

Plug In

Collaboration: A process that attends to both tasks and relationships

1. Plan

Determine the Goal



Task

Identify the desired outcome, and determine why collaboration is required to achieve it.

Gain Sponsorship



A sponsor is someone who is committed to the work and a successful outcome, supports it (maybe even funds it), and has the authority to approve and make it happen. Consult with your sponsor to identify who should participate and why, and enlist the sponsor's help in getting people on board. Come to agreement on how frequently to meet with them and for what purpose, and determine the best method for keeping them up to date.

Identify Who To Involve



Task

Reflect on the overarching goal and draft a list of potential team members based on the expertise needed, who has a legitimate stake in or is affected by the intended outcome, what diverse viewpoints would be valuable, who is important to involve (politically), and whose support is needed for approvals and financing, or to implement resulting solutions and changes. To keep the size of the group from becoming unwieldy, consider having a core team and calling upon other subject matter experts as needed.

Invite Participation



Invite all team members to participate. Explain the project, its importance to the business, the members' roles, why they've been selected, and the expected time commitment. Confirm that team members have the availability to commit to the project. Also ask what concerns they might have.

2. Launch: Kickoff Meeting

State the Purpose of the Meeting and Conduct Introductions



Begin with a brief statement about the purpose of the meeting, and then conduct introductions. Having introductions early in the meeting sets people at ease and begins to build trust. Incorporating some self-disclosure into introductions helps build trust faster.

Validate Goals and Outcomes



Engage in conversation about the goals and outcomes to help shape the work that needs to be done. To encourage conversation ask: Does this sound like it's on target? Are we solving the right problems? What other related issues should we keep in mind? What is your perspective on our goals? What concerns do you have about our work together? What are you most enthusiastic about?

Establish Roles and Responsibilities



Typical leadership roles are Leader, Project Manager, and Sponsor. For meetings, typical roles are Time Keeper, Note Taker, Devil's Advocate, and Process Checker. After determining the work to be done, additional team member roles may be necessary.

Determine What the Work Is and How to Do It



Create a plan for achieving the goal, and then create a project plan that includes a task list, team members' assigned responsibilities, and a calendar with milestones, including check-ins with the Sponsor.

Develop Team Agreements



Engage the group in discussion about and gain agreement on standards for how the group will work together. To get started, suggest a few possibilities, and be sure to discuss how the group will make decisions.

Summarize and Identify Next Steps



Summarize the meeting's key discussion points and decisions. Discuss next steps, including due dates, and either schedule the next meeting or get regular meetings on the calendar.

3. Ongoing Work

Sustaining the Collaboration as the Work Gets Done



Employ best practices for sustaining energy and keeping the work moving forward:



- Have a structured agenda for all meetings.
- Include a brief warm up for at least the first few meetings.
- Review and update the time and action calendar to keep people in the know.
- Be vigilant about external activities or changes in the organization that may impact the team's work and discuss them.
- Ensure that team members hold themselves and each other accountable for following through on commitments.
- Have regular check-ins to discuss how well the group is working together and what could be improved.
- Schedule regular progress updates with the Sponsor(s).
- Look for opportunities to acknowledge team members' contributions.

4. After-Action Review

Final Meeting



Task

Conduct an after-action review to discuss lessons learned regarding the business outcomes and how well the team worked together. Ask:

- What was our goal? What were our expectations? What was supposed to occur?
- What actually occurred? What was achieved? (Facts not judgments!)
- What went well and why? (Include a discussion of how well the team worked together.)
- What can be improved and how? (Team process and business outcomes.)