

FREE SAMPLE

# TEAM HABITS

How Small Actions  
Lead to Extraordinary Results

**CHARLIE GILKEY**



NEW YORK

# PRAISE



“*Team Habits* is focused on what busy entrepreneurs need: a practical, ethical and actionable roadmap for scaling your business with a team. Charlie synthesizes complex challenges of team management into solutions that will lead to increased profits, while centering the humanity of everyone in the organization. This is the modern business handbook that should sit on every founder’s desk.”

– Pamela Slim, author, *Body of Work* and *The Widest Net*



“When so many workplaces struggle with firmly established norms and limitations, *Team Habits* is an instruction manual to stop fixating on the things you can’t change while overlooking the stuff you can change right in front of you.”

– Captain D. Michael Abrashoff, New York Times bestselling author of *It’s Your Ship*



“Charlie Gilkey’s *Team Habits* offers a compelling roadmap that can help any group find a path to higher performance. By addressing the small but critical behaviors that shape our daily interactions, this book equips leaders to cultivate an environment of productivity and purpose.”

– Daniel H. Pink, #1 New York Times bestselling author of *The Power of Regret*



“*Team Habits* is a vital tool for any leader to guide the path toward shared expectations and language so that the organizational culture is not only successful but responsive to today’s workforce challenges. There’s not a single person who works with groups of people – formally, informally, professionally, in a volunteer capacity – that wouldn’t benefit from this book.”

– Liana Cassar, women’s leadership advocate and former RI State Representative

“*Team Habits* is success-critical reading for every leader! Packed with practical, actionable insights, tools and strategies, with a unique focus on habits that build belonging and fuel performance, Gilkey has created an essential reference for those to aspire to collective greatness.”



– Jonathan Fields, Bestselling author of *SPARKED*, founder of Good Life Project®

“You can calm chaos at work, but it starts with a reality check from Charlie Gilkey, delivered with his signature wit and generosity: You might not have a team problem, you have a you problem. Stop catering to air sandwiches, Crisco watermelons, broken printers, ghost plans, and other corrosive practices, and start implementing Charlie’s finely-tuned, road-tested systems instead. *Team Habits* offers a robust blueprint to transform your team workways step-by-practical-step. You will never work the same way again, and that’s a good thing.”



– Jenny Blake, podcaster and author of *Free Time, Pivot*, and *Life After College*, and co-creator of Google’s global drop-in coaching program Career Guru

“*Team Habits* is the book I’ve been waiting for. It is an elegant, easy-to-read, and near-comprehensive catalog of the elements of teamwork. If you want to make your team or organization be more effective, efficient, and inclusive, this book is essential reading.”



– Bob Gower, Organization Designer and Author of *Radical Alignment*

“Leaders make no bigger decisions than who they select to be on their team and who they allow to remain on their team. If you want to lead that team to a special place, Charlie’s very palatable wisdom in *Team Habits* will help you guide them there.”



– Bobby Herrera, Author of *The Gift of Struggle* and CEO/Co-Founder of Populus Group

# CONTENTS

<b>ONE</b>	<b>WE NEED BETTER TEAM HABITS NOW MORE THAN EVER</b>	<b>1</b>
	Sometimes It's Not a Printer	4
	What Are Workways?	6
	Why Start with Teams?	7
	Teams Are Where We Experience Belonging	8
	How 3 Percent Shifts the Culture	9
	Use My Hard-Won Lessons	11
	Accept the Unwanted Gifts of VUCA and COVID-19	14
	What Are You Going to Do about Your Broken Printers?	16
	How to Read This Book	19
	Who This Book Is For	20
<b>TWO</b>	<b>WE LIVE AND BREATHE TEAM HABITS</b>	<b>23</b>
	Moving Mountains Is Hard; Moving Stones Is Easier	24
	The Eight Categories of Team Habits	29
	Framework: Five Whys and Fishbone Analyses	33
	Pick Your Starting Point	34
	Building Better Team Habits Isn't Rocket Science— It's Rocket Practice	38
	Team Habit Assessment	40

