



The **RULES OF ENGAGEMENT**

GUIDE



AMANDA PARKER | THE COURAGE FACTORY®

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The **RULES OF ENGAGEMENT** Guide

**THANK YOU FOR DOWNLOADING
THE RULES OF ENGAGEMENT GUIDE!**

This guide contains a step-by-step process, guiding questions, a blank template, and checklist to help you co-create the Rules of Engagement with your team today.

Each page of this guide is labeled with how it can support you to carry out this exercise today. You can subscribe to The Courage Factory's newsletter **inspire.courage** to make sure you don't miss other valuable tips, tools, and course offerings. couragefactory.com/sign-up

What Are **RULES OF ENGAGEMENT**



What Are Rules of Engagement?

When starting a new relationship of any kind, it's important to talk about the "ground rules" for how you will interact with each other. With teams, these are the Rules of Engagement that each member of the team agrees to abide by and hold each other accountable to.

The Rules of Engagement are made up of behaviors, norms, and responsibilities within the team. It can include, for example; accountability, decision-making, cell phone usage in meetings, conflict resolution, how to give feedback, etc. Essentially anything that is important for your team to work well together.

Why Create Rules of Engagement?

One of the best ways to get your team aligned and committed to your business goals is by giving them a chance to contribute to how the team works together.

A clear and mutually-agreed upon set of rules for the whole team allows for open dialogue when things are not going as expected, and allows each member of the team to take ownership and easily hold others accountable when something needs to be added, removed, or changed.

The Rules of Engagement creates a common language and offers an easy way to have a discussion about what is (or isn't) working in a team. Everyone on the team has the opportunity to contribute to the creation of The Rules of Engagement - so they feel some degree of autonomy over how their work gets done.. They also have the power to suggest an update or to point out when something is not being done as agreed.

Anyone who has lead a team before understands just how valuable this open, transparent, and honest feedback can be to keeping team members motivated and engaged in their work - while alleviating conflict and unertainty.

How to Create **RULES OF ENGAGEMENT**



When to Create Rules of Engagement?

Ideally, you would create this agreement at the very beginning of your working relationship. However, this isn't always possible - maybe you only just heard of it today and are already working with an existing team, or perhaps you never felt you needed one previously.

Fear not, there is never a bad time to create a Rules of Engagement. Wherever you are in your teamwork, you can get started today. Be sure that once you establish the rules you all work together to check in on them at regular intervals and make sure they still represent the needs and desires of the team. If they become outdated they may become obsolete will be of less value.

How to Create Rules of Engagement?

Get your whole team together (virtually or in-person) with the explicit purpose of designing your relationship together as a team. Explain the purpose and what ownership each member of the team has over the results and accountability.

Allow space for questions, concerns, or additional ideas. This exercise is meant to give each member of the team a say in how you work together and should create a sense of autonomy and enthusiasm for your joint work.

You can prepare yourself in advance by deciding on some rules that are important for you from your team, and be sure to give the team the opportunity to share first. As the leader, your team will (by habit) want to follow your lead and may take your ideas as gold, thereby preventing them from openly sharing their ideas from the beginning.

Encourage participation and give everyone a chance to speak up.

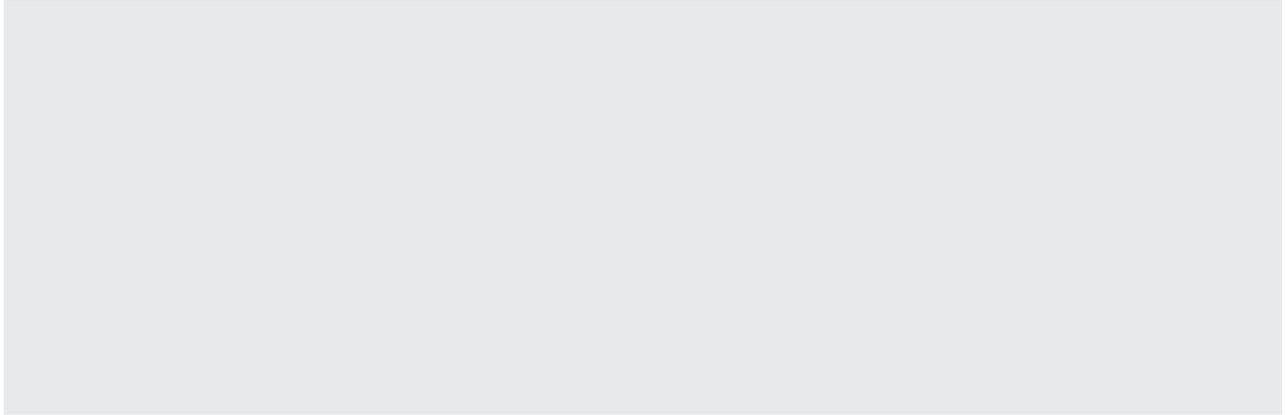
In the following pages you will find a step-by-step guide, guiding questions, a template, and a cheat sheet for how to establish your team's Rules of Engagement.



