Every person will be looking at success for your project with a different set of eyes. If you take the usual approach, looking for an overall success metric to unite the team, you're going to end up with something like: "We're successful if the product sells." But that won't satisfy everyone for long.

Instead, think of success less like a North Star and more like a constellation, with a star for each person on the team. Some stars are bright and obvious, easy to track and monitor, appealing and recognizable from all levels of the company. The brightest star usually gets priority—let's be honest, it's the one that makes the most money. Unfortunately, this bright star obsession has led to an explosion of terrible products on the market, burning teams and sometimes entire companies to the ground during their short yet brilliant lifespan.

Other stars take more time to see clearly. The goals of one function or department may only be visible to those who are trained to look for them. When we share ideas on a team about what's going to help us reach outcomes that are deemed "successful," we can lose sight of the individual goals of each team member and how they contribute to the constellation.

The rituals outlined in this chapter will help your team determine what success looks like and what success may *not* look like. Then, you can clarify expectations about what your team members are responsible for doing, and identify what recognition and rewards the team should receive as they move through the project.

RITUAL What Does Success Look Like?

This ritual helps teams understand how individuals think about their own success and how that contributes to an overall picture of success for the team. This helps your team see the constellation of their effort before they begin their project work.

1. Write what success looks like

Ask your teammates to write on individual sticky notes what personal success looks like for them on the project, and what success could look like for the team as a whole. It helps to differentiate between personal success and team success by using different colored sticky notes, or marking each note with the words *me* or *the team*.

2. Share what each person thinks

Set up this ritual's diagram in a location that all of your team members can see. Give each team member a row in the left column. Ask

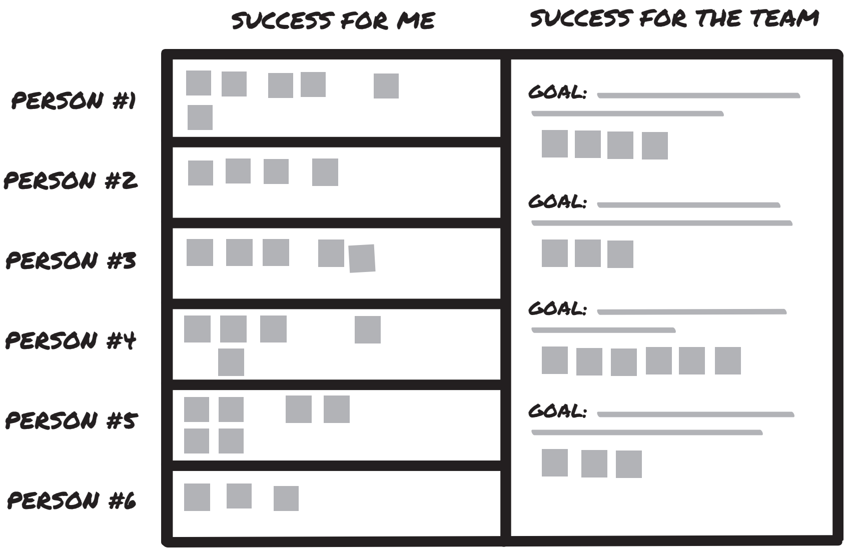


FIGURE 8 "What Does Success Look Like?" example output

each team member to share their personal success goals. Post these in the diagram in the left column, organized by team member. Then share success goals for the entire team, placing those on the right side of the diagram. It's likely that team members will start clustering similar goals as they share.

3. Decide what success looks like for the team

Ask each team member to focus on the right column and identify which goals are most important for the team. The facilitator should cluster similar items and capture the team's decisions. Then, move to the other column, discussing and clustering as you move through the goals. Ask team members to identify which individual goals could be supported by the team, and whether these goals should become part of the overall team goals.

4. Create goals that the team can reach

At the end of this ritual, the team should be able to definitively say what's needed to achieve their overall goals. For each shared goal, have the team describe what success will objectively look like.

For example, if the team says success means that more customers will use a product the team has improved, exactly what will that usage look like? How will it be measured? For things that can't be easily measured, consider how the team will know if they've achieved that success condition. For instance, the CEO liking what the team has created may be important, but receiving additional funding or headcount to continue the project is critical (and likely a better indicator of success).

5. Capture what you've created and share it with the team

When your team completes the ritual, capture what you've created and share it with everyone present. The output of this ritual is a team commitment, so make sure everyone is comfortable with what's included. Let your teammates review the information and make any necessary changes before it's shared more broadly.

Routine What Does Success Look Like Now?

As a project progresses, what success looks like may change. As a team, return to your vision of what success looks like and make sure it still applies.

Routine What's Success for This Project Milestone?

Teams can use this ritual for interim project milestones or major tasks that need to be accomplished during the life of the project.

RITUAL What If We Don't Succeed as a Team?

This ritual helps teams identify situations in which they wouldn't be deemed successful. This can help your team to plan for and mitigate potential risks. If this ritual is facilitated back-to-back with the previous one, it can help your team further refine their success criteria.

1. Write what you think failure would look like

Ask each team member to consider what project failure would look like for the team. Have them write their thoughts on individual sticky notes. If you're doing this ritual after the previous one, have

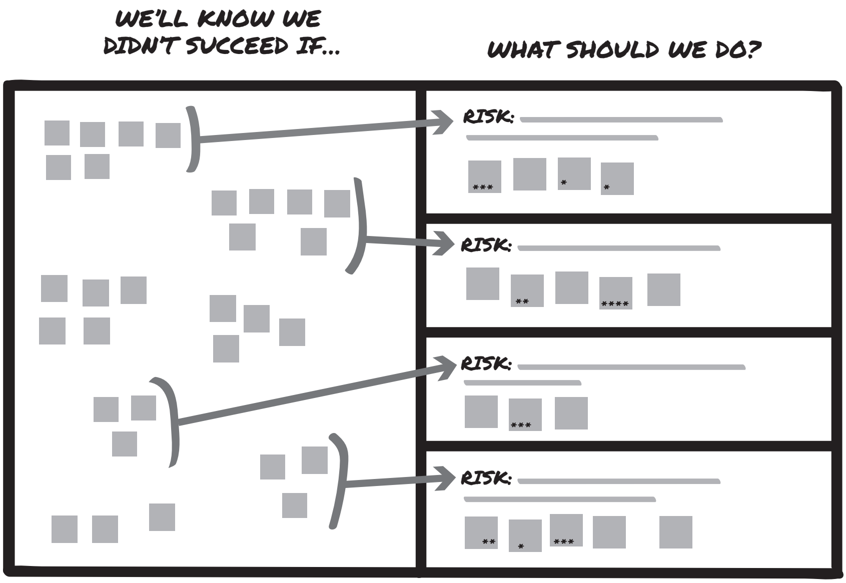


FIGURE 9 "What If We Don't Succeed as a Team?" example output

people think of the opposite of what the team said success would look like. If receiving additional funding or headcount to continue the project is critical, for example, the opposite of that could be loss of funding before the team could create and share their project results. Go beyond obvious blanket statements like "We'll lose our jobs." Consider the positive things that may happen if your team doesn't meet your goals—not with a sense of blind optimism but with an understanding that every project has trade-offs.

2. Share what each person thinks

Set up this ritual's diagram in a location that all of your team members can see. Ask each teammate to share what they wrote, then post their sticky notes on the diagram in the left column.

3. Decide which risks to address

Visually cluster similar items. Ask your team members to identify which are the most important to address as they start the project. Place each of these items on the right column, each with its own row. Try to limit yourself to no more than seven items.

4. Create ideas to mitigate each risk

Ask everyone to create ideas for how each risk could be mitigated, with one idea per sticky note. When all team members are done, have them post their ideas in the right column next to each risk.

5. Decide which ideas to implement

Silently read through the ideas on the whiteboard. Have everyone mark with a star the ideas they believe are most appropriate to try. When each teammate has voted, discuss which ideas received the most votes and why.

To complete this ritual, summarize the risks your team will be addressing and add the selected ideas to the team's action items.

Routine Stop Work to Assess Potential Risks

This ritual can be repeated at any point in the project to address new risks and identify tactics to address them.

RITUAL What Is Our Team Expected to Do?

"Hey, that's *my* job. That's what *I'm* supposed to be doing." When you hear team members making statements like these, it's likely that expectations regarding who's doing what weren't clear when you started the project. In these situations what team members

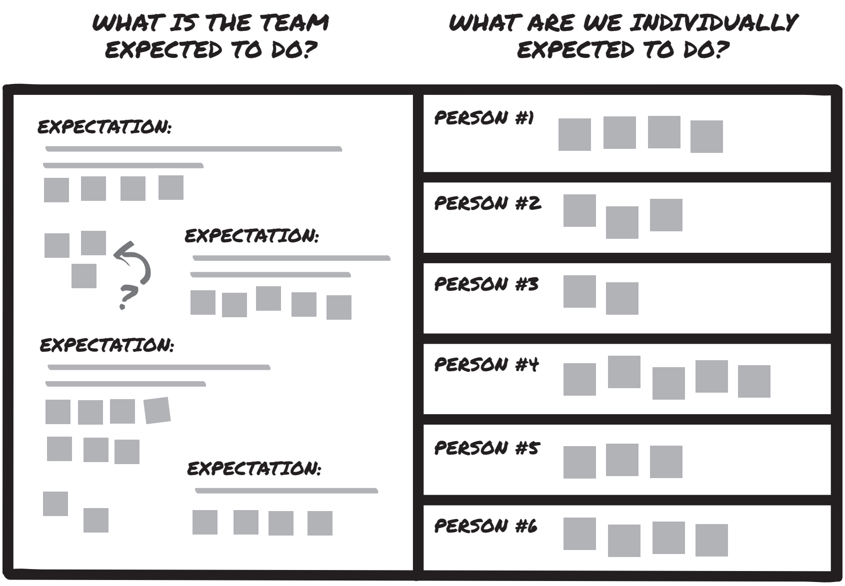


FIGURE 10 "What Is Our Team Expected to Do?" example output and leaders want to be hearing is this: "What is our team expected to do? What are we individually expected to do to make the team successful?"

This ritual helps teams determine what they're expected to accomplish as a collective unit before breaking that down into individual work responsibilities. It helps teams reclaim some autonomy and agency when they've been stuck with a "solutioning" project. We like to use this ritual when it isn't clear how team members will divide up the work that needs to be done, or when there are team members with blurry or overlapping disciplinary responsibilities.

Most rituals in this book take about an hour. This one can easily go longer, however, as discussions around specific expectations can get detailed and complex depending on the type of project or the departments involved. Prioritizing expectations can also be a lengthy discussion, depending on the stakeholders involved. This ritual can be a highly educational experience for all parties.

1. Write what you think the team is expected to do

Ask each person to consider what expectations they believe the team will need to fulfill if the project is going to be successful. Have your teammates write these expectations on individual sticky notes. Give the team at least ten minutes to think through these expectations or have them do this step in advance.

2. Share what each person thinks

Set up this ritual's diagram in a location that all of your team members can see. Make sure each team member has their own row in the right column. Ask each teammate to share what they wrote, then place their sticky notes in the left column.

3. Decide what the team is expected to do

Ask your teammates to identify which expectations are top priorities for the team. During this discussion you may need to write on the diagram some of what was on the sticky notes for clarity or context.

Before moving on to the next step, ask the team: "Are there any other expectations for the team we should discuss?" Ideally, at this point you have a short list of expectations that the team can reference through the rest of the ritual. If there are any team expectations that look unreasonable, adjust them now, before the project starts.

4. Identify what you are personally expected to do

Say to the team: "Now that we've figured out what expectations are most important for us as a team, let's consider what we will do individually to make sure we meet those expectations. Take about ten minutes to write down what you believe you'll be expected to accomplish in support of the team."

Like before, have your teammates write these expectations on individual sticky notes. Give them at least ten minutes to think through these expectations.

5. Share what each person thinks they are expected to do

Ask each team member to share what they've written. Place their personal expectations in their row in the right column.

6. Decide what each person will take on

See if there are any overlaps in responsibilities or work expectations, and clarify them with your teammates.

To complete this ritual, capture what you learned in a place that everyone on the team can easily reference.

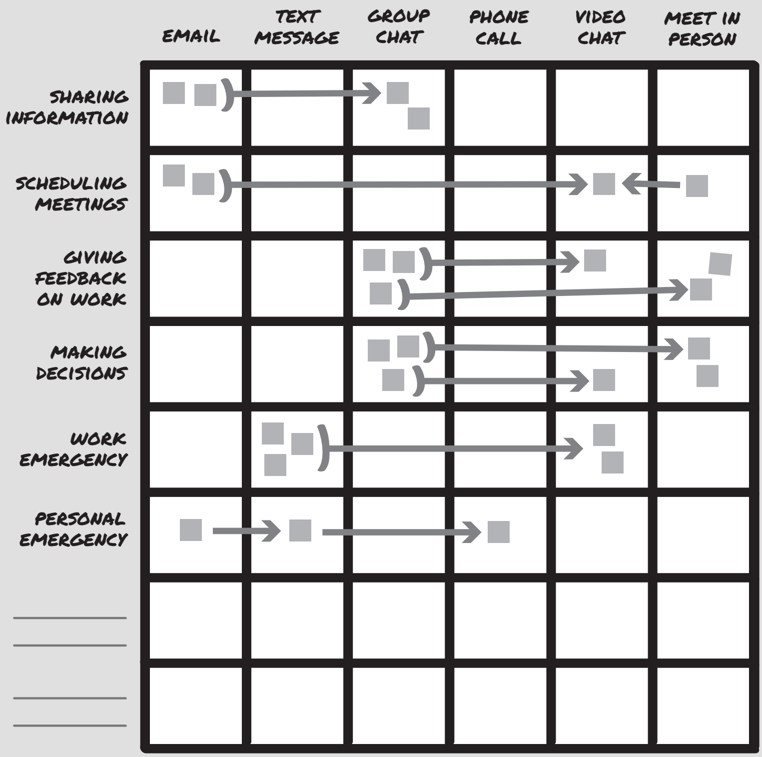
How Are We Communicating?

Email, videoconferencing services, face-to-face meetings, phone calls, text messages, and instant-messaging notifications are constantly vying for our attention, along with regular pings from our personal and professional social networks. This is even more pronounced with remote workers, where these channels are the only way to stay in touch. Some channels feel right to you (you send instant messages after 7 p.m. because you have small children), while others can feel alienating (your manager gives you tough feedback on a failed project by text and you're convinced that he's conflict avoidant). For this reason we like to do a brief activity with our teams to help them create clear expectations about which communication channels we should use during our projects.

To prepare for this activity, set up the following diagram in a location that all of your team members can see. To the left of the first column, list the common reasons why your team members would need to communicate with each other. Add any that are relevant for your team. Above the first row, list all the different communication channels that your team is likely to use.

Ask each team member to consider how they'd want to be contacted in each of these situations. This means that they will be identifying the specific communication channel that they would want to be reached through, and how that communication would happen. For example, if you wanted to give feedback to another team member about work they created, you might write down: "Send note over group chat asking my teammate if they have time for feedback on their work." Everyone should write their items on individual sticky notes.

By now, everyone on the team will have shared how they would like to respond to a wide range of situations. As a team, decide for each situation what the preferred communication approach is. In some cases, you will have similar preferences. In other cases, there



"How Are We Communicating?" example output

could be diverging opinions about the best way to respond to a situation. The approaches may escalate from asynchronous communication channels such as text messaging or group chat to synchronous communication like voice calls, videoconferencing, or face-to-face meetings.