<b>THREE</b>	<b>BELONGING</b>	<b>45</b>
	The Power of Belonging	46
	Framework: The Tuckman Team Development Model	49
	Put Your Values on the Floor, Not the Wall	50
	Rocket Practice: Walk Your Values	51
	Harness the Strong Power of Weak Ties	51
	Rocket Practice: Invite Our Full-Spectrum Selves to Work	57
	Be Intentional about Inclusion (and Exclusion)	57
	Rocket Practice: Make Room for Work Preferences	60
	Acknowledge Bumps to Make Them Less Personal	60
	Rocket Practice: Manage Bumps	62
<b>FOUR</b>	<b>DECISION-MAKING</b>	<b>63</b>
	How Does Your Team Make Decisions?	64
	Framework: RACI	65
	Remove Decision-Making Bottlenecks	66
	Rocket Practice: Remove Decision-Making Bottlenecks	71
	Democratize Decision-Making	72
	Rocket Practice: Democratize Decision-Making	77
	Make Better Decisions as a Team	77
	Rocket Practice: Make Smarter Team Decisions	81
	Are Maybe Decisions Problematic? Maybe	82
	Framework: Known Knowns, Known Unknowns, and Unknown Unknowns	83
	Rocket Practice: Address Maybes	85
<b>FIVE</b>	<b>GOAL-SETTING AND PRIORITIZATION</b>	<b>87</b>
	How Ready Is Your Team?	88
	Framework: Dunkirk Spirit	89
	Framework: Cone of Uncertainty + Tuckman’s Stages of Group Development	90
	Choose Pull Goals over Push Goals	91
	Rocket Practice: Convert Push Goals to Pull Goals	97
	Turn Goals into Priorities: The TEAM Cost of Every Goal	97

	Rocket Practice: Make Goals Priorities	103
	Leave Room for Failure	103
	Rocket Practice: Make Room for Failure	105
<b>SIX</b>	<b>PLANNING</b>	<b>107</b>
	Make Planning Everyone’s Job	108
	Rocket Practice: Teach Every Team Member How to Plan	109
	Poor Planning Produces Poor Performance	109
	Rocket Practice: Get Everyone on the Same Page	114
	Create a Timeline	114
	Rocket Practice: Make Better Timelines	118
	Avoid Strategic-Routine-Urgent Logjams	118
	Rocket Practice: Clear the Logjams	124
	Celebrate the Voice of No	124
	Rocket Practice: Designate a Voice of No	126
	Normalize That Plans Are Made to Be Changed	126
	Rocket Practice: Create More Flexible Plans	129
<b>SEVEN</b>	<b>COMMUNICATION</b>	<b>131</b>
	Too Frequent or Too Infrequent?	132
	Too Much or Too Little Detail?	133
	Too Focused or Too Broad?	134
	Too Afraid or Too Courageous?	134
	Rocket Practice: Tuning the Dials	136
	Rocket Practice: Communication Cadences	138
	Craft Clear Communication	139
	Rocket Practice: Reduce the Chatter	143
	Use Shortcodes to Increase Communication Speed and Clarity	143
	Rocket Practice: Develop Shortcodes	146
	Be Intentional and Consistent with Communication Mediums	146
	Rocket Practice: Create Your Medium Map	149

<b>EIGHT</b>	<b>COLLABORATION</b>	<b>151</b>
	Who's on Your Team?	153
	Framework: TIMWOOD	157
	Rocket Practice: Troubleshoot Team Composition	159
	Open the Black Box	159
	Rocket Practice: Teamwork in Team Channels	164
	Create the Team Habit of Forming Ad Hoc Project Teams	165
	Rocket Practice: How to Stand Up a Team	167
<b>NINE</b>	<b>MEETINGS</b>	<b>169</b>
	Meeting Math	170
	Rocket Practice: Audit Your Meetings	177
	Build Better Meetings	177
	Rocket Practice: Build Meeting Templates	184
	Make the Default “No Invite”	185
	Rocket Practice: Why Am I at this Meeting?	187
	Capture Next Steps	187
	Rocket Practice: Define Next Steps	188
<b>TEN</b>	<b>CORE TEAM HABITS</b>	<b>191</b>
	Show Your Work	192
	Rocket Practice: Start Showing Your Work	194
	Use Focus Blocks to Get Real About Your Capacity and Prioritization	195
	Coworking Focus Blocks	199
	Rocket Practice: Audit Your Focus Blocks	202
	Shoot, Move, Communicate	202
	Rocket Practice: Shoot, Move, Communicate	205
	Eliminate Your Achilles Heel by Illuminating It	205
	Rocket Practice: Create an Achilles Heel Map	207
	Learn How to Help Your Teammates When They Fall Behind	207
	Rocket Practice: Support Teammates	210
	Give Direct Feedback	210

