

Teams Working Together



Shared Expectations Templates

A key to aligning expectations

EXAMPLES:

Shared Expectations: Mentor/Mentee

Shared Expectations: Project Manager/Project Team

Shared Expectations: Chapter President/Board of Directors

Shared Expectations Document

Introductory Comments

In entering into a new working relationship, I have used the “Shared Expectations” exercise for getting started. Everyone is a key contributor, and we are all in agreement and understand our commitments.

This is done as a team, asking questions, clarifying the responses, and documenting the results.

After creating the Shared Expectations document, all individuals sign (or concur in writing) so that you have everyone giving “buy in” to what is expected.

The Shared Expectations document is posted or readily available for reference by the team or individuals involved.

To give you a sample of the results, here are a few examples. I would encourage you to keep your Shared Expectation document to one page. Feel free to modify the templates in this document to fit your needs. (There are 3 examples to give you an idea of its use.)

As you use these templates, I welcome your input on what worked/didn't work for you, or a new template that you may have created. I'm always in to continuous learning and improvement.

Thank you – I look forward to hearing from you. Good luck in aligning expectations and achieving your goals!

Wishing you much success –

Connie

Connie Plowman, PMP

PMI Volunteer Leader

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Shared Expectations
Mentoring Relationship
between Connie Plowman and Jane Smith

In entering a leadership relationship (mentor/mentee), our commitments to each other are listed below:

Our Guiding Leadership Principle	We will both work from facts and data, not from opinions and hear-say. It gives us a solid foundation for decision making, advising and discussing.
CONNIE'S COMMITMENTS	JANE'S COMMITMENTS
Anything we share will be held in confidence, and not shared with others (unless we mutually agree so)	I will be respectful of the relationship and keep confidential discussions confidential
I will give 100% my attention when we engage in discussion	I will respect your time by keeping appointments and promptly returning calls or emails
I will commit to weekly phone dialogues, and will seek opportunities to meet in person, when possible	I will actively communicate my interests and clearly state my goals
I will schedule one hour of time for these discussions, which can be modified upon mutual agreement	I will set an agenda for meetings and/or phone discussions
I will provide my expertise from the PMI Global level, as well as chapter and regional level	I will be proactive (as appropriate)
I will follow-up on my action items in a timely manner	I will set realistic expectations for myself
I will share as much information as possible, including information given to me that was not held in confidence by others	I will follow up on recommendations / contacts in a timely manner
I will learn from you, and you will learn from me	We will learn from each other
You can terminate this arrangement at any time, without reason	Prior to terminating our agreement, I will keep you informed of what's working/what's not working

Connie Plowman, Mentor
Date:

Jane Smith, Mentee
Date:

Shared Expectations between Project Manager and Project Team

In starting together on this project and as a unified project team, our commitments to each other are listed below. This is in addition to our roles identified in the project plan, and ground rules for meetings.

What are your expectations of me as the Project Manager?	What are my expectations of you as Team Members?	What are your expectations of each other as Team Members?
To provide the leadership to get the project done on time, within budget, and meet performance	To take ownership and understand your part of the project	To respect and help one another
To set clear goals/objectives	To complete your tasks on time and deliver with high quality	To know that we are depending on each other to get our work done on time
To remove barriers	To identify obstacles in advance, to be proactive	To solve problems at the lowest possible level
To encourage participation	To be an active participant	To be an engaging team member
To have open and honest discussions	To face the brutal facts, and be willing to address them	To work towards solving problems as a team, not as individuals
To clearly communicate internal and external impacts to the project	To stay informed of the Issues Log and Decision Log to avoid repeating	To close-out issues as effectively and timely as possible
To trust and respect us as project team members	To trust and respect me as your project manager and leader	To be worthy of your trust and respect, and not abuse it
To respect our time by starting meetings on time and ending on time	To attend meetings on time and be prepared for the discussion	To be knowledgeable for one another, if a team member is absent
To provide us with the opportunity to grow our project management skills	To be willing to learn, listen, and apply new tools and techniques	To be a continuous learner
To handle conflict quickly, when it occurs	When conflict occurs, we will focus on the problem or process, and not the person	Understanding that conflicts will happen, and it will not be taken personally
To have fact-based discussions	To bring forward evidence or data to support discussions, and not "opinions" or emotional responses	To be actively engaged and supportive in discussions
To let us be part of the decision making process	Know that decisions will be made as a team, when possible, or sometimes by the project manager	We will contribute to and respect the decisions that are made

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SIGNED: Project Manager _____ Team Member _____ Team Member _____
Team Member _____ Team Member _____ Team Member _____

Shared Expectations between PMI Chapter President and Board of Directors

In working together as a team for the PMI-XYZ Board of Directors, our commitments to each other are listed below:

What are your expectations of me as Chapter President?	What are my expectations of you as Board Members?	What are your expectations of each other as Board Members?
To be an ambassador for PMI and the PM profession	To also be an ambassador for PMI and the PM profession	We are all ambassadors and will behave as professionals at all times
To share the vision and be a strategic facilitator	To transform the vision into action with solid operational plans	To share our operational plans (and their interaction) and leverage our collective expertise
To break through barriers that may become obstacles	To identify problems and come forward with alternatives and recommended solutions	To discuss potential solutions as a team, where appropriate
To be a sounding board	To listen and be supportive	To articulate our point, and not use "air time" to get our point across
To be open to new ideas	To bring forward new ideas that are aligned with the strategic goals of the Chapter	To know the Chapter's strategic goals and how our projects/initiatives are aligned with the goals
To share leadership knowledge	To share your functional and leadership knowledge	To learn from each other
To know the right resources and connections with the PMI network for problem solving & solutions	To solve problems at the lowest possible level – before escalating to the Chapter President or PMI GOC	To share information and connections as we find them
To start meetings on time and end on time	To actively participate in board meetings by adding value to the discussion	To be "present" in the meetings and not distracted (i.e.: cell phones off)
To publish an agenda for each meeting	To come prepared to each board meeting & there are no "surprises"	To submit status reports on time for our areas of responsibility
To maximize the strengths and talents of each Board Member	To identify your strengths so that they can be effectively utilized	To agree to disagree, when necessary
To communicate, communicate, communicate	To communicate in a 2-way dialogue (Skype, phone, face-to-face, not just by email)	To proactively communicate, in a variety of formats (more than email)
To consider Board Members as experts in their areas of responsibility and seek their advice	To also seek the advice of the Chapter President (individually or as a group)	To reach out to each other, when help is needed

Created: 14 October 2014

SIGNED: Chapter President _____ President-Elect _____
 Secretary _____ Finance _____ Membership _____
 Marketing _____ Programs _____ Volunteers _____