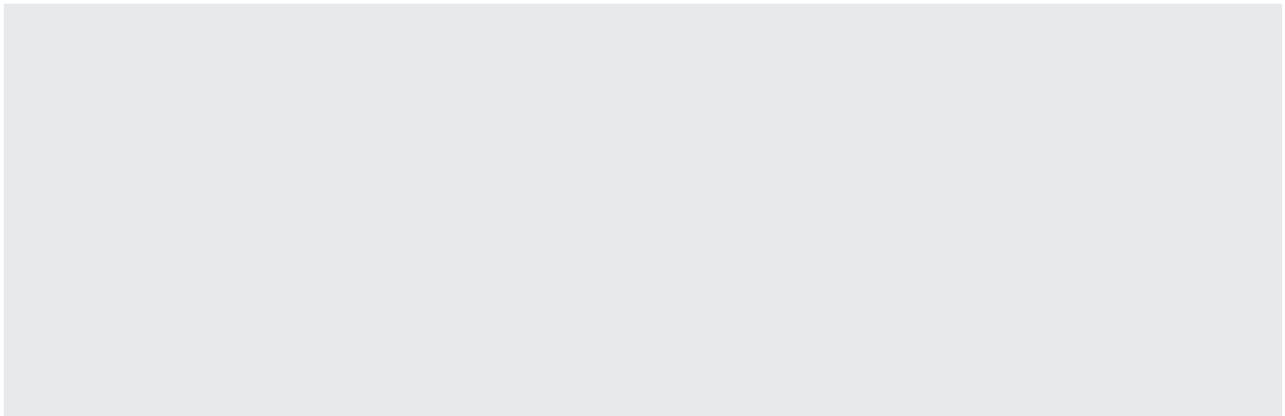
STEP-BY-STEP PROCESS

Step 1: Preparation & Ground Work

What are your objectives for creating a Rules of Engagement with your team? What do you hope to achieve? What would be a good outcome for you?



Which ground rules would be important for you with your team? Keep these in your back pocket when you start the discussion. The goal is to let your team members share their ideas first (before being influenced by yours) and then add in what you think would still be valuable.



Step 2: Block Time in Your Team's Calendar

Organize +/- 1 hour to get your whole team together at the same time for the explicit purpose of creating the Rules of Engagement. This can be done virtually or face-to-face. Make sure you have enough time for the whole team to share, while staying focused on the task at hand.



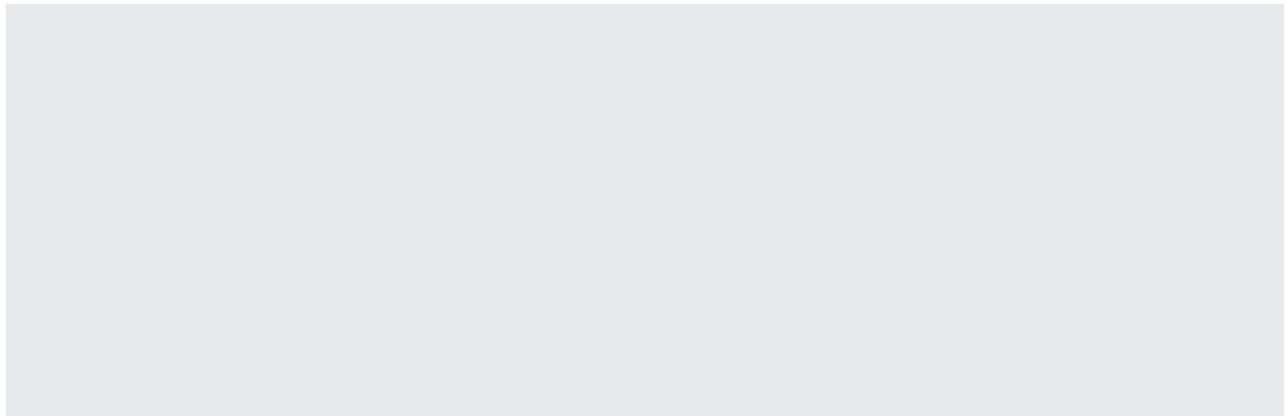
STEP-BY-STEP PROCESS

Step 3: Guide the Conversation

Your role as the leader is to facilitate this conversation with your team.

To get the discussion started, share with them the purpose of the Rules of Engagement and your objective for doing this together. You may need to ask guiding questions, or to get the ball rolling with one or two examples of your own. (You will find some guiding questions and a template you can use in the following pages.)

Which guiding questions do you want to be sure to ask your team?



