

Example: Team Norms & Operating Agreement

Project Name: Improve in HR A/P Processes	Project ID: 2013-HR-AP
Project Manager: Lisa Carona	BPI Project Team Members: Lisa, Jack, Joe, Samantha, Sarah

AREA OF IMPORTANCE	DETAILS (be specific)
Operating Norms	<p><i>Use of voicemail, email and instant messaging</i></p> <ul style="list-style-type: none"> • Return voicemails and emails within a specified amount of time (12 - 24 hours) • Provide “out of office” notice when you are unable to check emails or voicemails due to vacation, sickness, or other reason • Follow best practices for email such as: use of subject line, use of “reply all,” communication of sensitive information, do not use all capital letters, etc. • Be clear and concise in all email or voicemail messages • Keep instant messaging “on” when available and turn “off” when away from the office
Communication Guidelines	<p><i>Communications among the team</i></p> <ul style="list-style-type: none"> • Be clear and concise in all communications • Think clearly before responding - don’t respond if you are angry • Keep confidential information among the team, do not share with those outside the core team • Send communications to the appropriate individuals • Provide only necessary information in communications (succinct) • Use appropriate and agreed upon communication challenges
Decision-Making Processes	<p><i>Decision making and problem solving on the team/ conflict management</i></p> <ul style="list-style-type: none"> • Follow common processes and procedures for decision making, problem solving and resolving conflicts • Work toward consensus

AREA OF IMPORTANCE	DETAILS (be specific)
	<ul style="list-style-type: none"> • Balance interests of individuals with interests of initiative as a whole • Use expert team member opinion • Resolve differences by being professional and courtesy • Don't let tensions build, address issues early on • Follow appropriate and agreed upon escalation procedures
Problem Solving Processes/ Approach	See above – decision making processes section.
Conflict Resolution Approach	See above – decision making processes section.
Collaboration Approach/ Team Sharing of Information	<p>Collaborate via a variety of forums:</p> <ul style="list-style-type: none"> • Email • BPI project team portal • Via virtual platforms <p>Share information on status of individual assignments/tasks via weekly team meetings.</p>
How Will Team Support Each Other?	Team members will support each other via sharing of information/reaching out to other team members during weekly team meetings and via the BPI project portal.
What else is important to the team??	<ul style="list-style-type: none"> • All opinions and thoughts are valid and are equal • Miscommunications are OK (don't be afraid to speak up) • Varied perspectives are expected and welcome • Differences of opinion, problems that arise, conflicts will be resolved through a defined process • Complete all assignments as agreed to and on time • Seek assistance when needed and offer assistance when needed • Seek out others' opinions • Respect others' ideas and listen before responding • Ask clarifying questions to ensure understanding