When you're done with this activity, capture what you learned in a place that everyone on the team can easily reference.

Routine Clarify New or Shifting Expectations over Time

Repeat this ritual after a few weeks to see if new expectations have developed, especially as different stakeholders become involved. Gaps in expectations often aren't apparent until a team has produced enough work to compare what's been created with what others in the organization think *should* have been created.

Routine Update Team Expectations after Changes in Staffing

It's helpful to review information from this ritual when new people join the team, or when a person leaves the team and work responsibilities need to be redistributed.

RITUAL What Should We Celebrate as a Team?

Starting a new project can be an emotional rollercoaster. Our hopes, aspirations, and fears blur together in a haze. The first thing on our mind is figuring out what we need to do on the team to play our part. The last thing on our mind is how we're going to celebrate a job well done.

Then a curious thing happens. As the team chips away at early milestones, we achieve an early measure of success—and we don't really talk about it. We figure out what we need to do to deliver great work, but we rarely consider how to reward each other for it. As a result, all those great deeds go uncelebrated. All those opportunities for positive reinforcement are lost.

Then there are perceived failures on your team. The moments where someone makes a mistake, or the team's early hunches turn out to be wrong. But even if you've run an experiment that's ultimately deemed a failure, it can be a cause for celebration based on what the team learned. These situations are rarely recognized as being a positive benefit to the team.

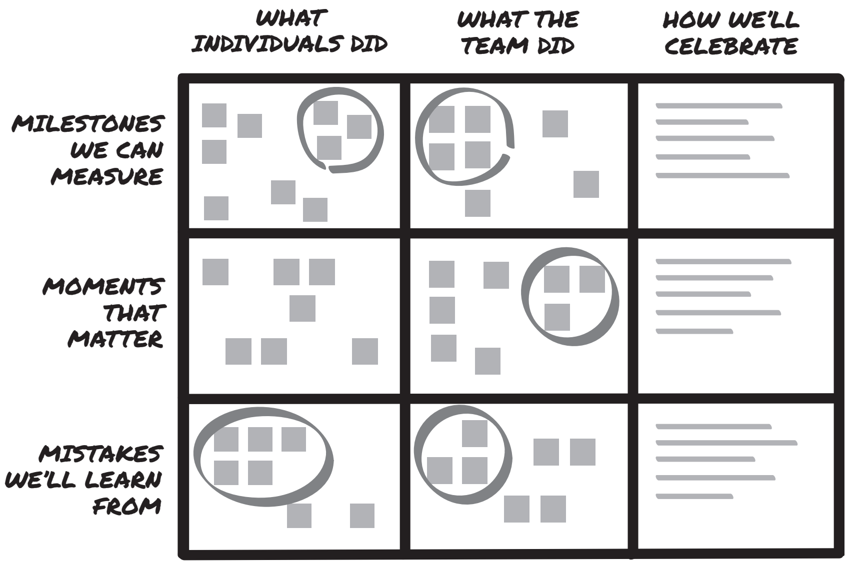


FIGURE 11 "What Should We Celebrate As a Team?" example output

In the following ritual, you'll decide what things to celebrate as a team—both the good and the not so good—before proceeding too far into a project.

1. Identify situations to celebrate

Set up this ritual's diagram in a location that all of your team members can see. Ask them to individually write down what situations they would want to celebrate during the course of the project. They should think of things for each row in the diagram, which relate to both the work of individual team members and the team as a whole.

2. Share situations to celebrate

Ask each person on your team to share what they wrote, then place their sticky notes in the appropriate row and column.

3. Decide what situations to celebrate

Ask each team member to select three to five situations they think are most important to celebrate. Have them silently mark their preferences by placing a star on individual sticky notes, or they can write their preferences on a sheet of paper before discussing them with the team.

After everyone has shared their preferences, decide as a team which ones you want to celebrate.

4. Create ideas for how the team will celebrate

Generate ideas for how the team can celebrate each of the selected situations. Ideas could be anything from spoken appreciation to team outings or tangible rewards. Be creative!

5. Decide which ideas to try

Decide which ideas you want to put into practice for the team. To complete this ritual, ask team members which situations they want to own, so it's clear that everyone on the team can support these moments for celebration. Since the planning required for celebrating these moments will overlap with everyday project responsibilities, be realistic about how much team members can take on.

Capture the output from this ritual in a form that team members can refer to throughout the project.

Routine Signal to Your Team There's Cause for Celebration

Anyone on your team should be able to identify something that happened as a cause for celebration, even if a project is rebooted or canceled. Use the same approach outlined in this ritual to identify whether you're celebrating the meeting of a key milestone, reaching a moment that matters, or overcoming a mistake. As a team, identify what form of recognition you want to provide and when.

On with the Show

By this point your team should have enough information to support their ways of working, even if things don't go exactly as planned. And they've also got a good idea of the expectations that have been placed upon them. Their next step? Planning the kickoff meeting.

We'll tell you right now: plan to have cookies.

Plan the Kickoff with Your Team

A project kickoff can often seem like it's more for those *not* on the day-to-day team. We suffer through the bad PowerPoint presentations and cold coffee, and our input is usually solicited in the last few hours of the meeting with a halfhearted "Any questions?" What's the antidote to these one-sided kickoffs? Invite your team to help create the kickoff they want.

Organizations use kickoff meetings to accomplish different goals. No matter the aim, every team should be given the opportunity to step up and contribute to their project kickoff in a meaningful way. There are many benefits to taking this approach. Your team will be able to:

- **Pool all the relevant information and knowledge that they have.** There are always things an individual team member knows that could be relevant for the entire team.
- **Prioritize what information can be shared in advance.** This can save everyone valuable time and lead to more collaboration time in the kickoff itself.
- **Establish clear expectations for what team members can**

contribute. Your teammates will have deeper insight into how their actions can make the kickoff (and the project) a success.

- **Delegate facilitation and presentation duties.** Team members who have unique expertise or a desire to grow in their roles can lead key parts of the kickoff.
- **Demonstrate behaviors that the team wants to repeat throughout the project.** The activities that you choose to include in your kickoffs can reinforce your team norms. (Or work against them, if you aren't careful.)

The following rituals will help you determine who should be invited to your project's kickoff meeting, as well as what activities are critical to include in an in-person or remote kickoff meeting.

RITUAL Who Gets Invited?

Before worrying about what to include in the kickoff meeting, figure out who needs to be in the room. The people who are present will heavily influence how your team chooses to start the project, especially if you need to include external partners or customers along with internal stakeholders.

1. Identify who should be included

Set up this ritual's diagram in a location that all of your team members can see. Ask your teammates to think of all the people that may need to be a part of the project. Have your team members list these names on individual sticky notes, working from the following four categories (if you've ever drawn up something like a RACI matrix for assigning responsibilities, you'll notice some similarities):

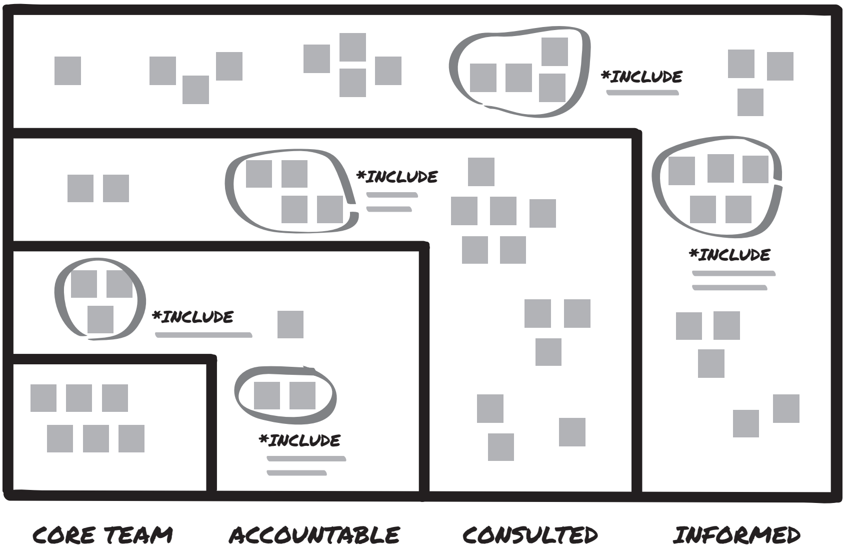


FIGURE 12 "Who Gets Invited?" example output

- **Core team.** The people doing the everyday work on the project, seen by others in your organization as having responsibility for the project outcomes.
- **Accountable.** The people who are sponsoring the project. They may participate in select team activities, provide input and feedback on your work, or sign off on key deliverables. They may not be exposed to every decision that happens throughout the project, but in the end they are accountable for what your team delivers.
- **Consulted.** The people whose input or opinions you'll solicit during the project, usually in a controlled setting or review cycle. They may be subject-matter experts from other departments or groups of people that will end up directly benefitting from the project. They may be partners

or customers that you want involved. It's up to the core team to determine how they want to incorporate this input. Some organizations call those who are consulted "the extended team."

- **Informed.** Groups that will hear about what you're doing through the course of the project. Your team isn't required to solicit their input or incorporate their feedback. They aren't viewed as part of the extended team.

This work can be done individually, in advance of getting together as a team for the next step. When your team is doing this step of the ritual, make sure they are identifying specific individuals, not departments or job functions.

2. Share who should be included

Ask each team member to share who they think should be included in the project and the reasons why. Place their names in the diagram in the appropriate location. If your team members have listed the same people and placed them in different categories, leave them up until the next step of the ritual.

3. Decide who will be included

By this point, all teammates have contributed to the list of people. As a team, discuss which people should go into each of the categories of core team, accountable, consulted, and informed. With each decision, move their names to the appropriate category in the diagram.

4. Narrow the list to kickoff attendees

Now that everyone on your team has a clear picture of who they'll be interacting with over the life of the project, consider how many kickoff activities these individuals will need to be a part of. Answer these questions for each category of people:

- Who should be part of the kickoff meeting from this category?
- How involved do they need to be? Are they there just to be informed or to contribute their perspective?
- How much time can we expect them to be in the room?
- Will they be expected to attend in person, or remotely?

In our experience consulted parties may just need to hear about the project goal and scope so they can offer their thoughts. Accountable parties may need to be there for the entire kickoff.

As a follow-up to this ritual, begin communicating with the people you're inviting in order to set expectations for their involvement. You may need to share your team's thinking from this ritual with those in the accountable category, as they may have additional input for your team to consider.

Routine Decide Who to Involve in Project Meetings

The output of this ritual can be used anytime the team is trying to identify the people to include in meetings throughout the project, especially if significant reviews of research or deliverables are scheduled.

Routine Add New People to the Project Team

Stakeholders will be added or removed from your project over time. Revisit the output from this ritual and revise it based on how the team thinks these stakeholders should be involved.

RITUAL What Activities Should Be in the Kickoff?

Once you know who's attending the kickoff, and how much you need your participants to contribute, work with your team to determine what activities are critical. In our experience, the right sequence of activities may merit more time than you'd initially allocated. We've been in productive long kickoffs that flew by because they made the most of the team's time. We've also been in short kickoff meetings that felt twelve years long due to poorly considered or irrelevant activities. As you go through the following ritual, your team will need to make hard decisions about what activities need to be part of the kickoff.

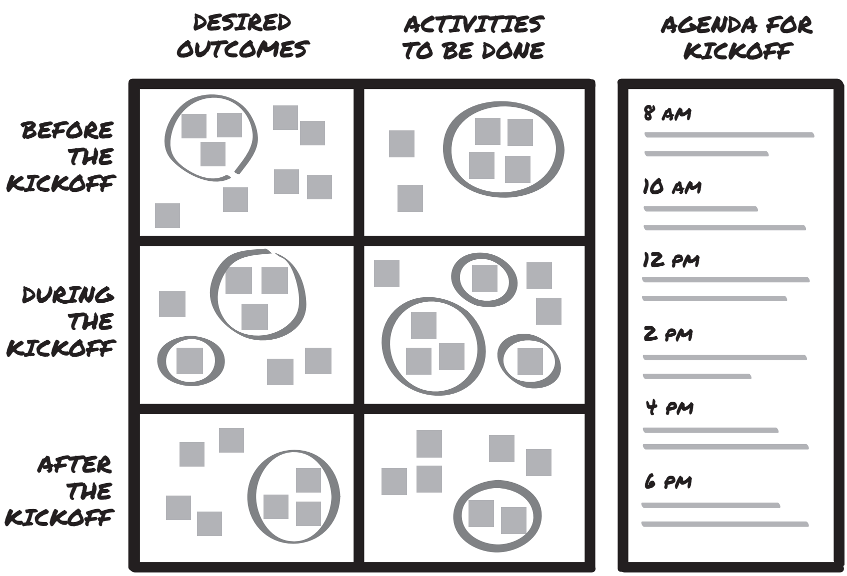


FIGURE 13 "What Activities Should Be in the Kickoff?" example output

1. Identify outcomes for the kickoff

Set up this ritual's diagram in a location that all of your team members can see. Ask team members to individually answer the following question: "What outcomes are critical from the kickoff?" Have everyone write their answers on individual sticky notes. Answers will vary for every project that you work on. Here are a few examples:

> "Understand stakeholder expectations for this new project."

> "Determine individual roles for the project team."

> "Agree on the problems we're trying to solve on this project."

> "Finalize the scope of what can be delivered by the deadline."

2. Share outcomes for the kickoff

Ask each team member to share their outcomes, and why each one is critical for project success. Place their sticky notes in the left column.

3. Decide which outcomes are most important

As a team, discuss if each outcome needs to happen before the kickoff, in person during the kickoff, or after the kickoff. Arrange the outcomes in the appropriate rows in the diagram's left column.

4. Create activities to reach the outcomes

Ask everyone to write down what activities the team could do in the kickoff to help achieve the selected outcomes. Give the team a rough estimate of how much time is available for the kickoff meeting, so they have a sense of the constraints they are working within. Have them write their answers on individual sticky notes.

Here is a list of activities that we like to include in kickoff meetings, including rituals we find beneficial for longer-term project teams:

- Icebreaker (Get to Know Your Teammates)
- What Do We Value As a Team?
- Project Goals
- What Problem Are We Trying to Solve?
- What Does Success Look Like for the Team?
- Team Roles and Expectations
- Project Schedule and Planned Activities
- Communication and Collaboration Plan
- Next Steps

5. Decide which activities are critical for the kickoff

As a team, place your ideas for activities on the whiteboard in the second column. Discuss which activities your team is most confident will lead to the outcomes you want. We like to focus this conversation with questions like:

- What information must be shared at the kickoff, so everyone hears it at the same time?
- What information can be created and distributed in advance, then summarized during the kickoff to speed things along?
- What information needs to be discussed with the team, to make sure all questions are answered?
- What activities need to happen with the entire team present,

so everyone's voice is heard and incorporated into key decisions for the team?

Based on what the team decides, the facilitator of the activity can begin writing a draft agenda in the right column. While doing this, the facilitator should solicit the team's input on how the activities should be ordered in the agenda. This is a great time to ask what activities team members would like to manage and facilitate. Add their names to the agenda items and set expectations for when they'll need to check in with their content for the kickoff.

To wrap up this ritual, send a copy of the draft agenda to the team for any final comments before you send it to stakeholders.

Routine **Design Meetings with Your Teammates**

Use this ritual to co-create agendas and activities for major project meetings.