Step 4: Listen and Write Down Responses

Ask your team to share their ideas. Listen to understand and summarize it back to them before writing it down. You can use a (virtual) white board or flip chart to record the team's responses so everyone feels heard and can see what is being shared and agreed on transparently.

This isn't a time to judge other people for what they need, but rather to allow each person to express what will help them to be a better contributor and to feel like a valued member of the team.

A note for you: Remember your goal for doing this exercise with your team and be sure to give plenty of space for their ideas to come to life. Be careful how you express when you agree (or disagree) so that you don't discourage them from sharing further or asking for what they need.



STEP-BY-STEP PROCESS

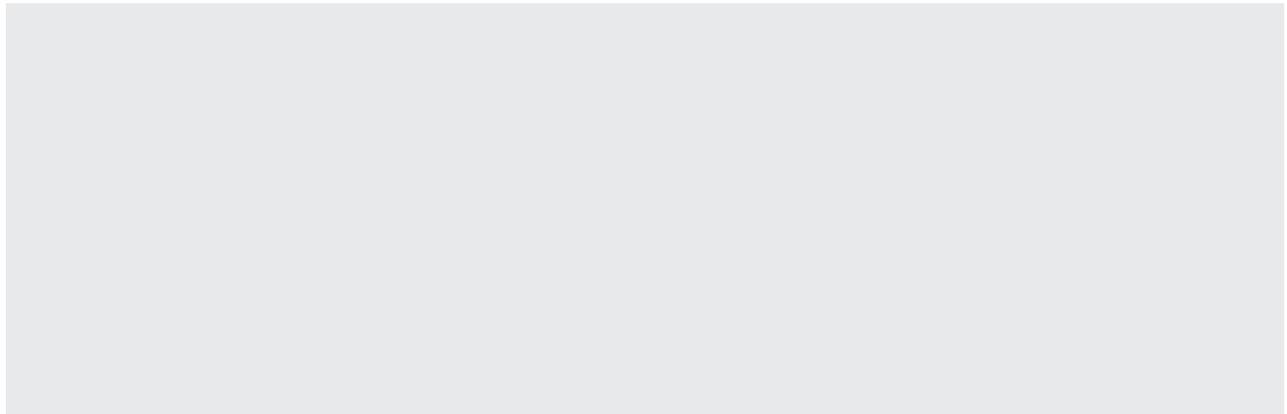
Step 5: Agreement & Next Steps

Getting your team's agreement and buy-in is crucial at this stage - otherwise the exercise has no value (or consequence) later on.

Ask your team if they agree and are willing to commit to the Rules of Engagement. Allow people to express what they don't agree with and why. Sometimes simply understanding the why behind another team member's comment will give them new perspective and help them feel more comfortable agreeing to it.

Once you've gotten buy-in from the team, ask them when they'd like to check in on the Rules of Engagement next.

How often do you want to check in on the Rules of Engagement with your team?



You're ready to get started!

In the following pages you will find a number of tools to support you, including:

- Guiding questions
- A blank Rules of Engagement template
- A checklist to bring to your meeting

GUIDING QUESTIONS

Here are questions that you can use to guide the discussion with your team. Decide which ones are most important for you and your team, based on your overall goals. Don't feel obligated to use them all - take what you need and leave the rest out.



How do we want to work together as a team?

What do you need from me as your leader?

What do you need from each other?

How do we handle conflict?

How do we celebrate success?

How often do we want to communicate?

How do we check in with each other on work-related tasks?

What do we do when someone doesn't follow through on what they say they will?

What values are important to us as a team?

How do we escalate problems up?

How do we give each other feedback?

How do we share lessons learned?

What else do we need to design?

OUR TEAM'S RULES OF ENGAGEMENT

Our team values are...

This is important to us as a team...

We communicate using the following tools....

This is how we celebrate together...

We meet as a team times a week for minutes.

This is how we handle conflict...

OUR TEAM'S RULES OF ENGAGEMENT

When someone doesn't do what they say they will, we...

This is how we escalate problems...

We give feedback in the following ways...

Here is how we share our lessons learned...

**We check in on project tasks times a day/week/month
minutes.**

Here is why we're grateful to each other and this team...

RULES OF ENGAGEMENT CHECKLIST

- Set your objectives for creating Rules of Engagement with your team**
- Reflect on what would be a "good" outcome**
- Define the rules you would value highly**
- Block a time in your team's calendar**
- Facilitate a Rules of Engagement co-creation with your team**
- Get agreement from all members of the team**
- Agree on a date to check in on the Rules of Engagement together**
- Thank your team for showing up and participating**
- Hang (or share) the Rules of Engagement publicly for the whole team to see**
- Check in on your progress & see how you're doing - make adjustments as necessary**



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Congrats!

**YOU'VE JUST
COMPLETED THE
RULES OF
ENGAGEMENT
GUIDE!**



**I'm Amanda Parker,
Certified Online Leadership
Coach & Founder of The
Courage Factory**

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