Microsoft 365 + IDEO

The Art of Teamwork Toolkit

Collective identity
Facilitator guide

Activities and worksheets:

Values train	**60-90 min**

Bring values to life with agreements
and rituals that harmonize the team.

Feel-need-do map	**45-60 min**

Build on team agreements as the team
context shifts and changes.

What is collective identity?

A shared sense of belonging that builds cohesion and helps teams work as one.

Collective identity is about aligning, not conforming.

Collective identity is about creating experiences that reflect the team's shared values and agreements that bring the team together as one cohesive group.

More like:

Having a shared set of values the team aspires to uphold.

Less like:

Mandating certain behaviors.

Collective identity is about rituals, not meetings.

More like:

"After our weekly stand-up, let's go around and share one inspiring or fun story from this weekend."

Less like:

"After our weekly stand-up, let's meet just as the marketing team to go over more specific updates."

Collective identity

Activity 1 of 2

Values train

Translating the team's values into actionable agreements can help everyone recognize how values show up in the day-to-day work. This activity will guide the team to connect values to everyday agreements and rituals.

Facilitator instructions

The values train activity has four steps:

01 — Set the stage

02 — Guide a discussion

03 — Initiate a brainstorm

04 — Keep it going

Context

When the team needs to see its values connected to daily agreements and rituals, so there's greater cohesion and alignment.

Goal

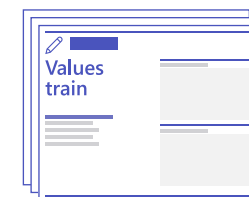Identify agreements and rituals to keep the team humming.

Time

60-90 minutes

Worksheet

Values train — pg. 8-10

Materials needed

Markers

Sticky notes

Values train
Facilitator instructions

01
Set the stage

Activate

When the team can see how its values show up in daily agreements and rituals, its sense of identity and cohesion can grow. This activity will get you there.

To get the team thinking, try these talking points:

- Creating team agreements and rituals help us align on who we are as a collective. These values drive our mindsets and behaviors.

- Our agreements and rituals need to be developed collaboratively. I'll be setting aside some time for all of us to share our thoughts about our values and how these values can show up every day.

Print worksheet

Print out the worksheet for each of your team members for this activity:

Values train — pg. 8-10

Values train

Prepare

Get ready to facilitate the values train activity with your team.

Here is a checklist:

☐ Before completing the group activity, invite the team to complete the first page of the values train worksheet. If prework isn't the team's thing, you can also complete it during the first 10 minutes of the meeting.

☐ Invite the team to a 60- to 90-minute meeting and reserve a room.

☐ On the day of the meeting, make sure you have a board or flipcharts and sticky notes.

☐ In the room, on the whiteboard or flipchart, create two columns:
1: As a team we're good at…
2: As a team we could be better at…

☐ If you have a remote team member, help them feel included by starting a Microsoft Teams meeting and sharing your whiteboard or camera.

Values train
Facilitator instructions

02
Guide a discussion

Reflect

Once the meeting has started, invite each member of the team to reflect on their responses to the first page of values train worksheet. It's important to let everyone share their responses to both prompts. If team members are uncomfortable identifying areas of growth, help them by naming things everyone can improve upon. After everyone has shared, open up the discussion.

Start with a few open-ended questions:

• What resonated most with you?

• What surprised you?

• Did any responses make you shift your point of view?

Synthesize

Now it's time to pause and invite the team to notice trends.

Here are some some tips:

• Within each column, are there any similarities?

• Do you notice any trends? Or duplicate responses? Identify the top three topics for each column.

• Are there any conflicting responses? For example, were some values listed in both columns as things the team is good at and things the team could be better at? Take note of these and bring them up in the group discussion.

• Record the top trends from each column on new sticky notes, and set them aside to share back with the group.

Values train
Facilitator instructions

03
Initiate a brainstorm

Tee up

Now that you've had a chance to reflect on the team's strengths and opportunities for growth, it's time to brainstorm values.

This time, use the second page of the values train worksheet. Focus the team's attention to the first column.

Generate ideas

First, invite the team to brainstorm its top values. As an example, does the team value commitment? Kindness? Authenticity?

Next, invite the team to brainstorm agreements and rituals that will help to keep this value alive. If the team values kindness, what's a ritual that would demonstrate daily kindness?

Try these talking points:

- Agreements are what we want to see within our team every day. For example, if our team had an agreement to be present, we might make a rule that we should limit our phone use during meetings.

- Rituals are repeated activities that reinforce our values. For example, if a company values putting the customer first, it may have a ritual of starting every meeting with a customer story.

Capture

Select the top 3-5 rituals and assign ownership.

Invite the team to be an "owner" of each chosen ritual. For example, if your team agreed to make a habit of sharing customer feedback at the start of each meeting, one person can become responsible for ensuring that happens. They can assign new members to share feedback or select it themselves.

Vote

Once the brainstorm is complete, ask everyone to vote on their top values. Record top values on a clean copy of page 2 of the values train worksheet.

Values train
Facilitator instructions

04
Keep it going

Revisit

As the team puts new agreements and rituals in place, it's important to revisit them over time. Find a recurring meeting to revisit new agreements and rituals.

Here are ways to keep the conversation going:

- Invite team members to reflect on stories where their rituals and agreements have shown up.

- Create opportunities for celebration and recognition when team members live out agreements and rituals.

- Create opportunities to question or revise rituals that no longer serve the team.

Revise

As teams change, so must rituals and agreements. The most important part of rituals and agreements is that they feel owned and shared across the team. Create opportunity for revision as the team changes.

