



Designing An Alliance Process Guide

Designing an alliance, or working group norms, is a key way to foster trust and create transparency and accountability. Whether you use this template at the organizational level, team level, or in a 1:1 relationship between a manager and direct report, this process will help guide the way.

* Step 1: Provide time for personal reflection.

Send questions out in advance to give participants ample time to reflect on them prior to reviewing them in a group.

* Step 2: Share out as a group or pair.

- Whether it's in a 1:1 setting or within a larger group, choose a dedicated time to share.
- Start by explaining the purpose of the alliance-building exercise– a way of establishing trust, creating personal and team empowerment, and encouraging healthy communication of needs.
- While an organic conversation may feel natural for a 1:1 setting, for groups, you can go question by question and do a roundtable exchange, with each person sharing out, or utilize sticky notes (this [platform](#) has a great digital version) to gather everyone's input. Identify your non-negotiables (needs vs. nice-to-haves) upfront.
- As you gather inputs, group them into themes to understand where there is consensus. In a 1:1 setting, it will become quickly clear where there is alignment or not, but in a group, it may take more intentionality.



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* Step 3: Seek out alignment.

Inclusive decision-making can look different for different organizations and the size of the group and how much time you have definitely plays a role in how you find alignment. Whether it's by consensus or majority, here are a few things we recommend taking into consideration when making a final call:

- **Understanding what's at stake (the why) for outliers.**
 - For some, a different preference might be just that, a preference. But for others, it may be a true barrier to them being able to participate or engage effectively. Getting to the root of that difference can be helpful in determining how to move forward as a group.
 - Wondering how to figure that out? Ask the person. Then believe them and honor that distinction.
- **Leveraging empathy and flexibility to find alignment.**
 - If what the majority of people prefer truly serves as a barrier for others, try having people share out those barriers / reasons why majority might not work for everyone and have everyone participate in brainstorming alternative solutions that adjust for outliers.

* Step 4: Don't be afraid to revisit your agreement and course correct if necessary.

Remember that needs may change so be sure to check-in regularly on them and return to them when there's a lack of clarity or adherence to the agreement. In those moments, ask the group, should these be changed?



Working Agreement Questionnaire

Prompts	Responses	Agreement
My current barriers to showing up at full capacity are...		
The best time for me to attend meetings is...		
My boundaries for communicating outside of work hours are...		
I need you/my team to be mindful that...		
I need you/my team to support me by...		
You can tell I've reached my capacity or am overwhelmed when I...		
I can commit to showing up in my work in these ways...		

Note: Some of these prompts are designed to build awareness and may not warrant alignment, rather they can help others understand what's going on for their colleagues.

Working Agreement Questionnaire - Example

Prompts	Responses	Agreement
My current barriers to showing up at full capacity are...	<ul style="list-style-type: none"> • childcare • mental exhaustion • anxiety 	We accept that it's unrealistic for everyone to show up at 100% capacity right now
The best time for me to attend meetings is...	<ul style="list-style-type: none"> • between 9-1pm • late mornings • whenever 	We will try to keep mtgs to between 11-1pm and will fill ppl in appropriately if one has to happen outside of that time
My boundaries for communicating outside of work hours are...	<ul style="list-style-type: none"> • no Slack or email on weekends • only urgent msgs after 6pm • I don't mind getting them, but won't respond 	Only Slack ppl outside of the hours of 9-6pm if it's an emergency. Do not feel pressured to respond outside that time.
I need you/my team to be mindful that...	<ul style="list-style-type: none"> • I'm helping take care of a family member • I have a compromised immune system 	
I need you/my team to support me by...	<ul style="list-style-type: none"> • Understanding that I won't always be able to be on • Giving me space when I need it 	
You can tell I've reached my capacity or am overwhelmed when I...	<ul style="list-style-type: none"> • When I start to get short • If I'm struggling to focus • When I put on my Slack away message... that means I just need time to do heads down things 	
I can commit to showing up in my work in these ways...	<ul style="list-style-type: none"> • Being present and focused during meetings • Being kind to my coworkers • Answering emails within 48 hours 	We are agreeing as a team to be present during meetings, answer emails within 48 hours, provide coverage as needed based on childcare duties or other needs...

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