

# Rules of Engagement

by Patrick J. McKenna

Whether working with a practice group, an executive team or the members of some firm's strategic planning committee, I continue to be struck by the dysfunctional behavior that is often present in group meetings. I don't know why I continue to be surprised. Working together in groups is not a natural, comfortable or easy thing for many of us to do.

What I have come to learn is that the very best market-performing groups, in the best firms, have established for themselves some written guidelines by which all members have agreed to abide – and often, each partner in the group has physically signed-off on. These groups have discovered that in order to operate effectively they need to formalize what specifically they should expect of each other as members of the particular team. I have come to call these a group's 'Rules of Engagement.'

Rules of engagement are working guidelines which a group consciously establishes to help individual members decide how to act. These rules are intended to define a behavioral model which addresses how individual members will treat each other, communicate, participate, cooperate, support each other, and coordinate joint activity. They may be used to define and standardize the group's procedure, use of time, work assignments, meeting logistics, preparation, minutes, discussion, creativity, reporting, respect and courtesy.

Here are some "Rules of Engagement" that I've seen the best performing groups embrace.

## **PROFESSIONAL DEVELOPMENT:**

- We are committed to personal and professional growth. To that end, we all agree that:
  - Every group member must have, and be working on, a personal career development and skill-building plan: no cruising is allowed;
  - we will help each other in the group be the best that we can be;
  - we will ask for help from the team or other resources if "stuck" or falling behind;
  - we will be honest with any group member who is not pulling her / his weight; and
  - every member is expected to freely share their knowledge, experience, time, personal contacts, clients and talents.

## **WORK QUALITY:**

- No group member will work on matters that could be delegated to a more junior professional. If any client matter can be delegated, it must be.
- We will all remain focused on performance, not personalities; and accept constructive criticism and choose to learn from it.
- As team members we resolve to always pitch in, when and where necessary, to help fix problems and catch-up should any important matter get behind schedule.

- We are human; therefore, we make mistakes and we learn from them. We agree to be accountable for our own actions, behavior and choices. We will endeavor to avoid ever trying to blame things on others. We admit our mistakes.

### **INNOVATIVE COMMUNICATIONS:**

- We will always endeavor to be supportive of each other rather than judgmental. We will always promote an environment that is safe for participation, open communication and where group members don't have to fear criticism or retribution.
- We will listen with empathy, hear with understanding rather than being judgmental or defensive, willingly solicit and discuss ideas; and agree to love every new idea for at least five minutes. AND, in that same spirit we will:
  - before making a point, confirm to the group that we have understood the views of others by restating their point in our own words;
  - whenever we pose an issue or a problem, also try to present a solution or optional courses of action;
  - agree to not ever use "killer phrases" or negative body language; and
  - if need be, agree to disagree.

### **MEETING DECORUM:**

- All members are expected to attend the monthly practice group meeting - unless out of town, on vacation, ill or attending to an urgent client matter that cannot be postponed. If someone is not able to attend the meeting, he or she should inform the practice leader at least 24 hours in advance of the meeting date.
- Conduct is very important. We agree to avoid words and actions that create a negative impression on any individual, the group, or our objectives. We encourage debate and differing points of view, and we will do it with care and respect. Therefore, we all agree that:
  - we will notify the team in advance if we expect to be late;
  - we will use our time wisely, starting on time and ending our meetings promptly;
  - we will be present, both physically and mentally;
  - we will place phones and blackberrys on vibrate (instead of ring);
  - we will listen actively throughout the course of the discussions;
  - one person speaks at a time;
  - we will behave as a participant, agreeing to take initiative and volunteer ideas;
  - we will keep to the topic, avoiding side bar discussions while others are talking;
  - we will "park" discussion items that don't relate to the meeting's topic;
  - what is said in the room, stays in the room;
  - we will have fun, but not at the expense of anyone else's feelings;
  - all meetings will end with an action list identifying specific responsibilities; and
  - everyone agrees to be responsible for the success of our efforts and therefore is expected to help facilitate, critique, and evaluate each meeting.
- We expect to record the minutes of each meeting, clearly outlining the highlights, decisions and individual projects taken and that a minute taker (is a rotating task) will distribute the minutes within 24 hours of the meeting date.

## **PROJECT IMPLEMENTATION:**

- Any and all commitments must be made voluntarily, must be documented as to the expected deliverable or outcome, and accorded a clear and agreed to deadline date.
- Any and all commitments to complete a task or project on behalf of the group, once voluntarily made, must be treated as sacredly as any client promise.

## **SHOWING MUTUAL RESPECT:**

- The group owns all ideas and concepts – and we all agree to not talk disrespectfully about team members or activities in public.
- We take action instead of whining, positively work to inspire other group members, encourage others towards success, and avoid any “us versus them” language.
- We agree not to listen to or allow others to speak negatively about group members behind their backs.
- We ensure that any and all criticisms are made constructively with suggestions for improvement and using nonjudgmental language.

## **GROUP CELEBRATIONS:**

- We will strive to recognize and celebrate individual and team accomplishments; and at least quarterly identify in writing the progress that has been made toward achieving our goals.

To be effective, these rules of engagement must be clear, consistent, agreed-to (by total consensus), and followed. Any group should take the time to create and adopt some sensible written guidelines during its very first meeting. These should then be consulted at each meeting, added to and revised as needed.

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