Keep It Going

You've discussed and planned. You've finished the kickoff. You've normed and bonded, and now you're settling into the everyday life of a project team. Tuesday becomes Thursday becomes next week becomes next month. The team seems happy, the work is moving along well, and everything feels pretty good.

Until…

PART 2

WE'RE STUCK, NOW WHAT?

Your team members are dialing in to the videoconference from across the globe. Some faces are illuminated by the glow of their screens, others by the early morning sun. On those faces, emotions flit past: concern, confusion, irritation, fear. You're not having this meeting because things are going well on the team. Somewhere along the way, something broke in how you're working together. This is the meeting where you have to figure out how to fix it.

So here's the good news: Just because it's hard for your team right now doesn't mean that your team is messed up. Over the years we've encountered more and more teams that define a "good" team as one with minimal conflict. They describe a frictionless utopia of no complaints. At the same time, they describe being bothered by their teammates avoiding responsibility when things aren't working. They're uncomfortable in team situations where they have to deal with the normal ebb and flow of human behavior. This type of thinking is destructive to teams. Stormy days can be a good indicator of team health. Comfort should never be the reason why your team avoids talking about a problem.

Deciding to solve an important problem within your team is the strongest act of team-building. If you can put your finger on the thing you believe is causing your project to go off the rails, then the team probably needs to address it. Not behind the scenes, in whispers. Together, in the open. After all, there's a line between comfort, discomfort, and complete dysfunction.

In this part of the book we'll provide rituals to help you work with your teammates on everything from giving each other feedback, to making tough decisions as a team, to testing solutions for those issues as a collective act. The major difference between the rituals in Part 1, "Better Beginnings," and those in this part of the book is that your team can reference specific examples of what they did (or didn't do) when working together. These rituals can help the team get back on track and provide you with new tools to keep those situations from cropping up again.

Create the Right Kind of Conflict

It's amazing the lengths that people will go to avoid an argument. This is unfortunate. When we're invested in the work we're doing, we're more likely to stand up for our beliefs and what's best for our project. If we move too quickly from argument to agreement, the quality of what our team is creating may suffer.

But it's *how* we stand up for those beliefs, and how we negotiate conflict as a team, that can be challenging for everyone involved. While *conflict* can be a loaded word in many work cultures, conflict isn't always a bad thing. If we disagree with someone on our team, it means we have to be ready for debate, for challenging other people's opinions just as much as our own. These behaviors are rarely comfortable, and the rules of engagement aren't always clear.

In this chapter we'll provide a set of rituals and activities that focus on situations where it's likely you and your team will come into conflict: how you deliver and receive critical feedback on your team's work and how your team is working. In the next chapter we'll provide rituals that help teams move from handling that feedback to making critical decisions together.

Even Great Team Members Can Sometimes Behave Like Assholes

Every team starts with the best of intentions. People want to treat each other well, be awesome at what they do, and make their teams successful. But when long workdays and big goals grind down the resolve of your coworkers, at some point one of your teammates will end up behaving like an asshole.

People don't wake up in the morning and say, "Today, I'm going to be a jerk at work." They may not even be aware they're behaving like one. As Robert I. Sutton explains it, some teammates will have a "bad day or a bad moment," but they aren't "persistently nasty and destructive." He calls these people "temporary assholes" in his book *The No Asshole Rule*.

The question is, how do we handle these situations when they come up?

Great teams acknowledge the inherent messiness of human behavior and discuss it openly. They work together to incorporate changes into their communication patterns, and they apologize if boundaries are overstepped. They don't use personality types, communication styles, or cultural differences as excuses for poor behavior. If someone does behave like a jerk, they acknowledge the feedback of their teammates, apologize for their actions, clean up the consequences, and willingly try to make changes in the future.

That said, know the difference between a team member temporarily behaving like a jerk or behaving like what Sutton calls a "certified asshole." These are people who "display a persistent pattern that ends with one 'target' after another feeling belittled, put down, humiliated, disrespected, oppressed, de-energized, and generally worse about themselves." If this is the case with someone on your team, talk with your manager or give HR a ring.

RITUAL Can I Give You Some Feedback?

The most basic form of conflict on many teams comes about when we give and receive negative feedback. We struggle with negative feedback because of how we react to it as individuals, and those reactions can influence how we participate in critical debate with our teammates. (Side note: Most teams we encounter use "giving feedback" as code for saying negative things. Teams rarely clarify how they want to receive positive feedback, and this is an overlooked opportunity.)

Books like *Thanks for the Feedback* by Douglas Stone and Sheila Heen provide wisdom on how to best receive feedback from others. But to make use of their advice, we need ways to routinely give and receive feedback in a supportive manner.

First, a moment of clarity. If someone's providing you with feedback, it's about something that you or the team created in the past (a work product), or that you did in the past (a task or behavior). The feedback is not about you in the present moment. This is important, because when we hear negative feedback, our gut response is to take it personally. We associate negative feedback with our identity in the here and now, and we get caught up in defending our identity or explaining ourselves. But feedback, both positive and negative, is about how to take what's being said about the past and apply it to the future. If you're receiving positive feedback, keep doing what you're doing. If it's negative feedback, use that input to change course as needed.

Second, if we hear feedback that we don't think is true, our immediate reaction is often to dismiss it. But the feedback *might* be true. Our beliefs may not be. We have to understand other people's feedback as deeply as our own assumptions and beliefs in order to recognize whether we are missing something. (Another side note: Understanding feedback does not have to mean that you agree with it.)

Third, when receiving feedback, we can fall into the trap of considering our relationship with the other person or group instead of listening to what they're saying. *Oh, the Marketing department doesn't like us very much, so that's why they're saying there are some problems.* The first part of that statement may be true, but the Marketing department could be saying there are problems with the work because there actually *are* problems with the work. You might not be seeing those problems through their eyes.

The next ritual will help you and your teammates improve how they deliver and receive feedback. It's not intended for the entire team to be present for this ritual. Depending on the type of feedback you are sharing, it may be more appropriate to discuss it one-on-one with specific teammates.

The ritual uses the following framework for labeling and sorting feedback, which was first created by product manager Arthur Nicholls and adapted for these rituals:

Reinforcing feedback

This type of feedback is intended to preserve aspects of the team's work or behavior. People often call this "positive" feedback, because it can affirm what's perceived to be working well. An appropriate response for this type of feedback is: "Thank you. We'll keep that in mind when moving forward."

Adjusting feedback

This feedback is intended to change something regarding what your team has done. The person isn't telling you to throw out what you've created and start over, or to never repeat something that you did in the past. Rather, they're suggesting *adjustments* to your team's work product or behavior. Overall, things are headed in the right direction. Your response to this form of feedback might be something like: "Based on your feedback, it sounds like I need to adjust the type size on the web forms so they are easier for people to read. With those changes, it'll be more usable."

Rejecting feedback

This kind of feedback involves a request to completely replace something with another idea or behavior. When receiving this type of feedback, a few common scenarios may come up. You may be asked to stop doing something, with no suggestion of what to start doing. You may be given specific ideas to replace work that you've created, or to change your behavior in the future. You aren't required to accept other people's suggestions as replacements in the moment. You only have to thank them for providing the feedback to you, and say that you'll get back to them with a response about what you might change.

1. Tell a teammate you want to provide feedback

Signal you'd like to provide some feedback with a simple question: "Hi, Chris. Do you have a few minutes to discuss some feedback?" Don't load this question with the specific subject matter, as that can immediately cause concern from the other person. Give them control over when and where they would like to talk.

2. Start the conversation with clear intent

Explain why you've chosen to provide feedback, and how it's intended to contribute to the work. Make sure they have some context for what you'll be discussing, before diving into the details. For example: "I was thinking about the web form designs you shared with the team. I have some thoughts about them."

3. Share feedback with your teammates

Now share your feedback. When talking about work product, be clear if you are potentially reinforcing, adjusting, or rejecting some aspect of what was created. Don't say: "I was thinking the web forms might be frustrating for people." Instead, clarify with something like this: "I was thinking that there are two places in the web forms that people on smartphones might have trouble filling out. Let's look at each of them, and I'll share with you what I think could be adjusted."

Carry the same logic over to sharing feedback about a teammate's behaviors. Describe what led to the behavior you observed and the impact of their actions from your perspective. Be clear about the behaviors you want to see, especially if the behaviors were agreed upon by the team in previous rituals. Avoid generalities or vague words that can disguise and confuse the details of a particular issue that really needs to be discussed. Also, unless you're a manager, avoid being a go-between for feedback about behaviors.

4. Listen to their response and clarify

Listen to the other person as they respond to your feedback. Answer their clarifying questions and try to understand things from their perspective. They may provide you with feedback in response, so you'll both need to take turns listening and clarifying as needed.

5. Summarize next steps

Depending on the feedback you've provided the other person, summarize the appropriate next steps with them. Each of you should have some follow-up. As with other rituals described in the book, this one may or may not have visual output. For some feedback sessions, the conversations may only have the summary of next steps as the output. That's fine. We've worked with teams that use sketching to co-create solutions during feedback sessions, while other teams choose simple summary emails as the output. Feedback sessions are the one ritual where we give you permission to forego whiteboards and sticky notes in favor of a more private approach as necessary.

Routine Solicit Feedback from Project Stakeholders

Keep this ritual in mind whenever you are soliciting input from project stakeholders or decision-makers. Start the conversation with the following information: "These are the project goals. . . . We are at this point in the process. . . . This is the feedback that's most valuable

Feedback Should Create Friction, Not Tension

A healthy amount of friction is good for everyone. Until it isn't. *Friction* becomes *tension* when people don't feel comfortable sharing feedback and they're unable or unwilling to address ways to lessen that discomfort.

So how do you work through these situations? Set norms about how you want to talk to each other, from the very start. (The ritual "What Do We Bring to the Team?" can help with this.) Be ready to refer to examples of what's the norm and what falls outside the norm, both for written and verbal communication. Give people feedback right away if you believe they aren't meeting shared communication norms. If your team can't communicate about how you want to communicate, it will be hard for things to improve.

to us at this point in the project. . . ." Go through the same process of understanding and clarifying the feedback, sorting it based on its implications, and summarizing its impact. For situations where the feedback is complex or contradictory, use the next ritual.

RITUAL What Should We Do with This Feedback?

Once your teammates are comfortable with giving and receiving feedback, they're likely to have more of it as part of their day-to-day routine. Your team will need to discuss and address this increase in feedback. The following ritual will help team members make sense of feedback as a group and identify what changes are critical for the project.

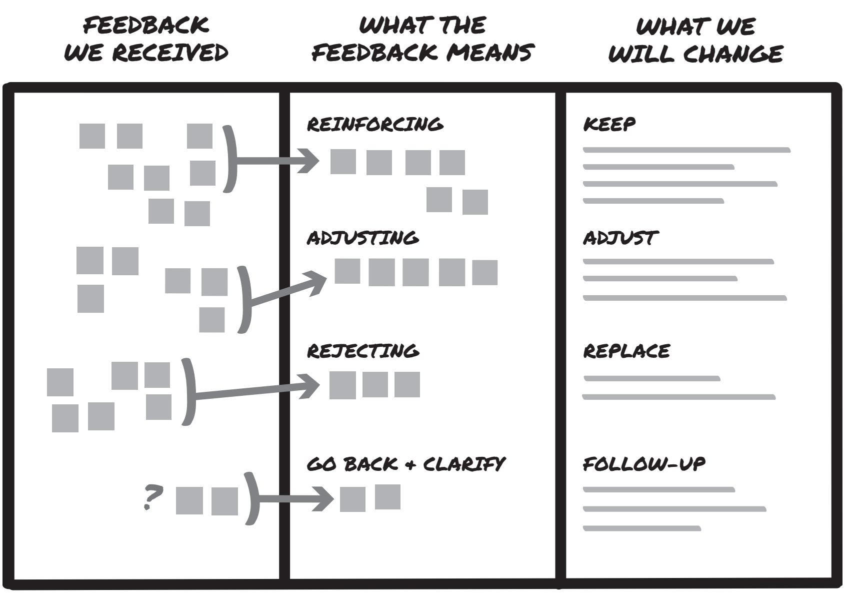


FIGURE 14 "What Should We Do with This Feedback?" example output

This ritual can also be used when you've received feedback from project stakeholders or customers, and you need to assess the implications of the input as a team. Simply translate the feedback into a format that's easy to place on the diagram and move around as necessary.

1. Write down your feedback

Set up this ritual's diagram in a location that all of your team members can see. Review the definitions of each category in the center column with your team (definitions are included in the previous ritual). Then ask them to individually write down the feedback they have on something specific, such as a work-in-progress deliverable. Have each teammate write their answers on individual sticky notes. As in the previous ritual, avoid generalizations or vague feedback.

2. Share your feedback

Ask each person to share their feedback. It is especially important during feedback sessions that everyone is given equal time, as we described in the "Give Equal Time (A Hard Thing)" sidebar in the introduction of this book. After each person is done, place their feedback in the left column.

3. Decide what the feedback means

See what feedback was suggested by multiple team members. Discuss those points and identify whether they are reinforcing, adjusting, or rejecting aspects of the work. Place those points of feedback in the center column in the appropriate row.

Review the rest of the sticky notes, working with team members to understand each point of feedback and categorize it appropriately in the second column. If there's any feedback that is unclear, put it in the "Go Back and Clarify" row in the second column.

4. Identify what to change

Now that your team has categorized all of the feedback, review it with the team and decide whether you'll make changes to the project work as a result.

For reinforcing feedback, consider what needs to stay in the team's work so that it continues to be successful. You may need to adjust or remove particular aspects to make sure what's working continues to do so.

For adjusting feedback, decide what changes your team wants to prioritize based on where you are in your project.

For rejecting feedback, consider what needs to be replaced or changed in the team's work to fully address the feedback.

Place the team's changes in the right column. The team may have limited time or resources to act on feedback, so this is a good time to debate trade-offs.

5. Decide what changes to act on

After the team has decided what changes are necessary, decide who will be implementing them. These action items should be distributed to team members as an output of this ritual. Don't forget to include necessary discussions to follow up with any parties that provided feedback to the team.

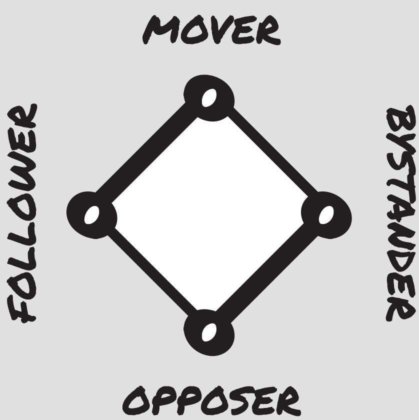
Routine Triage Feedback as It Comes In

Repeat this ritual at any point your team needs to triage a high volume of feedback.

How to Be a Better Team Player During Debates

You're a good listener. You're adept at soliciting feedback and asking clarifying questions. But while working on a team, situations will come up where you'll need to debate a wide range of ideas before deciding on which to implement. These conversations can be challenging, even though there are consistent patterns for how we act during them.

David Kantor developed a theory called the Four Player Model that describes "the four basic types of 'players' individuals tend to be as they speak, and the actions associated with that player type." In his book *Reading the Room: Group Dynamics for Coaches and Leaders,* Kantor says that there are only four ways that people "play" in conversation: Mover, Follower, Opposer, and Bystander. People on teams dynamically shift between these player types, depending on the issues being discussed. Once you're aware of these "players," you'll better recognize them in both your everyday interactions and also when you're debating ideas with your team.



