

# Establishing Team Norms

## Steps for Success



### Step 1: Align with Other People Leaders

While you will be the first point of contact for your team members and will be responsible for making decisions for your direct report team, it's important that you align expectations and overall norms with other people leaders throughout your business unit. Each group does not need to have the exact same norms, but they should not be in contradiction with each other. For example, if a Director plans to have all employees come in office for a quarterly All-Hands Meeting, managers and supervisors should include that expectation in their respective team norms.



#### Possible Alignment Questions For People Leaders:

- Are you having employees follow a set schedule of office / remote days, or allowing employees to choose on a week-to-week basis?
- Are employees required to come in for team meetings?
- If someone is needed for an in-person meeting, are they expected to stay in the office for the rest of the day?
- Other questions based on specific business unit needs.

Remember, your larger group does not need to have the exact same norms / guidance, but strive to avoid discrepancies in the larger team norms that could cause confusion for employees.

#### Action Items:

1. Work with your direct leader to understand any larger team expectations that you need to be aware of as you establish norms with your direct report team.
2. Communicate with your peers in your business unit throughout the process to make sure your norms are generally aligned.

### Step 2: Prepare Yourself and Your Team

Involving your team in the process of establishing norms will greatly improve overall buy-in and support. Prepare your team by sending a meeting notice at least one week in advance and choosing a time when all employees can participate. Ideally, block at least 90 minutes for this important conversation.

To help prepare, send your team an email in advance letting them know the purpose of the Team Norms meeting, and providing them with questions in advance of the meeting. (See [Team Norms Sample Email](#) and [Team Norms](#)

[Employee Guide](#).) Encourage them to use the employee guide to write down their thoughts prior to the meeting. It would also be beneficial to send an agenda so that your team knows what to expect in the meeting, and a reminder that the use of video is encouraged. (Check out [Team Norms Sample Document](#) and [Team Norms Meeting Agenda](#).) Additionally, it would be helpful to recruit a note-taker for your meeting so that you can focus on leading the discussion.



In addition to preparing your employees, take time to intentionally plan the meeting structure and flow. How will you cultivate a psychologically safe environment for your employees? How will you frame the conversation so that it starts from a place of positivity?

### A Few Options That You Can Consider:

1. Start the meeting with recognition and appreciation. Specifically name what you appreciate about the team, and / or give opportunity for team members to share about one another.
2. Reflect on our company values (*do the right thing, champion people, shape the future*) and how they relate to team norms. Encourage your employees to discuss how these values have shown up in your team already.
3. Remind your team of the shared vision. Discuss the ambitious goals of the company, and how your group supports that work. Help make connections between team norms and high performance.
4. Be clear about how team norms are co-created. While you (*as the team leader*) will eventually need to make the final call, it's important to hear all perspectives and for everyone to listen without judgment to one another in the process.

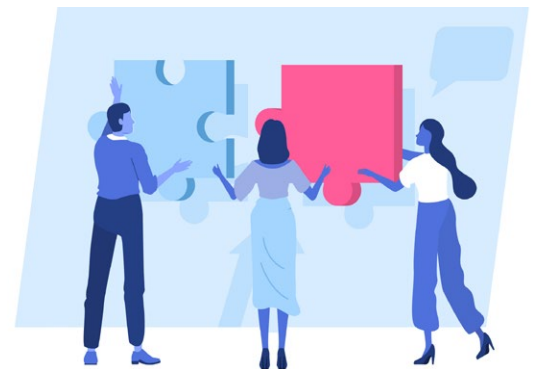
### Action Items:

1. Send your team a preparation email.
2. Put together a team norms meeting agenda.
3. Make a plan for building psychological safety into your meeting.

## Step 3: Have your Team Norms Meeting

After all your work of preparation, the meeting should go smoothly! The following leader notes will help you stay on track:

- Start your meeting on time.
- Remind everyone that video is preferred.
- Stick to your agenda and timeline.
- As you discuss, have the note-taker capture a list of ideas for behavioral norms. Ask for consensus when needed.  
(ie: "Pam suggested we establish a norm of 48 hours for email response time. Do the rest of you agree?")
- Some norm topics will overlap, that's okay! Capture all the thoughts and sort out the norms later into categories as needed.
- Avoid getting bogged down on one topic. Keep moving through the agenda according to the allotted time, and make plans to revisit details later.



It's important that all your employees feel safe and encouraged to share. Here are a few ideas for how you can foster this type of environment.

1. Utilize a "round robin" for some key questions. This is when you ask everyone to share their thoughts to ensure that all voices are represented.
2. If some folks are dominating the discussion, remind the whole group that these team norms should be co-created by the whole group, so it's important to hear from a variety of perspectives.
3. Encourage people to use the chat function in Teams to give their ideas if that is more comfortable.
4. Specifically ask less dominant folks if they agree / disagree with what is being discussed.
5. Encourage healthy discussion by asking: *"Are there any differing opinions or perspectives that we should consider?"*
6. Provide a link where employees can submit questions or comments anonymously.
7. Provide employees with the opportunity to follow up with you after the meeting, if needed.

Team norms can illicit some strong emotions from employees. Allow your team to give their honest opinions and thoughts, but if statements begin to become unprofessional or inappropriate, interject and remind people of the goals of the meeting and standards for communication.

Close your meeting by thanking the team for their participation, encouraging them to send additional thoughts and feedback if they have any, and information about what they can expect next.

#### Action Items:

1. Follow your meeting agenda.
2. Use video and have a note-taker!
3. Encourage sharing from all participants.

## Step 4: Document, Review, and Share your Team Norms

After your meeting, collect the notes from your note-taker as well as any other feedback or thoughts that your team may send. Create a document that clearly lists all the agreed-upon norms. (See [Team Norms Sample Document](#).)

If there were a variety of opinions about a norm, it is your role as the leader to make a decision that is in the best interest of the team and business goals. You may want to seek input from your leader, HRA, or ODA if there is a particularly difficult issue.

After you've completed the document, send it out to your team for their final review and feedback. Additionally, let them know where the document will be stored (*Teams site, SharePoint location, etc.*) and how often it will be reviewed and updated. Ideally, plan to revisit your team norms twice per year to ensure that they are still serving the group needs.

After you've received feedback, publish the team norms and refer to them often as you make decisions with your team!

Be sure to publicly thank your team for their involvement in collectively establishing the norms.



### Action Items:

1. Create your Team Norms document from notes.
2. Send document to team for final review and feedback.
3. Publish Team Norms and refer to them often!

## Step 5: Utilize and Update Team Norms

Now that your Team Norms are created, use them frequently! Refer to the norms when there are questions about communication, collaboration, or culture protocols, and especially if there is a lack of clarity around expectations.

Additionally, incorporate a review of your Team Norms with every new employee to your team. You or another team member should go over the team norms in detail with new employees, and give them the opportunity to ask clarifying questions.

Evaluate your Team Norms about every six months with your team, or when there are changes in the team dynamics that will require team norms to be revisited. This frequent review and update will ensure that they continue to serve the team well, and will accurately reflect the needs of a changing group dynamic.

Occasionally, a norm may need to be changed due to a change in work environment, company policy, or other circumstances. If that is the case, remember to clearly communicate the change to your team and update the document accordingly.



### Action Items:

1. Refer to Team Norms when team is facing conflict.
2. Review Team Norms with all new team members.
3. Evaluate your Team Norms every six months.



**SoCalGas University**  
*Inspiring Minds. Building Skills.*