Repeat

Agreements and rituals should be "living." Organizations change, teams change, and people change. Repeatedly revisit and revise the team's agreements and rituals to keep up with changing dynamics. Leverage recurring team rhythms, such as onboarding, quarterly meetings, or annual reviews.

✏️ **Worksheet**

Values train

Page 1 of 3

Bring values to life with agreements and rituals that harmonize the team.

Teams, just like individuals, have superpowers and opportunities for growth. By reflecting on both, you can begin to identify opportunities to strengthen the team.

As a team, we are great at...

As a team, we aspire to be better at...

✏️ **Worksheet**

Values train

Page 2 of 3

Team rituals and agreements are stronger when they are directly connected to a value the team cares about. First, think back to what you identified as team strengths. What values are behind those strengths? For example, if the team is great at keeping to deadlines, perhaps you have a value of timeliness and a ritual around reviewing deadlines at the start of every meeting.

List values that reflect both strengths and opportunities for the team. If you are stuck on how values translate to agreements/rituals, see the next page for a few examples.

Value	Agreement/ritual	Owner
→	→	
→	→	
→	→	
→	→	

✏️ **Worksheet**

Values train

Page 3 of 3

Examples

Value	Agreement/ritual	Owner
Rigorous experimentation	→ We always create an A/B test for things we are unsure about, and share those results with others to make the case.	→ Robyn
Make others successful	→ We kick off every stand-up by asking who needs help with something.	→ Julie
Radical candor	→ We provide feedback to each other at the end of each day.	→ Miha

Collective identity

Activity 2 of 2

Feel-need-do map

It's important to make sure agreements and rituals address commonly felt needs across the team. Use this activity to address key moments where new agreements may need to be created or other agreements may need to be revised.

Facilitator instructions

The feel-need-do activity has three steps:

01 — Set the stage

02 — Guide a discussion

03 — Keep it going

Context

When the team is stuck and needs to reboot with revised agreements and rituals.

Goal

Connect and revise team rituals and agreements by connecting them to key moments.

Time

45-60 minutes

Worksheet

Feel-need-do map — pg. 15

Materials needed

Flip chart

Markers

Sticky notes

Feel-need-do map
Facilitator instructions

01
Set the stage

Activate

Rituals and agreements should be connected to needs that are commonly felt across the team during key moments, such as product launches or quarterly reviews. This activity will help you surface needs connected to milestone events and create new rituals and agreements that help address those needs.

To get the team thinking, try these talking points:

• The rituals and agreements we have in place should help us perform our best.

• This activity will help us surface team needs in key milestone moments and generate new rituals that address these needs.

Print worksheet

Print out the worksheet for each of your team members for this activity:

Feel-need-do map — pg. 15

Feel-need-do map

Prepare

Get ready to facilitate the feel-need-do activity with your team.

Here is a checklist:

☐ You might invite them to reflect on key moments and needs, or feelings associated with them, in advance. If prework is not the team's thing, you can reserve the first 10 or so minutes of the meeting to do this. Make sure to leave the third column on rituals/agreements blank so the team can work on it together.

☐ Set aside time and space for a 45- to 60-minute meeting.

☐ If you have a remote team member, help them feel included by starting a Microsoft Teams meeting and sharing your whiteboard or camera.

Feel-need-do map
Facilitator instructions

02
Guide a discussion

Reflect

Kick off the conversation by letting the team know that there will be a brainstorm to review and refine agreements and rituals based on different experiences from across the team.

On a board, draw a horizontal line to reflect the team's journey throughout the quarter, year, or a time frame of your choice. Add a few starting points to jumpstart the conversation. Then, invite them to add to it.

Here are some guiding questions:

- What are big moments worth celebrating?

- What are some hectic, high-intensity moments?

- What moments require a new way of working?

Now, revisit each moment the team identified. Ask how they felt in this moment, and what they may have needed from others. Capture their responses.

Draft

For each moment, invite the team to create a new ritual or agreement that would help to address those needs. For example, if end-of-month administrative tasks typically fall on one person, perhaps a ritual of asking for help may emerge.

Vote

Once rituals have been surfaced, invite the team to vote on three to five new practices they feel would help to sustain them through the good and hard times.

Capture

Capture voted rituals in a new space and then send them back out to the team. You may think about assigning "ownership" to rituals; having someone champion them internally can be a good way to ensure they take flight.

Facilitator instructions

03
Keep it going

Revisit

As your team puts new agreements and rituals in place, it's important to revisit them over time. Find a recurring time to revisit new agreements and rituals and recognize milestone moments.

Revise

As teams change, so must rituals and agreements. The most important part of rituals and agreements is that they feel owned and shared across the team. Create opportunity for revision as the team changes.

Repeat

Agreements and rituals should be "living." Organizations change, teams change, and people change. Repeatedly revisit and revise your team's agreements and rituals to keep up with changing dynamics. Leverage recurring team rhythms, such as onboarding, quarterly meetings, or annual reviews.

✏️ **Worksheet**

Feel-need-do map

Connect needs from key moments to new rituals and agreements.

Define key moments from the past quarter, year, or a time frame of your choice. Record what you felt and/or needed at that time. Finally, the last step is to brainstorm rituals or agreements that could better support the team in these moments.

Key moments   **Feel/need**   **Rituals and agreements**

→   →

→   →

→   →

→   →

Example

| A new team member joins | → | Newbie needs to know about the work. Manager feels pressure to teach everything. | → | Distribute the onboarding process. Tag different members to perform a common set of onboarding activities. |