The Four Player Model by David Kantor

(continued)

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Mover: "Here's a direction I think we can take..."
Movers take a topic, decision, or idea and encourage the team to carry it forward. What they say motivates others to think or do something. Anyone on the team can be a Mover during a conversation—this role is not reserved for the team leaders.

Follower: "I'm going to help make that idea happen..."
Followers support a particular direction in a conversation. Without Followers in a conversation, there's little chance of a team reaching an agreed-upon outcome. Ask Followers if they have any ideas or feedback to improve what's being discussed or any alternative approaches to consider.

Opposer: "I'm not sure that's a good idea, for these reasons..."
Opposers debate the merits of what's being discussed by your teammates. Without Opposers, there is no correction during your team's conversation. Opposers can help teams make better-informed decisions, but their points of debate may come at the wrong time. A team member can't spend all of their time as an Opposer in every team conversation—otherwise, no decisions would ever be made.

Bystander: "I need to observe and reflect..."
Bystanders are teammates who aren't speaking during a conversation, but who are still actively observing and reflecting on what's happening. Without Bystanders, there is no perspective on what's happening in that team conversation. The larger the group, the more Bystanders you'll have. Bystanders should be encouraged to share their thoughts and perspectives, so they're involved in shaping decisions.

Once you know how to identify how team members are "playing" in a conversation, you can deliberately choose how you'll act, both to foster debate or to advance the discussion. You can use conversational cues to encourage others to shift their player type. Be sure to use cues to support team goals, not to advance personal or political agendas.

RITUAL How Can We Improve Our Project Work?

Ongoing feedback is important for team members to better understand each other's work and identify areas for improvement. This ritual can help team members have open dialogue about their work in progress. Teams that are creating tangible deliverables around the delivery of products, services, or marketing experiences will benefit most from this ritual. Within design and innovation teams, these meetings are sometimes called work share meetings, critiques, work updates, or showcases.

This ritual won't solve every problem when it comes to a team creating higher quality work. It also isn't intended to help teams create better solutions by committee. This ritual *does* help team members clarify their intentions for in-progress work and expand the number of options available to them.

Before you start the ritual, assign one person to facilitate. The facilitator will be responsible for keeping everyone on time and on task. This person will also ensure that feedback remains constructive. Consider rotating this responsibility.

1. Establish the format

Confirm the agenda with attendees before beginning the ritual, so they know who is presenting. Each person presenting has a set amount of time to share their work and answer questions. The facilitator should review the time limits and the list of presenters before beginning.

2. Share each person's work

The first presenter shares their work. They explain where they are in their project, what problems they are currently trying to solve, and what input would be most valuable to advance their work. If you are the presenter, avoid excuses, personal comments, and vague descriptions of your work. None of these will help your teammates provide better feedback.

3. Ask each presenter open-ended questions

After listening to the presentation, the other team members should respond with open-ended questions. Depending on the type of work, these questions can help team members better understand the work and the rationale behind it. Our favorite questions to ask in this ritual are:

- What goal are you trying to achieve?
- What problems are you trying to solve?
- What questions are you trying to answer at this point?
- What type of feedback would be most valuable for you at this point?
- What are your current assumptions?
- What type of impact are you trying to make with this work?
- What decisions do you currently need to make?
- What are your next steps?
- How can the team support you?

Presenters should repeat back and write down what they learned from answering these questions. They may receive a lot of feedback during this ritual, but they don't have to decide how to integrate any of it until afterward. Presenters are responsible for following up on any action items that emerge from this ritual.

Repeat this process for each presenter.

4. Schedule who will present next

To end the ritual, identify who will present their work the next time you meet. Share a brief summary with the entire team of what work was reviewed and, if necessary, provide links to the work for other team members to reference if they weren't able to attend.

Routine Share Work in Recurring Meetings

Create a recurring meeting on your team's calendar for this ritual. In the meeting invitation, be sure to list who will be sharing work in the upcoming meeting, as well as the meeting structure and format for new or visiting attendees. Send a separate reminder email to presenters regarding how much time they have, so they will have the necessary materials prepared in advance.

Time to Decide

There's a moment in every one of the rituals we've discussed so far where the instructions say something like: "Decide as a team..." It's written casually, as if that's easy for everyone, everywhere. Decision-making just happens, unexplained and mysterious. *Just decide.*

But we all know it's not that easy. In fact, every team we've worked with has said that decision-making is the toughest part of working with others. It's such a significant issue that we dedicated the next five rituals to the decision-making process. Decide which ones your team needs the most.

This Decision Should Be Easier

Decision-making. Why is it so hard? *People*. People aren't always rational. Or good listeners. We struggle with other people's input on our work. And we can be conflict-averse. So we go around and around on decisions, both large and small. Consider these examples.

Frieda makes a major project decision over the weekend—and her teammates are not happy about it. Their next meeting is tense: She should have waited. There were better options. She'd cut them out. They want to change it.

Jeff and Lora keep debating how revising one tiny project detail could end up having huge consequences down the line. This single decision drags on for weeks, with the rest of the team waiting around for Jeff and Lora to figure it out. Before they know it, the project drifts into the danger zone.

In this chapter, we're going to share a series of rituals that provide your team with a traceable and repeatable process for making tough decisions together. These rituals will help your team reason their way to high-confidence decisions, and better debate and incorporate each other's input along the way. These rituals follow the same process:

1. **Focus the decision.** Identify exactly what your team is making a decision about.
2. **Establish your criteria.** Create shared standards that help your team to evaluate the available options.
3. **Generate enough options.** Agree as a team on what options you're going to decide between.
4. **Compare your options.** Identify the trade-offs between your options by considering them in relation to your decision-making criteria.
5. **Decide with confidence.** Use confidence voting with your team to decide on the best option, then communicate your decision to others.

Depending on how your team currently makes decisions, you may only need one or two of these rituals to see an immediate benefit. We recommend starting with "What Criteria Apply to Our Decision?" But we're beginning this chapter where most teams initially struggle: understanding exactly what decision needs to be made to advance their project.

RITUAL What Decision Are We Trying to Make?

"We need to make a decision." These words signal something important. You are asking your team to make a choice and move the project forward. That said, many of the decisions teams struggle with have little to do with the options currently available and more to do with how the decision is framed. A big decision can have hidden consequences.

In this ritual you'll gather your team's perspectives to determine exactly why you need to make a critical decision. You'll also decide who will be responsible for its outcome. This ritual is not about soliciting feedback or about how upset the team might be about previous decisions. It's about helping the team agree on what needs to be done to make a major decision happen.

1. Frame what decision needs to be made

Write the following questions in a location all of your team members can see:

- Why are we making this decision?
- How does this contribute to a better work product?
- Who or what is affected by this decision?
- Who is responsible for the outcome of this decision?
- When do we need to make this decision by?

Ask your team to write answers individually to the above questions.

2. Share your answers

Have each person on the team share their answers. If you're the facilitator, write each person's answers next to each question, so everyone on the team can see them.

3. Agree on your decision-making approach

Discuss your answers for each question. The goal is to agree on a single answer for each question. Take the time to discuss any significant discrepancies among the various answers.

4. Identify what success looks like

To complete this ritual, ask each person on the team to complete this statement: "This decision will be successful if…" Use the responses to set expectations with your team about what's needed to proceed.

Routine Solicit Input on Upcoming Team Decisions

Once your team is comfortable with this ritual, they can provide the same information in advance of initiating future team decisions.

RITUAL What Criteria Apply to Our Decision?

Criteria are standards by which something can be judged or decided. Your team needs to pick criteria to apply to your decision. Without criteria, you're just picking something based on opinions and feelings, which, we're here to tell you, isn't how business decisions are supposed to be made. This ritual will help your team generate criteria in advance of discussing options. This is a missing step for most teams, especially if they plan to make future decisions that require re-application of those standards.

There are two types of criteria: *yes/no* and *dynamic*. Let's introduce each of these before we go through the ritual.

Yes/no criteria are just that: Standards that are either true or false when you apply them to your decision-making options. For the purposes of your decision-making, yes/no criteria are etched in stone. The more of these constraints you have, the more focused your decision-making. Consider the following examples of yes/no criteria for the design and manufacture of a raincoat:

- Functional requirements: "The product solution must weigh less than 3 kilograms."

- Audience requirements: "The product must be usable by children ages 4 and up."
- Lifecycle of product: "The product must be made of recyclable materials."
- Budget: "Cost of manufacture must be less than $16 USD."

On the surface, each of these criteria may seem appropriate, but they can prove to be too general to be useful. Define what your criteria mean, and in what situations they will apply. For example: Your audience requirements could be more specific, with the solution applying to children ages 4 to 8 who live only in the United States and Canada. While yes/no criteria can help your team speed things along, most of the criteria that you'll use to evaluate your ideas or options will be dynamic in nature.

Dynamic criteria are standards that are relative based on the options you are considering. Each person on your team may have a different definition of those standards. When you hear team members say things like "This idea is better because it's more on brand" or "This option could be more easily monetized," they are using dynamic criteria to assert that one option may be better than another. These are some of the dynamic criteria we see used regularly with teams:

- Technical challenge to implement (low to high)
- Value to audience (low to high)
- Potential to monetize (low to high)
- Alignment with brand (low to high)
- Size of addressable market (small to large)

When you make a decision, your team members should list as many dynamic criteria that they believe are important for the team's

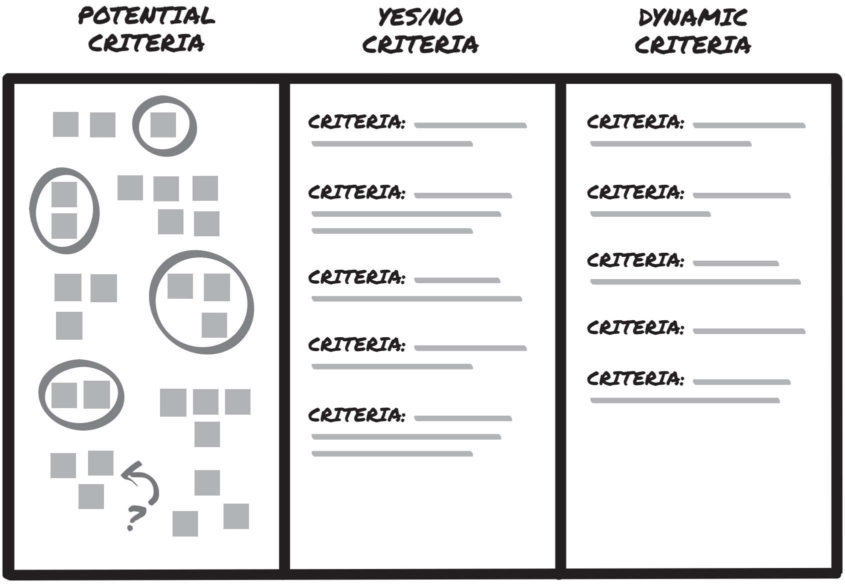


FIGURE 15 "What Criteria Apply to Our Decision?" example output

decision. Dynamic criteria are measured based on a scale of low to high or less to more. Your team will have to define what low or high might mean for the purposes of evaluating your options.

1. Individually create criteria

Set up this ritual's diagram in a location that all of your team members can see. Ask each person on your team to create criteria they think should be applied to the options you'll be considering. Have them write their answers on individual sticky notes.

2. Share your criteria

Ask each person to share their answers. After each team member is done, place their answers in the left column of the diagram.

3. Decide which criteria are relevant

From the list that the team generated, prioritize the criteria. The team can either stack-rank the criteria from most important to least important, or each member can silently mark with a star which three to five criteria they believe are important. The team will need just enough criteria to identify the trade-offs that matter most. The end goal of the discussion is to have at least three to five criteria to start working with.

4. Define yes/no and dynamic criteria

To complete this ritual, decide as a team whether your criteria are yes/no or dynamic, and place those sticky notes in the appropriate columns on the diagram. Ideally you should have criteria that are in each column. If you don't have any yes/no criteria, this will make your decision-making harder in the long term.

For yes/no criteria, write clear definitions of the criteria to use in your decision-making process.

For dynamic criteria, create provisional definitions for *high* and *low*.

For example, if your criteria is "potential to monetize," *high potential to monetize* may be defined as the ability to sell over $100,000 of raincoats, while *low potential to monetize* means that the option would lead to less than $10,000. Defining more abstract criteria, such as perceived value or brand alignment, may require your team to start looking at options and associating those criteria with specific examples.

When your team is done with this ritual, capture what you've created in a place that the team can easily reference as they go through the decision-making process.

Routine Create Quality Standards for the Team's Work

If you want better work from your team, you need your team to regularly redefine what *better* means and *what* needs to be better. *What we did isn't good enough.... We'll know it when we see it.... Our competitors are doing something better....* These types of excuses are easily overcome by maintaining quality standards as a team. Use this ritual with your team to ensure that yes/no standards for quality are consistently being met. Use dynamic criteria to enhance feedback and deepen your practice around rituals like "How Can We Improve Our Project Work?"

RITUAL What Are Our Options?

Options are the things that you're going to choose from when you make your decision. They might be ideas, features, aesthetic details, or technical attributes of the things your team is creating. By the time the team is making a decision on a series of options, they should be beyond the point of soliciting feedback or making revisions. This ritual will help your team identify which options they want to include in their decision-making process. This ritual is easy to conduct, although it can reveal personal attachments to particular options. We've seen many a pet project not make it through this ritual, much to the disappointment of the team member who brought it to life.

1. List options you want considered

Ask each person on your team to individually write down what options should be considered. Have them write their answers on individual sticky notes.

2. Share your options

Ask each person to share the options they want to include. Place them in a location that everyone can see.

3. Decide which options to include

Discuss which options your team thinks are most important to decide between. The team can either stack-rank the options from most important to least important, or each member can silently mark with a star the options they believe are most important to include. When making a critical decision with this ritual, you need at least five options to clarify trade-offs. If you're early in a project and still thinking about potential paths to take, you should be creating and considering a lot more.

Don't fall into the trap of having two options. If you're asking "Are we going to do this one option or not?" your team isn't really making a decision. Alternatively, don't be afraid of leaving in the "bad ideas," as long as you aren't including them to force your team into picking the only option deemed "good."

4. Make each option equal fidelity

To complete this ritual, look at the options you've selected as a team and make sure they're at equal fidelity before proceeding. By *fidelity*, we mean that each of your options has been represented in the same way. For example: All of your ideas under consideration are presented as words and sketches on sticky notes. Or the project plans you're deciding between are represented as one-page summaries that have the same format. By doing this, your team can evaluate your options more fairly, and trade-offs between them will be apparent.

Capture the output of this ritual in a place where all team members can access it, and refer to it as you continue through the decision-making process.

RITUAL What Are the Trade-Offs?

This ritual will help your team evaluate the options you're considering against the criteria that you've generated. This is possibly the most challenging moment in the decision-making process, and we encourage teams to use 2×2 diagrams to help them visualize trade-offs between their options. We find that trade-offs become more apparent when using at least two of these diagrams. For more on the 2×2 diagram, see *The Power of the 2×2 Matrix: Using 2×2 Thinking to Solve Business Problems and Make Better Decisions* by Alex Lowy and Phil Hood.

To prepare for this ritual, work through "What Criteria Apply to Our Decision?" with your team, and have all of your options written down on individual sticky notes or small sheets of paper. If you have to do this ritual digitally due to your team being remote, avoid spreadsheets or other fixed-grid documents. Team members need to be able to move each option around.