	Rocket Practice: Giving Direct Feedback	212
	Performance—Belonging	213
<b>ELEVEN</b>	<b>TEAM HABITS ARE POLITICAL— SO PLAY THE GAME</b>	<b>215</b>
	Who’s the Champion?	217
	Rocket Practice: Choose Your Champion	219
	Who Stands to Lose?	219
	Sell the Problem	222
	Rocket Practice: Build Empathy	224
	How to Enroll the Disengaged	225
	What If They Used to Be Engaged?	227
	Rocket Practice: Enroll Your Teammates	228
<b>TWELVE</b>	<b>CREATE YOUR TEAM HABIT ROADMAP</b>	<b>229</b>
	Start Small and Ratchet Up	230
	Rocket Practice: Pick Your First Habit	232
	It’s a Marathon, but Think in Sprints	232
	Rocket Practice: Break Down Your Project	234
	How Will You Track Progress?	234
	Rocket Practice: Report on Progress	236
	Expect Setbacks and Positive Surprises	237
	How to Deal with Setbacks and Downstream Effects	240
	Rocket Practice: Expect the Unexpected	240
	Know When to Hold ’Em, Fold ’Em, or Walk Away	241
	Rocket Practice: Navigate the Stall	244
	How to Know When You Are Really Done	244
	Rocket Practice: When to Move On	246
	<i>Acknowledgments</i>	249
	<i>Recommended Reading</i>	251
	<i>Glossary</i>	255
	<i>Notes</i>	259
	<i>Index</i>	263





## WE NEED BETTER TEAM HABITS NOW MORE THAN EVER

*If you do not change direction,  
you may end up where you are heading.*

—LAO TZU

“I’m at my wits’ end, Charlie! This project ended up back on my lap, even though two months ago, I told the team I was concerned that this would happen, and they were, too. Now I can’t get to my real strategic work because I’m doing their work!”

“Oof, it sucks when you see the train coming and you still get hit by it.”

“Right?! I can’t figure out why this keeps happening. Why can’t they just . . . do it?”

“They’re all smart, experienced, and committed to the goal, right?”

“Yes. That’s what makes this so hard!”

“Okay, so what we’re dealing with here is a broken printer.”

“Huh? What’s a broken printer have to do with this?”

□ □ □

“I’m so burned out, Charlie! I spend all day answering questions, approving things that don’t need approval, and reminding people what we talked about. The only way I’m keeping my job is that I get up three hours earlier to do my work before the team gets online.”

“That’s rough. Is this a recent thing, or has it been going on for a while?”

“I’ve been here two years, and it was this way when I got here. No matter how many conversations I have, they roll back in the next day with more questions.”

“Got it. What we’re dealing with here is a broken printer.”

“Uh . . . I don’t think you understand. We work remotely, and this has nothing to do with printers.”

□ □ □

“I can’t get my best work done, Charlie! As soon as I get to work, I’m in meetings most of the day, and when I’m out of meetings, I have to catch up on Slack threads to make sure I haven’t missed anything.”

“Yeah, it’s hard to do any of your best or deep work when your schedule looks like Swiss cheese. I’m curious: Is it this way just for you or for others struggling with the same thing?”

“It’s all of us! It seems like every other meeting or Slack thread, we talk about how many meetings we have or how we’re behind on Slack.”

“Hmm. Seems like we’re dealing with a broken printer, then.”

“You’re such a Boomer, my dude. Nobody prints stuff anymore.”

□ □ □

I have conversations like the ones above every day with clients, readers, and students. Yes, I do get teased about being a Boomer even though I’m on the threshold between Gen X and Millennial, and yes, I do find it hilarious.

And I do end up unpacking what I mean by “broken printer.” Every team has them—including yours. It’s probably why you picked up this book. So what’s a broken printer?

Every organization I’ve ever worked at or consulted with has had a literal broken printer that everyone knows about but no one fixes. You know the one.

It’s the printer that leaves a streak down the page, which is fine for a team meeting agenda but not when it’s time to provide a printout for the Big Boss or a customer.

