TEMPLATE

TEAM AGREEMENT

BASED ON M365

crativ.ch

We are often asked what needs to be defined in order to work better together in a team with new tools from the M365 Eco System. Here we have dared to present an example of a team agreement with M365 as a basis for work. Use it as a template and adapt it to your individual working environment. If you have suggestions for additions, you can access our working document here, in which you can contribute. We will update the download as soon as we receive new content from you.

Cool, that you join in!

Greetings from the crativ team

TEMPLATE TEAM AGREEMENT

mit M365 als Basis

Transparent team communication

- In our team, basically everyone sees everything - transparency is our main principle.
- We decide together whether our team is a closed group (private) or whether others can join our team (public).
- We allow a single private channel for formally confidential matters in our team.
- To encourage social interaction we have a dedicated "gossip" channel, so we separate social and business in a simple way.
- We start our communication in the general channel and learn, only then we define further channels if necessary, but always under the premise; less is more.
- We consistently set our own preferences regarding notification, only what may explicitly disturb me should be displayed to me.
- We only use mentions in our channels if our content is really worth mentioning, so we only disturb our colleagues if it makes sense for them.

Interaction with guests

- We deliberately do not invite guests to our team!
- If we have projects with customers and partners, we define our own topic-specific teams with their individual team agreements...

Our team shares

- In our team file share, we manage our documents according to our company's privacy policy (for example, only data without special protection needs).
- We include file repositories at the top of our team context that allow us to bridge the gap between the old world and the new world (for example, an existing onsite SharePoint library for data with special protection needs).
- We also include, where possible, other systems relevant to our team for formal file storage (for example, electronic Leitz folder, GEVER or other document management systems).

Team tasks

- We manage our tasks in our team transparently in Planner, so we make sure that all personal tasks across teams and projects come together via ToDo/Tasks and that we have our own, individual planning under control.
- If we work with Jira, we integrate Jira into our team context. In the medium term, we will also use ToDo for Jira to integrate these tasks into our personal context (requires Jira in the cloud, Jira onsite will soon be history anyway).

Team notes

- We manage our notes in our team OneNote. We can also create specific notebooks in our team context. The important thing is simply to maintain transparent access.
- If we use Confluence as a wiki, we can also integrate this form of collective documentation into our team context. It is important to decide which form we use for what and to remain consistent.

Team Meeting Formats

- In order to always be coordinated and to divide our tasks among ourselves in a self-organised way, we have periodic StandUp's. A StandUp lasts a maximum of 15 minutes. We define the periodicity together, for example every two days. To do this, we use our Team Planner in the "assigned to" view. The StandUp can be conducted online, onsite or hybrid and is always conducted at the process level by a jointly defined facilitator from the team.
- We hold our recurring team meetings bi-weekly. We stick to a fixed process, which is led by a jointly defined facilitator from the team. We keep our notes and decisions in the team notebook, we record our tasks in our team planner, and we store files in our team files folder.
- Now and then we look back, that is part of our continuous improvement process. We call this retrospective. Here, too, we have a facilitator from the team who guides us through the process. For this we use our whiteboard, with the template "Retrospective". We copy the results from the whiteboard permanently into our team notebook. We record our goals in our Team Planner. We do the retro once a quarter.
- We always make invitations to our team meetings in the appropriate channel, so that we ensure that the resources we have developed always end up in our team context in a comprehensible way.

Transparent information among the team

- We have embedded our own video channel in our team context, which we use as a sustainable source of information. If something needs to be communicated to everyone in the team, it can be done authentically and simply via stream. The information is then available at the same time and to everyone in the same way. No cascades and filters.
- A new piece of information to the entire team is announced in the general channel.

LITTLE HELPERS

- To express our appreciation to one or more team members, we use the praise function in the General channel.
- To formally obtain approvals, we use the Approval function directly from the respective channel.
- To make quick decisions in the team and make them visible, we use the Quick Form function directly in the respective channel. We copy the results into our meeting notes.
- For larger surveys we use Forms, but always make sure that the results are saved in the team context (setup via files, Forms for Excel, directly into the right folder).
- To collect any ideas from the team, we set up campaigns in the employee ideas app, which we integrate directly into our general channel.
- To find appointments with external people or with employees whose calendars are not visible, we use the Outlook AddIn FindTime, which saves us a lot of time thanks to the integrated automatisms.