1. Decide which criteria to use

Set up two 2×2 diagrams in a location that all of your team members can see. Then look at the list of dynamic criteria generated in the previous ritual. Ask each of your teammates to individually vote for the criteria they believe should be used in this ritual.

Discuss which criteria would lead to the best understanding of trade-offs between your options. Write those criteria on the x- and y-axes of your 2×2 diagrams. They should look like the example output in Figure 16.

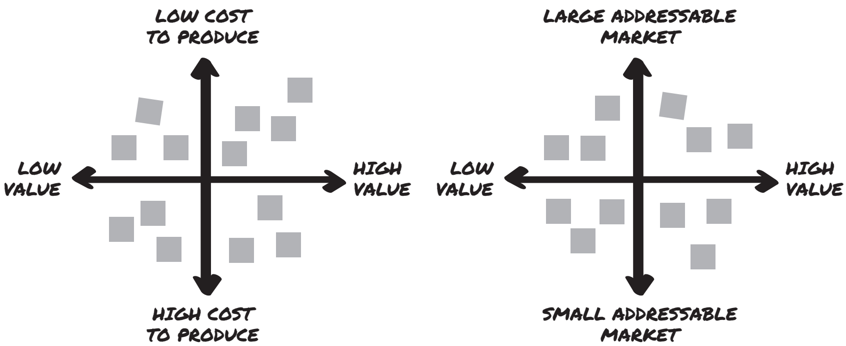


FIGURE 16 "What Are the Trade-Offs?" example output

2. Place your options on a 2x2 diagram

Have your team stand in front of one of the 2×2 diagrams. If you're facilitating the ritual, pick one of the options, hold it up, and ask, "Where do you think this option belongs?" Your team members will share opinions on where each option should be placed on the diagram. If no one shares an opinion about an option, provoke a response by placing the option at a random place on the diagram and asking: "Is this where it should go?"

This ritual quickly reveals your team's shared understanding of the available options and the criteria you're using. Have a teammate write down what you're learning as you go, so there's a record of how the team understands the options and criteria.

After you've mapped all of the options on one 2×2 diagram, take a photograph of the arrangement.

3. Adjust your options and criteria

Discuss what you've learned so far and whether you should make any adjustments to your options or criteria.

Look at the 2×2 diagram you've mapped your options onto. Are

Scoring Systems Don't Decide for You

We've had a lot of teams ask us, "Can't we just use a scoring system for all of this?" Short answer? No.

Longer answer? No, and here's why. A scoring system creates a few efficiencies for how to apply dynamic criteria to options. For example, a team may say that each criteria will be scored from 1 point if it's ranked low, all the way to 5 points if it's deemed high. It seems like a good way to keep track of how your options stack up. But scoring systems set up false equivalency between criteria, and then teams just pick whatever has the highest score, claiming it's the best decision.

One criteria may matter more to the team than others under consideration, and any scoring system can be manipulated. The actual numbers matter less than the reasons why team members chose them. Those reasons are what you should consider when making your final decision.

there areas where options don't appear? Only one or two options in one quadrant? Your team may choose to change the existing options or add new options based on where there are empty spots, if they point to gaps in your thinking.

At this point you may have discovered additional criteria. Discuss with the team if the new criteria is essential to include, and if so, what 2×2 diagram you will incorporate it into.

When discussing the criteria, evaluate whether you should reprioritize those that should be used on the next 2×2 diagram.

4. Place your options on another 2x2 diagram

Pull down your options from the first 2×2 diagram, then go through the mapping and adjustment process with the team again. Continue this process until the team believes they have learned enough to make a decision with high confidence.

Capture what you learn from this ritual in a place that the team can refer to, as this information is invaluable when communicating the rationale behind your decision to stakeholders.

Routine Use 2x2 Diagrams for Everyday Decisions

Once your team is comfortable with this ritual, they can quickly construct 2×2 diagrams for use in regular project decision-making. This routine is most beneficial when the team is struggling to understand the trade-offs of a downstream decision, or when they are at an impasse and can't agree on the best course of action.

RITUAL Which Option Are We Most Confident About?

This is it. You're going to make the decision. And this is where all of the bad habits come out: "I like Option C. Let's go with that." "No way. Option D. It's so much cooler." That's not deciding. That's convincing others to agree with you.

In these situations don't vote with *yes* or *no* for each choice. Don't prioritize your top picks. Don't stack-rank options from best to worst. There are pros and cons to each of these approaches, but we've developed a way that reduces bias and increases team alignment about why a particular option is the best decision.

Your team needs to be *confident* about the selected option, to be able to clearly explain to others across your organization why that option is the best choice. During this ritual your team will agree to a particular course of action through confidence voting.

To prepare for this ritual, put the options you're considering in a place where everyone can see them. It helps to have each option on its own sheet of paper, so you can write notes on it during the ritual.

1. Create confidence votes for each option

Ask each person to write down their confidence votes for each option the team is deciding between. Confidence votes are a percentage from 0% to 100%. A vote of highest confidence is 100%. This means, based on what the team has discussed, this particular option will lead to the best possible outcome. A vote of no confidence is 0%. This means that all the information you have leads you to believe this option will lead to the worst possible outcome for the project. To repeat: This isn't *best idea* and *worst idea*. Confidence voting is about expressing the relationship between *option* and *outcome*.

Your teammates should come up with one vote per option and write their votes on individual sticky notes. Make sure team members don't see each other's numbers.

When you're voting, you may be referring to how your options fared in previous rituals. Team members may say things like: "Option B scored high on all its dynamic criteria…that means it's a 100% confidence vote, right?" Not necessarily. Remember: Criteria doesn't make the decision for your team, it just informs your team about trade-offs.

2. Share your confidence votes

Ask the team to stand in front of the options and find the sticky note with their vote for the first option on the wall. Count down for the team: "3…2…1…Vote!" When you say *Vote!,* everyone places their sticky note with their vote on its associated option. Everyone votes at the same time.

Look at the numbers other people chose. At this point some teams like to discuss their numbers before sharing their votes on the other options. Others like to wait until they've voted on all of the options, then go back and discuss. What's important here is to make sure you understand why each person chose their confidence number. This is especially powerful when senior stakeholders are participating in your decision-making process. Instead of stakeholders saying things like "I don't want us to do any of these options," the ritual invites them to say, "My confidence is low on these options for the following reasons . . ."

After everyone has shared the rationale behind their votes, team members can adjust their votes before proceeding. Just have them cross out the numbers on their sticky notes and write in new ones.

3. Tally your votes

Add up the percentages from each vote, providing the appropriate weighting or averaging based on who contributed to the vote. For example, whoever is responsible for the decision, or is an executive stakeholder, may be given more weight in the final decision. (We don't like it when that happens, and we discourage seniority weighting when we can, but it's an unavoidable reality for many of the teams we work with.)

At this point the team should discuss what level of confidence is needed to move forward with a decision. Don't do this at the start, or you risk team members gaming the process. There should be at least one or two decisions that have fared better than others, and prove acceptable to the team.

However, in some situations the team might need to negotiate. Imagine that your team believes they need at least 70% confidence in an option before moving forward. One option is at 70% for everyone, except for one team member who is at 50%. Ask that team member what would need to change so that they could reach 70%. Address this feedback in the project plan. This helps everyone feel that their concerns have been heard. Sometimes this little negotiation is all it takes to move the team to acceptance.

4. Share a summary of your vote

After you've completed the confidence vote, write a concise, simple summary of the decision. It should contain the following information:

- The decision the team made
- The number of options that were considered
- The criteria that were most important when evaluating options
- The team's level of confidence in the option that you chose
- The plan for what the team will do next

This isn't just something to share with your stakeholders so they'll know where your team is headed. In reading the summary, everyone on your team should feel like they had input. Even if they didn't get what they wanted in the end, everyone on the team should understand why the decision was made and how the entire team will support it.

Routine Use Confidence Voting for Everyday Team Decisions

Once your team masters this ritual, they can apply it at many points throughout projects. Use confidence voting with the other rituals in this book, when struggling with tough project decisions, and to help with general workplace decisions that end up being deceptively challenging—such as agreeing on where the next holiday party should be held.

Routine Revisit Your Confidence Vote If Circumstances Change

There is no perfect decision. There is only the best decision that your team can make at a particular time, with a clear understanding of the trade-offs that existed at that moment. For decisions made in dynamic circumstances, your team may need to repeat this ritual to determine whether your confidence has shifted.

We've Got It, Let's Go!

You've decided. Now for the nerve-wracking part: seeing if your team's idea is actually going to work. And if it does, oh boy, is it going to be awesome. It's going to change the lives of millions of people all over the world. Or maybe it's just going to change *your* life. Regardless of the scope of your project, your team might want to run a few tests first, just to make sure you're doing what you set out to do.

Putting Our Ideas to the Test

This idea is going to work. Something's broken on our team, and we've got Just the Right Thing to fix it. We know it.

But that's idealism talking. Ideas don't fix problems. *People* do. But people are also the ones contributing to the problems, remember? We're dealing with the complexity of human beings in all of their beautiful and stubborn glory. So your fantastic idea may lead to reactions you hadn't intended.

You'll need to be more experimental about it. Flash back to learning about chemistry in school. Donning rubber gloves and safety goggles, you mixed caustic liquids in a beaker dangling over a hot flame, trying to prove a basic hypothesis about what happens when you mix elements. Then the entire mixture frothed all over the tabletop, destroying your binder and spilling onto your favorite pair of sneakers.

Yes, experiments are the basis of how we apply the scientific method. However, experimenting with change on your team is more volatile than you might think, because your team members are both designing the experiment and participating in it.

In this chapter we'll share rituals that will help you best leverage the process of experimentation. They will help you responsibly test versions of your team's ideas, learn what's working, and make adjustments over time to reach desired outcomes.

RITUAL What Do We Think Will Fix This Problem?

Your team knows what the problem looks like, as well as its probable root cause. Now the team can come up with testable ideas to fix that problem. Here's a two-part ritual to help you harness the best ideas and insights from everyone on the team, using future states to thoroughly explore the problem.

Using the Five Whys? Start with the Five Not-Whys

We would be remiss if we didn't bring up the Five Whys at this point. This is a popular ritual for teams trying to identify root causes of workplace issues. The Five Whys was created at Toyota by Taiichi Ohno, and its benefits as part of the Toyota Production System have been documented in hundreds of books and articles.

In the Five Whys ritual, team members identify a problem or issue, then ask why it happened. They answer that first why, then ask the question "Why?" again in relation to that answer. This process of questioning and answering continues until the team believes they've identified the root cause for that issue. (Hence the name of the ritual—it's rare that the root cause begins to reveal itself until you ask the third or fourth why.)

In practice, however, we've seen many teams struggle with this ritual when trying to identify complex workplace issues. The point of the ritual is to uncover the facts of exactly what led to the problem. But the larger the team, the more perspectives the team needs to manage in order to determine those facts. If you choose to use the Five Whys with your team, we recommend that they warm up by using what we call the Five Not-Whys.

(continued)

1. Divide into groups to explore outcomes

Set up this ritual's first diagram in a location that all of your team members can see. Review the root causes to the problem the team has identified. Then split your team into two equal-sized groups and give each group some sticky notes. We recommend sticky notes for this ritual in particular, due to the amount of reorganizing you may need to do.

The first group's task is to imagine a future state in which this problem is fully resolved. What will happen in this future state?

(continued from previous page)

Ask each team member to individually and silently write what events they believe led to the specific problem or issue they're trying to fix. The description should not include the potential causes of the issue, only the following:

- What particular event happened that let everyone know there was an issue?
- Who participated in the event or contributed to it happening?
- When did the event happen?
- Where did the event happen?
- How did it happen?

When everyone is finished writing this down, ask each team member to share what they wrote. It's likely that each person will describe the situation a bit differently. Agree on which events did (or didn't) happen, then use this information as a way to improve the results of the Five Whys and the rituals in this part of the book.

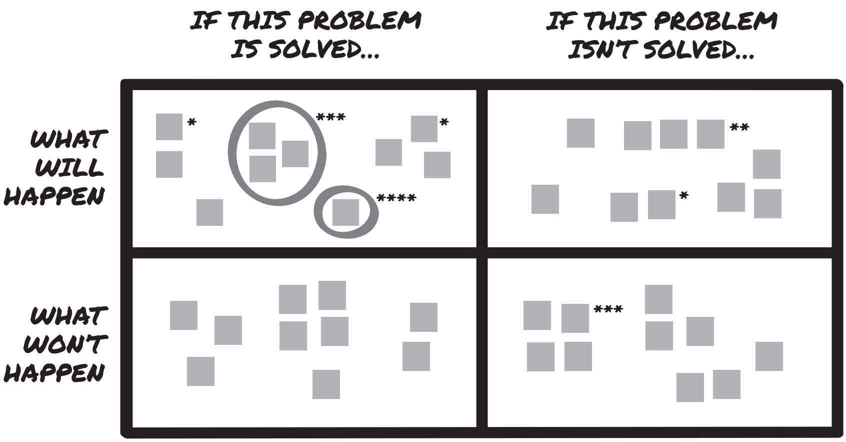


FIGURE 17 "What Do We Think Will Fix This Problem?" example output for the first half of the ritual

What won't? Ask the group to be as specific as possible about what this future state will look like. Put this information in the left column of the diagram. The second group's task is to imagine a future state in which the problem is not solved. What will happen? What won't? This future state will help everyone on the team recognize risk factors or other considerations that may need to be addressed. Put this information in the right column.

2. Share each group's thinking

Ask each group to share what they created. Team members are free to add more items to both of the columns.

3. Select an ideal future state

Discuss the items listed in the left column. Which are most desirable? Which are most achievable? Mark the ones that the team believes are critical to reach. These items will be carried forward into the second half of this ritual.

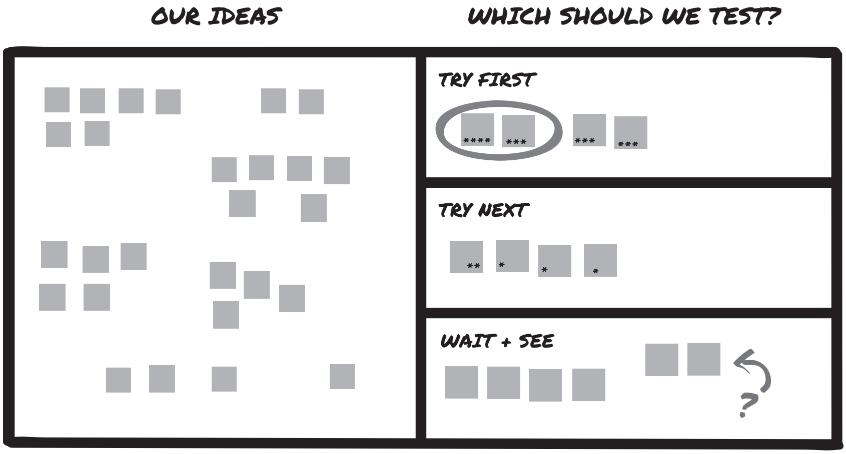


FIGURE 18 “What Do We Think Will Fix This Problem?” example output for the second half of the ritual

Don’t forget the right column. From this column, have the team mark the items they believe are most important to keep in mind during testing. A future state in which the problem isn’t solved may not be filled with negative things. The items in this column may reveal important considerations about customers and competitors, and even allow your team to temper aspects of their solutions to prevent future harm.