Or the printer that randomly eats paper or needs the special kind of paper that never seems to be in stock.

Or the one that’s downstairs in the office manager’s office, but she’s always in meetings and by the time she’s out, the team has to figure out which printout belongs to who.

Or the one that has a passcode people can never remember or that always needs to be reprogrammed.

Or the one sitting on someone’s desk, in a closet, or on the unused extra chair in the corner of the conference room.

There’s *always* a broken printer. It may not seem like a broken printer is a big deal until you look at the downstream effects. Because the printer’s broken:

- Teammates are rushed and frazzled in front of the Big Boss or customer because they had to scramble to reprint everything after the printer left that ☹️ streak.
- The paper budget for the office is always over because of that special kind of paper.
- The IT department (aka Liz) has to stop what they’re doing to fix the printer seven times a week, costing them—and everyone else—time.
- People are distracted during meetings because they’re looking at agendas and docs on devices rather than printed agendas and review copies. Whatever’s being discussed has to compete with notifications, emails, and inadequate screen sizes.

- Someone always has to roll another chair into the conference room, adding another five minutes of work before the meeting or creating a “wait for Taylor to get settled in” awkward start to the meeting.

Each small downstream effect from the broken printer may seem insignificant. But when multiplied by how frequently these small effects occur, they lead to massive waste, inefficiency, and demoralization.

*The Progress Principle* by Steven Kramer and Teresa Amabile<sup>1</sup> showed that the frequency of small setbacks and frustrations plays an outsized role in a team’s morale and engagement. The grumbling, exasperation, and “keep it together before I lose my shit” moments that are happening because of the broken printer become part of the emotional labor of your daily work.

But here’s the deal: **For most teams, it would cost less than \$500 to replace the printer.** It might even just be a matter of noticing the printer in the corner and getting rid of it. Thousands of dollars in wasted team hours and daily #FML moments are hinging on a \$500 decision or fifteen-minute action.

The broken printer isn’t a big deal; what it causes and why it’s not being addressed are *huge* deals. We can call a meeting that costs the organization twice what replacing a printer would without thinking about it, but the broken printer is an intractable problem?

Interesting.

The broken printer is a symptom of root-cause team dynamics that we’ll discuss shortly, but in case your work hasn’t been disrupted by a broken printer, don’t worry—it’s not *really* about printers.

## **SOMETIMES IT’S NOT A PRINTER**

I’ve been talking about *actual* printers because the pattern of broken printers is near ubiquitous, tangible, and easy to understand for those of us who’ve been in the workforce for a while, which makes the broken printer a perfect shorthand for all those small and fixable breaks in the ways we work with each other.

But plenty of broken printers aren't literally printers. For instance, one of my executive coaching clients recently found out that one of her organization's mental health therapists hadn't been able to see her patients for the previous three months because she was missing an \$8 computer cord.

Not even considering the many thousands of dollars my client's organization had spent on the therapist's salary, the therapist wasn't serving her patients during the COVID-19 pandemic—exactly when many of them were struggling with their mental health. The therapist's manager had known she needed a cord for three months, as had the IT department. It was only during a meeting called because of inaccurate financial reporting that this came up.

Yes, an \$8 cord. Rest assured that my client made sure the therapist had her cord the day we talked about it.

A broken printer doesn't even have to be a physical issue. Take the CC Thread from Hell. Untold hours of many people's days are spent reading email CC threads trying to figure out how—or whether—they're relevant. The same pattern has moved to group chat tools such as Slack with overmentioning groups and channel bombing. Most of us know it's a problem, but no one is doing anything to fix it.

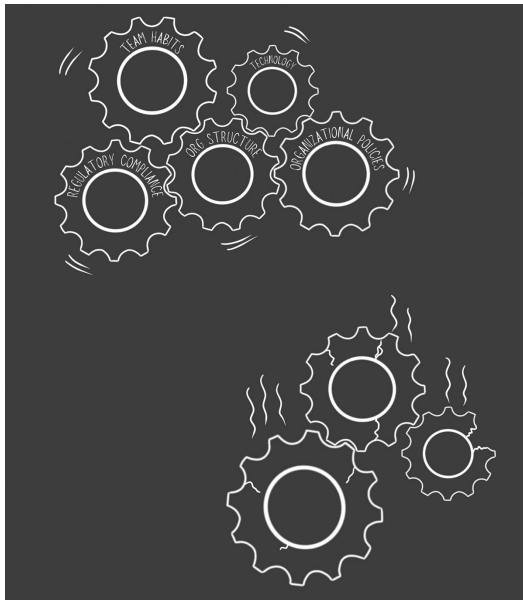
Or maybe your broken printer is the “choose your own adventure” way that teammates give each other tasks: Some use email, some text, some Slack; others call meetings; and a rare few actually task people in the team task management app. People need to look in seven different places for incoming tasks and hope they catch them all.

Or maybe it's requesting permissions on collaborative documents several times a day. It's not clicking the button to request permissions that's the biggest annoyance. It's being stuck while waiting for thirty minutes, a few hours, or until the next day for the document owner to come back around. And let's not even get started about how many times we've been left hanging with permission fails when someone goes on vacation.

Just as the physical broken printer doesn't have to remain broken, these ways of working with each other—what I'll call *workways*—are all fixable.

## WHAT ARE WORKWAYS?

Our workways are determined by a mix of our team habits, organizational policies, technology, regulatory compliance, and org structure. Each of these creates a system, and, as in any system, changes or effects in one of them can change or create effects in other parts. These workways can support our work if they're healthy, or they can get in the way if they're broken—and not addressing broken workways is a choice.



For this book, I will be focusing on the subset of workways around team habits because they're the universal subset of workways that we all participate in and can change. Just as we have personal habits that may be good or bad, every team has habits that support the work or get in the way. And just as with personal habits, it's possible to identify the bad ones and shift them into something more positive.

I want to make this point clear: **No matter your role in the company, you have the power to change your team's habits.** And improving team habits can be a lever to make changes in other, more intractable workways.

We can all change team habits, *and* that doesn't mean we all have the same power to do so or that the weight of other workways won't be

working against us. Many of us work in rigid hierarchies or in workplaces that are riddled with thorny group dynamics. Many of us are from backgrounds that mean we'll be fighting implicit biases within our organization or the greater culture. Many of us are in industries with heavily ingrained norms and structural limitations.

That said, we can spend time grimacing and complaining about things that we can't change or are not well positioned to change while overlooking the stuff we *can* change right in front of us. Railing against macro workways like your industry's norms doesn't do much to solve the way those norms influence your team habits. Since you're going to have team habits regardless of what's happening in your industry, you're better off acknowledging those industry norms and getting busy with changing your team habits *today, where you are*.

In a world where most leadership, teamwork, and change management books focus on lofty ideas, the future of work, and grand strategies, I'm proposing something simple and mundane: If you want your team to work better, focus on your team habits.

## **WHY START WITH TEAMS?**

You'll no doubt notice that I've started this book talking not about people but about broken printers and team habits. It may seem counterintuitive that a book about building better teams doesn't start with people, but it's by no means an accident. Countless books focus on changing people to make better teams—whether that's improving the manager or empowering individual contributors or upskilling leaders—but the usual result is that the team and organization basically stay the same.

Teams are made up of people, though, so it's helpful to understand that most people

- Are intrinsically goal-oriented. That doesn't mean that we're necessarily ambitious, but our basic wiring is such that we seek to avoid pains and secure gains.

- Want to be liked and in good relationships with other people. Again, basic human wiring here; we're inherently a cooperative species.
- Enjoy getting stuff done. While this may seem to be the same thing as being goal-oriented, it's not. This one's more about our emotional states vis-à-vis task completion versus our mental states around goal orientation.

No one wakes up in the morning and says, "You know what? I'm going to screw over my team today and not get anything done." No one except sociopaths or someone who's been pushed over an edge, that is.

That leaves us with a mystery. If people are inherently goal-oriented, relationship-minded, and completion-motivated, working in teams should be much smoother and easier than most people report. Furthermore, if we address team problems as if they are people problems, we're starting with the assumption that at least one of the members of the team doesn't have basic human wiring.

**If teams are working well or poorly, it's not really about the people in the team. It's about how they're working together.** Teams are the fundamental value-creation unit of businesses and organizations. Individuals alone don't create value—it's the interactions of individuals with each other that create value, whether that value is results, innovation, revenue, goods, services, or experiences. The value creation of teams is what differentiates the Disney World experience from a lone busker on a street corner wearing a Mickey Mouse suit.