4. Generate potential solutions

Set up this ritual’s second diagram in a location that all of your team members can see. Ask your teammates to individually generate ideas that they think may lead to the outcomes you’ve selected. Make sure these are captured at equal fidelity, one idea per sticky note. As a stretch goal, see if each team member can generate at least ten ideas before proceeding.

5. Share your ideas

Ask each team member to share their ideas. Giving equal time here is important, as some team members may be tempted to overexplain their ideas, which biases the team. As each team member shares, place their ideas in the left column of the diagram.

6. Identify which ideas to try

As a team, debate which ideas to try first, and place them in the right column in the appropriate rows. Select just a few ideas to try as a team. If the problem that came up was small, the team may be able to fix it right away with one of their ideas. Larger, more complex issues may require testing a number of ideas.

If you're overwhelmed by the number of ideas to consider, use a 2×2 diagram with the following criteria: time to implement and effect on problem. You can also use confidence voting when you've narrowed down the ideas under consideration to a more manageable number. If you haven't used these rituals yet, see the previous chapter.

At the end of this ritual, write down the future state the team is trying to achieve, the ideas that your team will be testing, and the reasons why the team chose them. The next ritual will help you in planning the test.

Routine Generate Ideas to Address Other Problems

Once your team is comfortable with using this problem-solving approach for team-related challenges, it can be applied to issues that come up for customers or clients in the project work itself. This is also a good opportunity for clients to think deeply about how particular ideas lead to different future states.

RITUAL What's Our Hypothesis for This Change?

A hypothesis is the beating heart of any well-designed experiment. Hypotheses help you evaluate whether your ideas will create the outcomes you'd intended. Strong hypotheses are clear and focused, and can be proven true or false based on the evidence that you gather through an experiment. Proving something true always looks good, but actively trying to disprove hypotheses can help the team avoid confirmation bias.

The following ritual, adapted from Jason Little's work in *Lean Change Management,* will help your team determine exactly what it will take to translate an idea into a measurable experiment. All that you'll need to get started is an idea that the team is prepared to test.

1. Create hypothesis statements

Ask the team to review the idea that you'd like to test, and the reasons why the team would like to try it out. Then ask each person on the team to individually write a hypothesis statement regarding

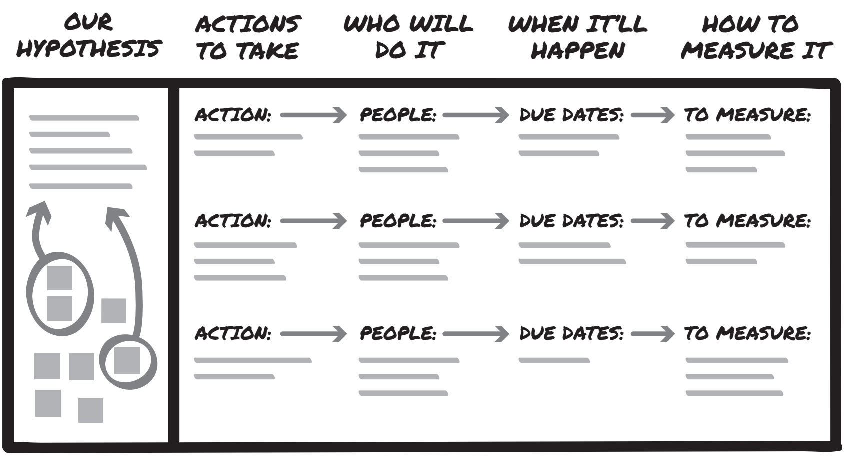


FIGURE 19 "What's Our Hypothesis for This Change?" example output

what the team can prove or disprove by implementing this idea. Use the following format for the hypothesis:

> We hypothesize that by implementing <**this idea**>
> we will solve <**this problem**>,
> which will have <**these benefits**>
> as measured by <**this measurement**>.

We'll break down each of these items in the hypothesis statement, so it's clear what the team needs to create:

- **This idea** is the description of the idea the team has agreed to move forward with.
- **This problem** is the root-cause issue that you've identified with your team.
- **These benefits** are what the idea will create, in terms of a potential future-state solution to the problem. Be as specific as you can.
- **This measurement** is a change in behavior that your team will see as a result of the idea being put into action. If you can't measure what's changed, qualitatively or quantitatively, how will you know it changed? How will you communicate the results of that change to others?

Ask team members to write each of their hypotheses on individual sticky notes.

2. Share hypothesis statements

Set up this ritual's diagram in a location that all of your team members can see. Ask each person to share their hypothesis. After each team member is done, place all of the hypotheses in the left column of the diagram.

3. Decide which hypothesis to test

Discuss the hypotheses and debate which one the team wants to test first. You may need to mix and match contents of multiple hypotheses to create one that the team finds acceptable. If this proves challenging, use some of the facilitation approaches from "What Problem Are We Trying to Solve?" to generate each section of the hypothesis.

By the end of this step, the team should have a clear hypothesis statement at the top of the left column in the diagram.

4. List what's needed to run a test

Ask your team members to list the activities they believe are necessary to put the first version of your idea into action. Teams frequently overlook preliminary work when testing, so take your time with this list. If you're going to measure a potential change, for example, you'll need a baseline measurement for comparison, which will take additional time to gather and report. List those actions in the appropriate column in the diagram, as well as the people responsible for those actions and when they are due.

It can be tempting to use this part of the ritual to spend hours thinking through how you could run an experiment. Resist that urge. Ask your team: "What are the minimum number of actions we need to take to start learning?"

5. Identify success measures

Consider what measurements your team will need to gather to make sure they're creating the change they had intended. There are multiple ways to collect this feedback, but no matter what you choose, make sure your team's perspectives and needs are taken into account throughout. Place this measurement information in the last column of the diagram.

To complete this ritual, review the output of the ritual. Teams can only bear so much change at any time, so make sure to prioritize your action items accordingly. Everyone on your team should have clear expectations about what to do next.

Communicate to your stakeholders or other teams what you are testing, so they can be informed and involved as needed. No one likes to be experimented on without their knowledge.

Routine Learn through Iteration with Your Team

Based on what your team learns from testing your hypothesis, you'll know if you were correct (or not) and can adjust accordingly. Plan for regular check-ins with your team to communicate the results of your experiments. In those meetings, restate your hypothesis, look at the data you're measuring, and see if your hypothesis was proven false. Then revise your hypothesis and begin new tests as needed.

Routine Celebrate What You're Learning

You know your team is growing if they're testing hypotheses intentionally, seeing what's working, and fixing what isn't. Celebrate iteration as a behavior. If you don't allow time for experimentation, the team may never fully address the problems they're trying to fix.

Routine Identify Hypotheses for Ideas on Project Work

Team members can use this ritual to break down and clarify ideas used more generally in their project work. Any time a team member proposes a new idea, the team can immediately ask for a relevant hypothesis. Over time, people on the team will develop the habit of bringing hypotheses to the team first, rather than ideas.

RITUAL What's the Impact of This Change?

Ideas can have unintended consequences. One tiny adjustment could help improve how everyone works, or it could upend the entire system. This ritual will help your team identify some of these potential effects, both positive and negative. We recommend doing this ritual when your team is planning a high-stakes experiment. Use what you learn from this ritual to update the plan you created in the ritual "What's Our Hypothesis for This Change?" This ritual is one of our adaptations of the "Ripple Effect" activity in frog's *Collective Action Toolkit*.

1. List your idea's impact

Set up this ritual's diagram in a location that all of your team members can see. Ask the team to review the idea you'd like to test and

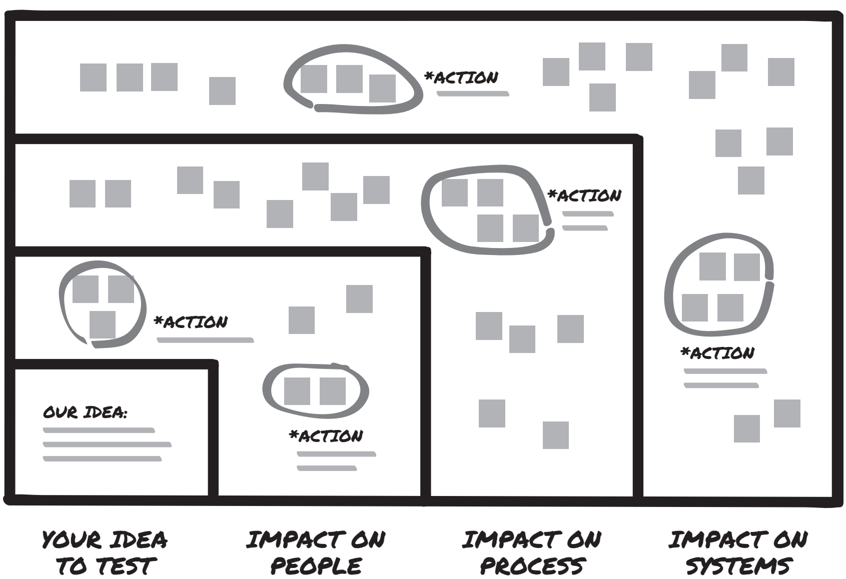


FIGURE 20 "What's the Impact of This Change?" example output

place it in the bottom left of the diagram. Ask everyone to individually write down how they think the idea might impact the people, processes, or systems at your organization. Here's what we mean by each of the areas in the diagram:

- **People.** This refers to all of the people and departments in your organization that may be impacted by your idea. Team members should write on individual sticky notes the names of those people or departments, as well as how they may experience the impact of your idea. Depending on your experiment, the team may need to include people outside your organization who will feel your idea's influence. Don't forget to include your own team in this list. There may be changes to how you do your jobs that would need to be part of the experiment.
- **Process.** This refers to how people in your organization get work done. List on individual sticky notes what changes in process may be required when your idea is implemented. Be sure to include processes that will no longer be needed; winding down established processes can take a significant amount of time and resources.
- **Systems.** These are the digital tools, software, and infrastructure that help people in your organization do their work. List on individual sticky notes what systems may be utilized or changed in the process of testing your idea. Remember to include any existing system that will be eliminated due to the change.

You can have team members or stakeholders work through this step of the ritual on their own. Be sure to include this as input for your team.

2. Share what you've created

Ask each team member to share. After each person is done, they can put their sticky notes in the diagram in the appropriate areas.

3. Decide how to address effects

Discuss each area. Are there people, processes, or systems that you didn't realize your idea would affect? What should the team do as a result of what you've learned? Create the appropriate action items for your team, so they can ease any unintended consequences before their experiment begins.

Routine Assess Impact Outside of Your Organization

When your team is comfortable with this ritual, they can use it to consider the impact of ideas you'd like to test on people outside of your organization. This includes customers, clients, and competitors. Simply adjust the labels at the bottom of the diagram as needed.

Can You Feel It?

You're running your tests, proving your hypotheses, and finally getting some traction on some great ideas. Before you know it, you'll be entering the home stretch. The rituals included in the final part of this book will help your team keep going strong through the final phases of a project, and determine how they want to communicate their results to others.

PART 3
SPRINTING TO THE FINISH

Actions speak louder than words. And right now, your team is all about action.

Everyone on your team has headphones on, cranking out work. When dinner rolls around, someone orders in burgers, wings, and noodles, providing the perfect combination of calories, salt, and spice. Everyone eats quietly, relishing the pause before getting back to work. The list of tasks grows longer and longer, as your deadline inches closer and closer. Eventually things will slow down, but right now your team can only think about finishing. Anything else is a distraction—even the things that everyone on the team knows they have to address.

Joanne and Ling are angry at each other because they had to redo each other's work. Maybe we'll talk about that next week. Until then, no one wants to touch it.

Your team had a lackluster presentation because Tim forgot to invite all of the stakeholders. And Sunil didn't have enough time to prepare. Tough.

Issues like these are critically important. They need to be addressed. But when teams are so focused on delivery, we can end up ruining what made the team work so well together in the first place.

In this part of the book, we'll share a series of rituals that help teams maintain their cohesion when they're sprinting to the finish on their project work. These rituals work well when completing an important milestone with your team, such as a key project deliverable. These rituals will help teams reflect on what they've learned, communicate the impact of their work to stakeholders, and create closure as their projects wrap up.

Reflecting as a Team

We learn a lot when we're working on teams—what we want, what we don't want, how to adapt and succeed. But we rarely share these insights with others, and teams never seem to have enough time for reflection as a group. When they do, it's usually because things went wrong. And in our rush to fix things, we often end up breaking what's going right.

This is understandable. After all, we're at work, and reflection sometimes feels too personal, too intimate. We've heard from some teams that, at their company, reflection just means "sitting around and talking." Reflection isn't productive.

But that isn't true. Productivity is equal parts doing what we said we'd do and reflecting on the most efficient and effective ways to get those things done. Teams can only improve if they take time for reflection, then fold what they've learned back into their process and projects.

The following rituals help teams reflect on their project experiences, no matter whether they are midproject or edging toward the big finish. Team members can use these rituals to create a space for sharing perspectives and feedback, whether things are going well or not. These rituals are often used by organizations that work on Agile or Scrum software development teams. You might hear them called "retrospectives" or "retros." Whatever their name, these rituals can help any team that wants to develop a habit of reflection. As such, we have adapted them for use with any project-oriented team.

RITUAL What Should We Change?

The following ritual will help team members share what they've learned so far in working together, then identify ways to improve their working processes. This ritual is best conducted while a project is midflight. For this ritual, it's best to only include core team members and not executive stakeholders. Once your team feels comfortable consistently sharing their reflections, they can carry this behavior into other team interactions where open dialogue and debate are necessary.

The first few times you do this ritual, your team will probably bring up a few long-simmering issues. These issues can be anything from past misunderstandings to mismatched role expectations. These issues are important to discuss, keeping in mind that this ritual is not for casually venting or blaming others.

1. Reflect on what worked and what didn't work

Set up this ritual's diagram in a location that all of your team members can see. Ask each person on the team to individually reflect on the following:

- **What worked well.** This could be anything from the team's working process, to how team members are communicating or collaborating, to how the team is interacting with their

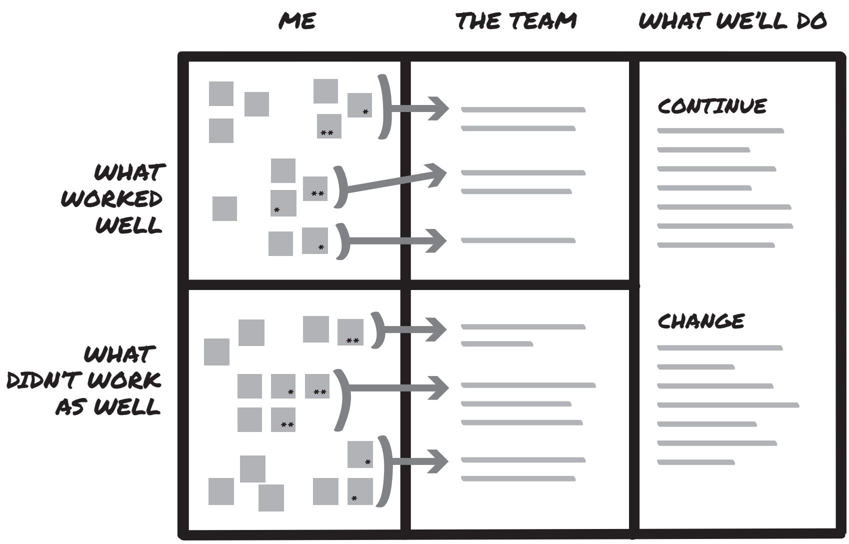


FIGURE 21 "What Should We Change?" example output

stakeholders. The team wants to preserve these things, even as they attempt to make improvements.