But, to me, the most important reason to focus on teams is this:

## **TEAMS ARE WHERE WE EXPERIENCE BELONGING**

We've all heard the quip that people don't leave bad companies, they leave bad managers. There's some truth to it, but I think it misses the mark because it places the emphasis on the manager rather than on the team habits that allow bad managers to remain in power.



What it rightly points out is that people quit or stay because of the people they interact with daily. No matter the size of the organization, most of us spend 80 percent of our work time with the same four to eight people. These people are our true team, regardless of what the org chart says.

And it's in this team that we experience belonging—or the opposite. Most of us have had the experience of sticking through a bad work experience because of our team; if it weren't for them, we would've flipped the table and walked out a long time ago. We've also experienced the feeling of having the good work we're doing soured by a frustrating or toxic environment created by a poorly functioning team.

That's the power of teams.

With a strong team, we have an incredible amount of rapport, influence, and can-do attitude. If our meetings suck, we can change them. If we want to come up with a different way of talking about goals, we can do it. If we want to cover for each other, we can come together and figure out how.

**And if we make our team's work life better, we make 80 percent of our work life better.** When our team's life becomes better, our sense of belonging goes up, making us even more invested in sticking with the team and making things better.

That's the power of teams, too.

Throughout this book, when you read something that makes you want to shake your fist at all the things you can't change at work, remember that what we're talking about is improving your team's belonging and performance, not the entire organization's.

But it turns out that focusing on your team is often the best way to change the organization.

### **HOW 3 PERCENT SHIFTS THE CULTURE**

We think that change comes from the top, but the reality is that two-thirds of all top-down organizational change projects fail.<sup>2</sup>

Top-down change projects are tricky undertakings, in part because getting groups of people to change behavior is less about inspiring them

with visionary ideas than about translating those ideas into everyday habits that everyone participates in.

**But it turns out that a relatively small percentage of a culture or organization—as small as 3 percent—can shift the rest of the culture or organization they belong to.** Nassim Nicholas Taleb writes convincingly about this in his book *Skin in the Game*,<sup>3</sup> where he suggests that within a complex system, it takes only “three or four percent of the total population, for the entire population to have to submit to their preferences.”

While we might not live in a truly meritocratic culture, our culture does value what works. When one team starts outshining other teams, people at all levels of the organization take notice. The team’s peers notice; studies suggest that employees learn more from their fellow employees than from higher-ups or managers.<sup>4</sup> And the better that team performs, the more likely it is that the organization’s managers and leaders will start trying to figure out what’s working.

Sure, they’ll start by focusing on the *people* of the team and attributing their success to them. But, as I’ve argued above, it’s not about the people per se. It’s about their habits.

Organizational culture can be defined as a shared set of values, goals, attitudes, and practices that make up an organization. Team habits are the practical component of culture; while values, goals, and attitudes are important, when it comes down to it, *what we do as a collective is who we are as a collective*.

Changing our habits can be an incredible lever for changing our organizational culture. Continuing with our existing habits reinforces our current culture. If you don’t like your organization’s culture, then you have to change its habits.

**To continue running the same habits is only to reinforce the culture.** The single best way to shift your organization is to shift your team. And the single best way to keep your team together is to show that it’s not the members of the team as much as it is the team habits—and *those* can be replicated across the organization fairly quickly and with minimal heartbreak and personnel disruption.

The power is in your hands.

Improve your team's habits. Get some points on the company scoreboard. Invite people from outside your team to join a project to see how it's done. Get yourself invited to join their projects to help them do them better.

*That's* how you can change your organization, if that's what you're out to do. It's not quick, it's not a one-time deal, and it's not easy.

## **USE MY HARD-WON LESSONS**

Before we get into the nuts and bolts of team habits and how to change them, you might be wondering who exactly I am and what I know about effective teams.

I've been involved in the art and craft of leadership for the last three and a half decades, getting an early start in the Boy Scouts leadership program and growing up in an Army family. I was leading and teaching when I was a teenager and haven't strayed far from it since, despite my efforts to the contrary.

My most formative and intense leadership experiences came from my service with the US Army and Army National Guard in the 2000s. I deployed in support of Operation Iraqi Freedom as a transportation platoon leader and, while deployed, was reassigned to higher headquarters as the battalion plans officer, battle captain, and primary investigator during after-action reviews for convoys that were ambushed or experienced significant events such as accidents.

In the first two roles, I spent a lot of time ensuring that convoys were prepared and ran smoothly. In the latter role, I detailed what had gone wrong so that I could formulate and relay tactics, techniques, and procedures (TTPs) that were then spread throughout the theater of operation. One of the convoy ambushes I investigated was the most complex convoy ambush of Operation Iraqi Freedom.<sup>5</sup>

Once I redeployed, I was executive officer (second in charge) of my unit, which became the fastest unit to finish its redeployment and resume stateside operations. During this time, I also took on a special duty assignment to train joint and international units on how to conduct

tactical convoy operations, using my in-theater experience and TTP knowledge. After this assignment, I was given company command of a redeploying unit and subsequently beat the redeployment record I had helped achieve in my previous unit.

Just as significant as what my units were achieving was what they were going through at the time. The commander of the unit I deployed with was relieved while in theater, and the unit I took command of state-side also had its commander relieved. Thus, in the mix of high-tempo operations and transitions, I was also in the midst of rebuilding leadership teams and company cultures.

It was an intense six years of learning to fix the plane while flying it.

Through it all, I kept noticing a pattern: **The most successful leaders and units were the ones that focused on what many would see as the minutiae.**

While I was fortunate to have great sergeants and junior officers in my units, some of the most important things I did were the simplest: I ensured that troops got paid on time, that their administrative requests were attended to, that I didn't step into my sergeants' lane (and that my officers didn't, either), and that I did my job of interacting with our battalion and higher headquarters so my troops could stay focused on their mission with as little interference from higher headquarters as possible. I also learned the cost of leaders hoarding information and micromanaging everything.

Toward the end of my military career, I began blogging and teaching about productivity, planning, leadership, and entrepreneurship at Productive Flourishing. What started as a way to explore my personal challenges as I worked toward completing my PhD in philosophy while managing my Army career and life turned into a coaching and education business. My graduate work in ethics, sociopolitical philosophy, and human rights immersed me in what creates the conditions for personal and social thriving and, apparently, gave my approach to the topics a richer spin for a lot of people.

Along the way, people started asking me to advise them on their leadership challenges. I've been an executive and business coach since 2009,

with more and more of my work skewing toward executive coaching, strategy execution consulting, and workplace consulting for scale-ups and organizations since 2014.

I'm also actively engaged in the nonprofit and philanthropic communities, serving on executive committees of organizations that are solving root-cause challenges such as education inequities. Board and nonprofit service keeps me fluent in collaborative leadership and is a great complement to the directive leadership contexts of military service and entrepreneurship.

Today, my team at Productive Flourishing ranges from ten to thirty people, depending on how you count and the projects we're working on, so I stay in the mix of leading and managing a continually evolving team. Counterintuitively, leading Team PF is far more challenging than any of my previous leadership experiences, even including leading tactical convoy operations. Over the past fourteen years, I've had ample time to practice, experiment, fail, and iterate with my own team.

I want to be explicit that I'm not trying to guide the re-creation of the militaristic/hierarchical species of organizations that were seminal for me. Ironically, it was the defects of those kinds of organizations that led me to explore how to transform them.

You should've seen the horror and response of my sergeants when I discussed having upward and/or 360-degree feedback for *all of us* so that we could become better leaders—this was decades before Kim Scott's *Radical Candor*.<sup>6</sup> I was a lieutenant at the time, so I knew to pick my battles, but the inquiries I took away from that experience led to the way we do “performance reviews” at Productive Flourishing (which include the owners being in the support/hot seat) and how I think about 360-degree feedback for my executive clients.

I share the above not to brag but to give you a sense of what grounds the perspectives I'll be sharing in the book. The different contexts and sheer volume of cases I've seen throughout the decades continue to show the same patterns: **The delight of teamwork is in small day-to-day interactions that lead to wins and belonging.** Of course, the devils are there, too, in the broken printers and small broken promises we experience daily.

## **ACCEPT THE UNWANTED GIFTS OF VUCA AND COVID-19**

The truth is, we've all gone through a crash course in change management over the past few years. That's one of the gifts of our current VUCA environment and COVID-19.