- **What didn't work as well.** These are pain points or issues that your team members observed, and believe are relevant for the team to discuss as a whole.

After each team member has had a chance to think, have them write their perspectives down, ideally one piece of information per sticky note. If you are pressed for time, team members can prepare this information in advance of the ritual.

2. Share your observations

Ask each team member to share. As a reminder, give everyone equal time, especially during reflections. Then put their sticky notes on the whiteboard in the left column of the diagram.

3. Decide what items to address

Discuss with the team the items listed in the left column. Which should be continued? Which are things that aren't going well, that the team believes they should address? If there are a lot of items to choose from, let your team stack-rank or silently mark with a star the items they want to address. Move those items to the middle column of the diagram.

4. Create ideas for changes to try

Focus on the items in the middle column. Ask your team to generate ideas for how to support what's working and make changes to ease pain points. You may need to do additional analysis as a team to identify the causes of those issues before you can create ideas.

Decide which ideas the team should try in the coming weeks. List those in the right column.

To complete this ritual, ask team members to sign up for action items, or determine a way to assign them if necessary. In terms of output for this ritual, we recommend documenting only what's in the right column of the diagram. It helps individuals maintain their privacy while allowing the team to speak with a unified voice.

In a few weeks plan to review progress with your team regarding how the changes went and if any additional changes need to be made.

Routine Reflect on What the Team Is Learning

Ask your team to repeat this ritual every few weeks as a follow-up activity, so they can see how suggested changes have worked for the team and if they need to make any adjustments.

Routine Start Projects with an Expectation to Do This Ritual

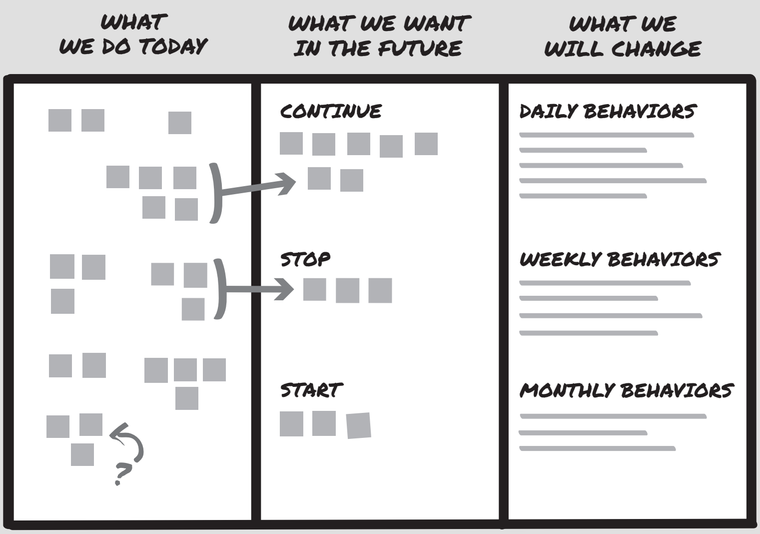
Introduce this ritual at the start of your project as a planned activity after each milestone or sprint.

Routine Create a Cheat Sheet for Your Next Team

When completing a project, do a variant of this ritual that helps team members answer the question: "If we could start this project over, what would we do differently as a team?" Change what's in the left column of the diagram to the categories "Keep the Same" and

Use This Ritual to Check in on Values, Behaviors, and Habits

If you've already conducted the rituals "What Do We Value As a Team?" or "What Habits Do We Want As a Team?" from the first part of this book, consider adapting this ritual. Use the following diagram and ask your team members to reflect on what behaviors and habits they want to continue, stop, or start.



"What Should We Change?" example output based on rituals from Part 1

"Do Differently." Consider this a cheat sheet that team members can carry into their next projects, including what specific rituals or routines they would like to propose trying with new teams.

Creating a Culture of Team Forgiveness

Making mistakes isn't what screws up a team. It's how we respond to them that makes all the difference.

Problems on your team *will* happen. Mistakes occur all the time, both in the work we're doing and in how we work together. This isn't an exception to the rule—it's how we learn in life. We perceive a gap between what we're trying to accomplish and what we're able to realize through our work. Once those gaps become visible, we have to decide how to deal with them. After all, we're responsible for their consequences.

Mistakes are often seen by teams as failures. But failure isn't a bad thing. Not being able to learn and recover from failure is a bad thing. Teams don't like to say they failed at something during projects, because it forms perceptions that they're going to botch their projects.

When we label something we did on the team as a failure, we have to start by forgiving ourselves and each other for what happened. If you can't forgive team members for what happened, you may not have the clarity of mind to really understand what went wrong. We first heard this sentiment from design leader Steve "Buzz" Pearce: "You can't have a culture of accountability without a culture of forgiveness."

Forgiveness doesn't mean there are no consequences for your actions. It means you accept them. If your team is taking accountability for a failure, you're addressing what happened, showing your clarity of thinking in how it came about, and doing your best to keep it from happening again. Finger-pointing or blame should not slip into how you describe the current situation and what you're going to do to address it.

RITUAL What Were the Ups and Downs?

Some projects feel like a rollercoaster, full of surprising events and emotional ups and downs. While some of those events seemed thrilling for much of the team, we may not realize that a few people ended up feeling sick. For instance, an accidentally deleted file is a nuisance to one person and an absolute heartbreak to another. When we reflect on what happened over the course of a project, it can be difficult to share our own perceptions and feelings about those events. It's rare for teams to take this information into account when considering how to make changes in how the team works.

In this ritual your team will reflect on what happened over the course of a project, identify where the team had different perceptions of what went well and what didn't, and clarify the emotional responses your teammates had to those situations. When the team is done with this ritual, everyone will have a better shared understanding of what happened on the project and be able to address any disagreements that happened along the way.

This ritual can be a relevant input into the previous ritual or an input into identifying root-cause issues. The ritual is also referred to as an Emotional Seismograph, Peaks and Valleys, or an Experience Map. Below is our adaptation of it.

1. Draw your ups and downs

Have your team members get a sheet of paper and a pencil. Ask them to draw the basic diagram shown in Figure 22, with a line from left to right that represents time, and a vertical line on the left that relates to how you felt during the project. While the example we've provided includes "more happy" and "less happy" on the vertical line, your team can use any labels that are relevant to them, such as "more confident" and "less confident" or "more productive" and "less productive." This is the starting diagram for the ritual.

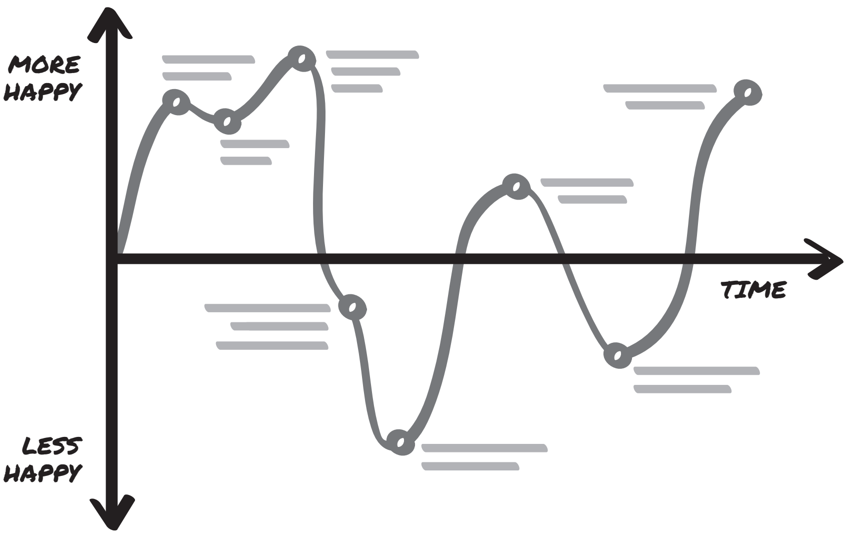


FIGURE 22 “What Were the Ups and Downs?” example output

Now ask each team member to draw a line from left to right that represents the ups and downs of how they personally felt during the project. Have them label each of the ups and downs with the specifics of each event and any insights they want to provide around their feelings during that event. Although each person’s ups and downs will be unique to their experience, the annotation of the events should look similar to the example output shown here.

2. Share your ups and downs

Ask each person to share what they created with their teammates.

3. Decide which items to address

Discuss where the team had similar emotional responses to specific situations. Then focus on areas where the team had different emo-

Variant: Draw Each Person's Experience on the Same Diagram

As a variant of this step, you can ask each of your teammates to take turns redrawing their ups and downs on a whiteboard, explaining key events they felt over time. As each person shares their experiences, the team will immediately see where team members had similar or different emotional responses. Make sure that everyone has a chance to draw their diagram on paper first, so that the first person at the whiteboard doesn't bias others.

tional reactions to situations that came up during the project. Write these things down in a place everyone can see. Consider using the diagram from "What Should We Change?" to help organize the team's discussion.

4. Explore which changes to try

Based on what you know now, what behaviors should your team keep? What could your team have done differently? Ask team members to generate ideas of what they want to change moving forward. Then decide which ideas, ranked by priority, the team will try in the coming weeks.

To complete this ritual, share a list of these ideas with team members and ask them to sign up for action items.

Routine Reflect Regularly on What the Team Is Learning

Ask your team to repeat this ritual in a few weeks as a follow-up activity.

Routine Start Projects with an Expectation to Do This Ritual

Introduce this ritual at the start of your project as a planned activity after each milestone or sprint.

RITUAL What Can We Not Change?

At the start of a project, it seems like anything's possible. But when you're trying to complete a project, your team might realize that some of the problems they're trying to deal with can't be solved. This usually happens when a team is struggling with some form of debt: technical debt in how your products or services are set up, lack of budget, stakeholder expectations that are unreasonable, or too few people to get all the work done. These constraints might be insurmountable.

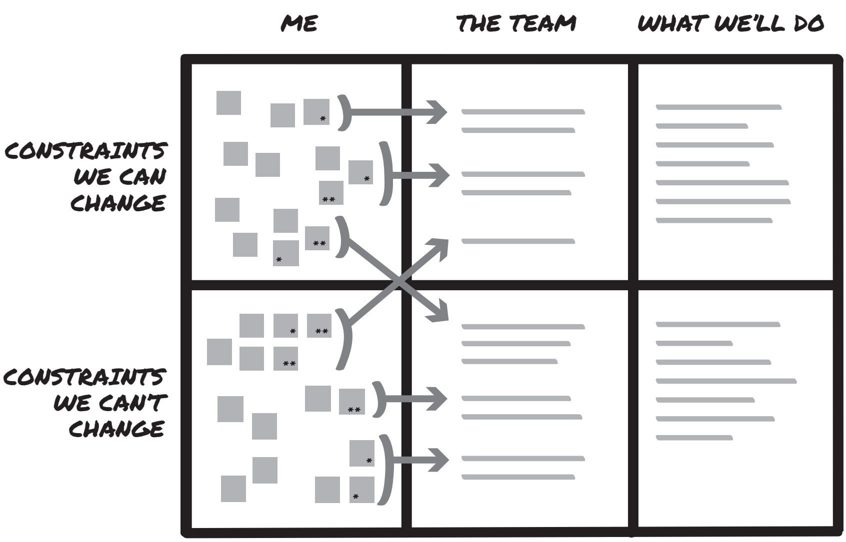


FIGURE 23 "What Can We Not Change?" example output

This ritual will help your team have a structured conversation about what they would like to change but may not have the agency to do so. One outcome of this ritual is your team acknowledging which constraints they can't change, and as a result of that recognition, how team members will support each other throughout the duration of the project. This ritual works well after "What Should We Change?"

1. List project constraints

Set up this ritual's diagram in a location that all of your team members can see. Ask each person on the team to individually reflect on what constraints the team is working within. These constraints may fall into one of the following categories:

- **Technical debt.** Your team may be working with legacy code or systems that would require substantial effort to fix.
- **Financial debt.** Your team or organization may have severe budgetary limitations.
- **Staffing.** Your team may be lacking critical roles or skills that are required to carry out project duties.
- **Material resources.** Your team may not have access to the necessary physical materials to carry out the work.
- **Legal regulations.** Your team may be working within legal constraints that will not allow for actions that you believe are necessary for project success.
- **Cultural norms of behavior.** Certain behaviors required for project success are not rewarded within your organizational culture.

- **Unrealistic expectations.** The project was set up with outcomes that the team doesn't believe they can achieve.

Team members should place each constraint on an individual sticky note. If you are pressed for time, team members can prepare this information in advance of the ritual.

2. Share project constraints

Ask each person to share what they've written. Put their sticky notes in the left column of the diagram in the appropriate row.

3. Decide what constraints can change

Discuss the items in the left column. Which constraints can the team change? Which can they not change? Place those items in the middle column in the appropriate row.

4. Explore what changes to try

Generate ideas for what you'd like to try to change, based on what you placed in the top box of the middle column. Decide which items, ranked by priority, the team should try in the coming weeks. Then ask the team to generate ideas for what they would like to do to support each other as they deal with the consequences of the constraints they can't change. Like before, decide which items the team should try.

To complete this ritual, ask team members to sign up for action items or, if necessary, assign them to people or groups.

Routine Address Situations in Which the Team Is Blocked

Use this ritual any time the team finds an organizational or cultural barrier that they're concerned they can't overcome.

Routine Hold Yourself Accountable

Every ritual in this chapter can be performed by an individual, alone. We know many individuals who use these reflection rituals to maintain their standards and hold themselves accountable to their own professional goals, even in the darkest of situations where there are no stars to steer by.

Time to Share with Others

Eventually your project will be finished and you'll have to talk to other people about it. While you may have to work within a particular framework or layout, your team can wield a lot of power with their communications around the impact of their project. The next chapter describes two rituals to focus that power.

Talking about Accomplishment

Congratulations. You're about to wrap up your big project and share all of the great work that your team has done. The quality of your team's work speaks for itself. This should be easy, right? While we wish this were the case, teams often finish projects without considering how to communicate their work's impact on their organization and the world at large.

By now, your team has an immense amount of knowledge. They probably know more than anyone else in your organization about the problems you've solved. Do they know how to talk about it? Are they sharing the right information with the right people?

Teams should be deliberate about how they talk about their accomplishments. When done well, your project communication can influence future priorities in your organization. You know you're doing a good job of sharing your team's work efforts when others begin to make decisions and build project plans around them. In this chapter we'll share two rituals that will help your team do just that.

RITUAL Who Was Affected by Our Work?

At the start of a project, your team only has a glimmer of how their work output is going to end up benefitting their organization and

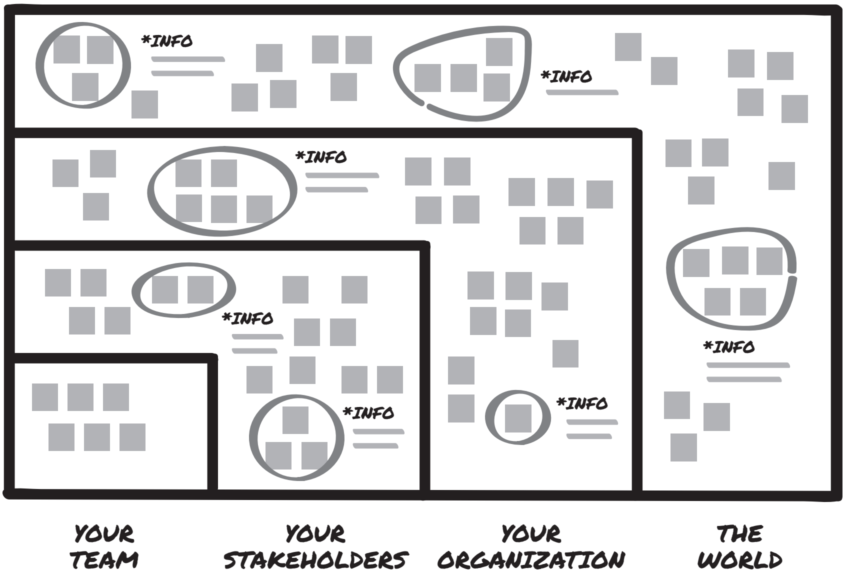


FIGURE 24 "Who Was Affected by Our Work?" example output

the people they serve. But by the end of the project, the scope of your work can expand to include many other people that your team hadn't considered. This ritual will help your team determine exactly who will benefit from your project work when you're done. After doing this activity, teams usually discover they had a much bigger effect than they'd anticipated at the outset of their project. This ritual is our adaptation of the "Ripple Effect" activity in frog's *Collective Action Toolkit*.

1. Identify who will be affected

Set up this ritual's diagram in a location that all of your team members can see. You can use the output from the earlier ritual "Who Gets Invited?" to pre-populate the diagram.

Ask your teammates to write down who will be most affected by your project deliverables. Ask them to think about the following audiences:

- **Your team.** The people who worked on the project with you.
- **Your stakeholders.** Those who were responsible, accountable, consulted, and informed throughout the project.
- **Your organization.** Different departments or staff members whose work will be influenced by your project outcomes.
- **The world.** People out in the world who will benefit from the results of your project, such as customers or clients, or competitors who will need to react to what you've done.

Team members should put each item on an individual sticky note. This can be done in advance of getting together as a team.

2. Share what you've created

Ask each team member to share what they've created. Place their sticky notes in the appropriate areas of the diagram.

3. Decide which audiences to communicate with

Discuss each area of the diagram. Which of these people do you believe are important to communicate with about your project outcomes? Circle those people's names and write for each of them what information you believe they would need to receive and when it should be delivered.

To complete this ritual, assign action items to your team regarding who will prepare and deliver each communication.

Routine Identify Who Is Affected by Interim Deliverables

When your team is comfortable with this ritual, they can use it to consider who is affected by interim project deliverables, as well as what new stakeholders or beneficiaries should be included in your project.

RITUAL What Effect Should Our Communication Have?

Status update emails and check-in meetings. That's what stakeholders need during projects, right? Our stakeholders want to know if we're on track to deliver what we promised. But by the end of a project, we're not talking about what tasks we've completed. We're evangelizing the outcome and how our organization can continue to build on it.

What does the team plan to do with the results of the project? What kind of change do you want to encourage in your organization? This ritual will help your team determine what kind of

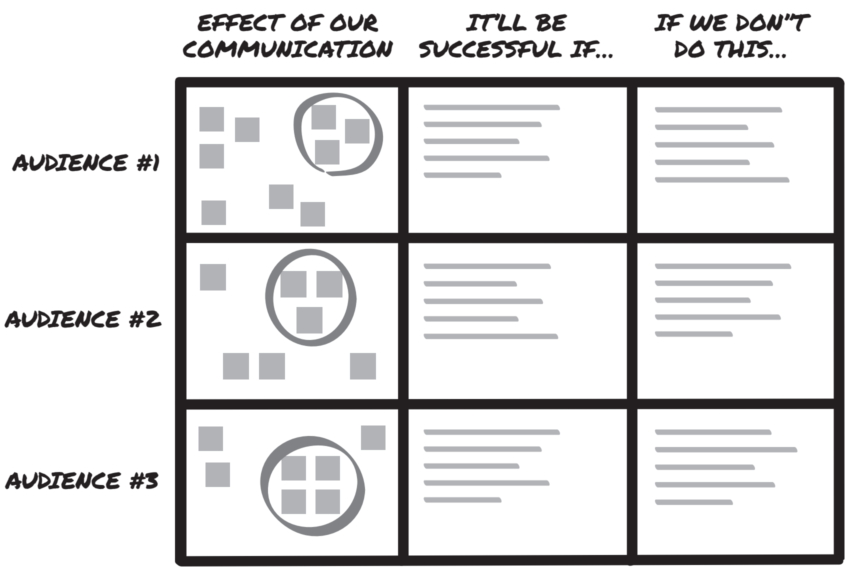


FIGURE 25 "What Effect Should Our Communication Have?" example output

influence you want to create with your end-of-project communication. It's helpful to do this ritual right after "Who Was Affected by Our Work?" and before committing to any formal communication.

1. Agree on your audiences

Set up this ritual's diagram in a location that all of your team members can see. If you didn't do the previous ritual in this chapter, create a list with your team of all the audiences that you may need to communicate with when you complete your project. Give each audience its own row in the diagram.

2. Consider effects on each audience

For each audience, consider what effect your team wants to have with their end-of-project communication. Ask each team member to write those effects down on individual sticky notes. Don't just push information at other people. Think about what you may be interested in "pulling" from these audiences to further involve them in your team's efforts. Consider the following possible effects that your team could have:

- **Think.** What information about your project do you want these audiences to reflect back?
- **Feel.** Are there particular emotions that you want these audiences to feel when they're experiencing your communications?
- **Respond and share.** Is there a particular way that you want these audiences to respond to your communications, or share them with others?
- **Do.** Are there specific actions that you want these audiences to take when they receive your communication? Or at a later point in time?

3. Share what you've created

Ask each team member to share the effects they want to have on each audience. As they share, place each person's ideas in the first column and appropriate row of the diagram.

4. Decide what effects to create

Discuss with your team which effects are beneficial for your project and are feasible to accomplish. Circle those in the left column.

5. Discuss what success looks like

For each audience and effect, discuss what types of outcomes you're seeking, and what might happen if you don't communicate with each audience about your project. Put each piece of information in the appropriate column. Based on what you learn from this discussion, revise your audiences and the effects that you want to have on each.

When your team is done with this ritual, create action items regarding who will fulfill each project communication. When it comes to *what* you should communicate about your project outcomes, draw from what you've created in other rituals, such as "What Problem Are We Trying to Solve?" and "Who Was Affected by Our Work?"

Routine Communicate the Effect of Interim Deliverables

Your team can also use this ritual earlier in the project to determine what to communicate with stakeholders regarding interim project deliverables.

Is This the End?

Eventually the emails to our stakeholders slow to a trickle. Our reports are delivered. Our products are shipped. Every project comes to an end. What does that mean for you and your team?

Endings Matter

The audience starts clapping. Then they stand, whooping and hollering with delight. The team comes to the front of the stage and takes a bow. Fireworks explode, blue and green starbursts filling the night sky. Then the team is treated to a lavish meal, while painters immortalize them in portraits that will line the walls of your corporate headquarters.

If only every project could end like this.

We invest so much in project kickoffs and day-to-day team happiness that the endings of projects can often feel like a letdown—even when the project is wildly successful. What usually happens: Your team completes their work, your stakeholders review what you'd created, and everyone moves on to the next project with perhaps a few kudos from a senior manager. You might even get mentioned at the next big quarterly meeting, before they hand out those cookies you like. End of story.

And then there are times where projects don't end cleanly. Your boss's boss canceled the project. Or funding ran out. Or a competitor swooped in without warning and launched the same thing your team was building. What then? Where's the ritual for the team that drifts on to the next priority at work, still smarting from the things they couldn't control?

There isn't one. Because there is no ritual for what that team really needs: to thank each other. Which is a shame, really, because here are the two things that they're going to remember: the highest point of the project, and whatever happened at the end.

We don't want teams to wait around for someone else to change things for them. Like we said at the beginning of this book: today, not tomorrow. So make the ending of your project, however it turned out, just that. *Your ending.* A team that works together should end things together. They should take a moment to thank each other, no matter how big or small the fanfare and bonus checks, no matter how quickly it will all be forgotten.

Because the ending with your team, where you shake hands and say thanks—or maybe you stand on the conference table and applaud—it's that ending where everyone on the team can see each other for who they really are. You're reminded of everything you've accomplished together. And we hope, in that moment, that you see the people you want to work with again . . . and again . . . and again.

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Afterword

Now that you've finished our book, you might have a few more questions. We'll do our best to answer them before we send you on your way.

I know these rituals are for use with project teams. Can I use them with the people that work in my department as well?

Of course. Though, we're curious, what if we had said no?

I want to use all of the rituals with my team. Where do I start?

Whoa, whoa, hold on a minute. From a time perspective, that's probably not even possible. What's more important is deciding what problem you want to solve first—you might use a 2×2 diagram with all of the rituals to better assess your options. We have our hunches for where most teams struggle—like decision-making—but don't let that influence you if you know your team could benefit from something else.

And don't forget to include your team in the decision for which ritual to try first. Which, we know, is a bit of a conundrum. You want them to decide on a ritual, but the only one who knows about the rituals is you. We get it. It's one of the reasons why we wrote this book: to make it easier for teams to figure out what to try together.

Do you have a favorite ritual? One that's more effective than the rest?

Yes, we each have a favorite. No, no ritual is more effective than any other. Every grain of sand can make a pearl, as Mary's grandmother used to say.

Do you have more examples I can see of the output from these rituals?

The best examples are always the ones that are most relevant to your team and their project challenges. Take fifteen minutes to work through a ritual you want to bring to your team and generate example content that shows how the ritual applies to your team. This is going to get you further than anything we could include in these pages. The last thing you need is someone on your team knocking down a ritual because our example content isn't relevant (actual quote: "Well, our company doesn't make tennis shoes so we can't use this ritual").

That said, don't use the example output you've created to bias the team toward your point of view. It should just show them how to work through the ritual.

What should I share with people at my organization so they'll support me using these rituals?

Our question back to you is: What's standing in the way of finding an hour or two to try a ritual with your team? Worry less about asking for permission to try a few of these rituals, and more about whether the team needs to try different ways of working.

We think it's best to float this content by managers and leaders after you have given a few of them a try. If you immediately got nervous reading that, perhaps show your manager the preface of this book, where we specifically talk about how the book isn't designed to subvert their authority. That might help your case.

I used these rituals with my current team, and now we're moving on to new ones. Can I just have the new team do what my old team did?

It can be tempting to take what you did with your old team and just cart it over to the new team. But you're asking your new team to take on a bunch of new behaviors with no idea why they are relevant to them. Along with your ideas, let team members contribute their opinions as to what rituals would be most beneficial to try. No matter what, the rituals that your new team chooses should support your collective aims.

It's possible that the new team you find yourself on one day isn't at the same old place. Maybe your team will be at a new company, and you'll have a new title and a new desk with a new password. And one day, in a kickoff meeting, where it's too cold and the cookies are missing, you'll wonder how you're ever going to get these rituals started again. Remember, it only takes a moment to say to the next person you see: "We used to do these rituals at my old office. I've got this book that explains them…"

TURNING PEOPLE INTO TEAMS TOOLKIT

Purchase and Download Instructions

Planning to use the rituals in this book with your teams? Digital versions of the instructions and diagrams used for all twenty-seven rituals can be purchased and downloaded from the Berrett-Koehler website (www.bkconnection.com/intoteams). These instructions and diagrams are provided in Adobe PDF, Microsoft PowerPoint, and Microsoft Word file formats. These are the rituals and additional activities that you'll receive in the toolkit:

Part 1. Better Beginnings

Start the Team by Talking about the Team

- Ritual: What Do We Bring to the Team?
- Ritual: What Do We Value as a Team?
- Ritual: What Habits Do We Want as a Team?

What Problem Are We Trying to Solve?

- Ritual: What Problem Are We Trying to Solve?
- Ritual: What Do We Know? What Do We Need to Learn?

What Does Success Look Like?

- Ritual: What Does Success Look Like?
- Ritual: What If We Don't Succeed as a Team?
- Ritual: What Is Our Team Expected to Do?
- Ritual: What Should We Celebrate as a Team?

Plan the Kickoff with Your Team

- Ritual: Who Gets Invited?
- Ritual: What Activities Should Be in the Kickoff?

Part 2. We're Stuck, Now What?

Create the Right Kind of Conflict

- Ritual: Can I Give You Some Feedback?
- Ritual: What Should We Do with This Feedback?
- Ritual: How Can We Improve Our Project Work?

This Decision Should Be Easier

- Ritual: What Decision Are We Trying to Make?
- Ritual: What Criteria Apply to Our Decision?
- Ritual: What Are Our Options?
- Ritual: What Are the Trade-Offs?
- Ritual: Which Option Are We Most Confident About?

Putting Our Ideas to the Test

- Ritual: What Do We Think Will Fix This Problem?
- Ritual: What's Our Hypothesis for This Change?
- Ritual: What's the Impact of This Change?

Part 3. Sprinting to the Finish

Reflecting as a Team

- Ritual: What Should We Change?
- Ritual: What Were the Ups and Downs?
- Ritual: What Can We Not Change?

Talking about Accomplishment

- Ritual: Who Was Affected by Our Work?
- Ritual: What Effect Should Our Communication Have?

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BIBLIOGRAPHY

While books about collaboration may come and go on our bookshelf, we return to these resources again and again. That said, don't limit yourself to the business section when visiting your bookseller. Encourage your team to be omnivorous readers. There is much to be drawn from reading fiction, essays, reportage, and other genres that explore human behavior in all of its complexity.

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INDEX

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David and Mary Sherwin are cofounders of Ask The Sherwins, LLC, a consulting and training firm that helps organizations develop the capabilities they need for better cross-functional teamwork. They have coached product and service design teams and developed innovation training for such organizations as Philips Oral Healthcare, Tipping Point Community, Google UX Community and Culture, and Eventbrite. The Sherwins are on the visiting faculty of Copenhagen Institute of Interaction Design, and David is a Fellow at frog, a global product strategy and design firm.

In their spare time, David and Mary have collaborated on three books, including the design bestseller *Creative Workshop*. They give presentations and conduct training workshops all over the world.

If you'd like further information about what's in this book, as well as additional rituals and articles by the Sherwins, visit the book website at turningpeopleintoteams.com, or stop by and say hello at their website, asktheshenwins.com.

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We believe that the solutions to the world's problems will come from all of us, working at all levels: in our organizations, in our society, and in our own lives. Our BK Business books help people make their organizations more humane, democratic, diverse, and effective (we don't think there's any contradiction there). Our BK Currents books offer pathways to creating a more just, equitable, and sustainable society. Our BK Life books help people create positive change in their lives and align their personal practices with their aspirations for a better world.

All of our books are designed to bring people seeking positive change together around the ideas that empower them to see and shape the world in a new way.

And we strive to practice what we preach. At the core of our approach is Stewardship, a deep sense of responsibility to administer the company for the benefit of all of our stakeholder groups including authors, customers, employees, investors, service providers, and the communities and environment around us. Everything we do is built around this and our other key values of quality, partnership, inclusion, and sustainability.

This is why we are both a B-Corporation and a California Benefit Corporation—a certification and a for-profit legal status that require us to adhere to the highest standards for corporate, social, and environmental performance.

We are grateful to our readers, authors, and other friends of the company who consider themselves to be part of the BK Community. We hope that you, too, will join us in our mission.

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