VUCA is an acronym that emerged from military education and theory in the '90s. While military strategists framed it in the context of military scenarios, they were describing the state of the world that was emerging quickly.

The four elements of VUCA are volatility, uncertainty, complexity, and ambiguity.

It seeped into civilian leadership and strategic conversations in the 2000s as the Internet and rapid pace of change caused by technology made the world even more VUCA. The insight and enduring power of the VUCA paradigm are that leading and working in a VUCA environment are fundamentally different than leading and working in a “stable” environment. The classic principles of leadership, management, and work that we've read and been taught either don't work or need to be approached dramatically differently.

Understanding the VUCA paradigm also helps us embrace the dynamism of team habits.

- What works this quarter may not survive into the next (volatility).
- Our business or organizational models are likely to change, but we don't know how or when (uncertainty).
- Small changes in one aspect of our team or organization will create changes elsewhere (complexity).
- What we thought was signal may be noise, and vice versa (ambiguity).

We thus have to live in the tension of doing the best we can to create consistency, clarity, simplicity, and coherence—the opposite of VUCA—all the while knowing that VUCA is the gravity of the work world we live in. And, for those of us who are possibiliterians, the VUCA environment provides a lot of opportunity to experiment with, change, and

address workways that weren't working before VUCA times and aren't now, either.

As if the VUCA world we live in wasn't enough, COVID-19 changed the world of work irrevocably.

COVID-19 shredded almost all our existing habits. We went from remote working being something some companies were trying to the default way many of us worked. People who hated virtual meetings had no option but to show up for them. Social processors who normally found outlets with coworkers during coffee breaks suddenly had to figure out how to ask for brainstorming or sound-boarding sessions. Many of us who had learned to work without our kids, partners, and pets around found that working from home *with them* was more work than we were being paid to do. And a host of bonding activities based on physical proximity were taken away. Many of us still haven't found substitutes.

Still, there are three major upshots of the massive disruption to workplaces that COVID-19 caused:

1. It exposed a lot of habits that had been invisible. As I'll show, good team habits have a way of becoming invisible and bad team habits come to be accepted as normal. We couldn't "see" them until we were removed from our normal work context, in much the same way that we can't see our own homes until we come back from traveling.
2. We didn't feel that we had an option to change them before. But because so many of our team habits were contingent on working a certain way that we no longer could, the disruption created both the opening for change and the necessity for it.
3. We learned that, yes, we can change our existing team habits and create new team habits. Team habits and workways weren't something we merely had to participate in but rather were ways of working with each other that we created and maintained. That means we could re-create them as well as merely participate in them.

Turns out you don't need a pandemic to create a better new normal—it just did the work of beating inertia for us.

Since we have to create a new normal, how can we make a better new normal? After all, we're going to be creating new team habits anyway, so why not think about what habits will create more belonging and better performance?

I've been posing the following question to my clients, my team, and the nonprofits I'm engaged with.

### **WHAT ARE YOU GOING TO DO ABOUT YOUR BROKEN PRINTERS?**

Perhaps you just said, “Charlie, with everything going on, we don't have time to work on the small things. The broken printers just aren't a priority.”

Fair enough. Are you willing to look your teammates in the eye and say that out loud, though? Because you're really saying, “Fixing the things that would enable us all to work better together and be happier at work really isn't a priority.”

Actually, don't worry about saying it out loud—your actions already are.

As I write this in 2022, many of us have lost the zeal for change that we might have had two years ago. We've adapted, pivoted, and readjusted ourselves into burnout, and now we're looking for some constancy in a world that's been extra VUCA lately.

At the same time, there are still plenty of broken printers sitting around. Some may have been there prior to the big shift; others were likely caused by it. The question is not whether they're there but whether you and your teammates are ready to fix them.

There are two inevitabilities when it comes to team habits: You're already participating in them, and they will eventually change—though not necessarily for the better. As management consultant Peter Drucker said, though, “The only things that evolve by themselves in an organization are disorder, friction, and malperformance.” If positive change were automatic, we wouldn't have broken printers and CC Threads from Hell.



Changing broken team habits requires time and focus. **But if the prospect is daunting, remember that—one way or another—you’re going to be participating in team habits, and change is inevitable.** I hope you’ll choose to participate in them with intention and a goal to make things better.

Or maybe you’ve said, “Charlie, I’m not a manager or senior leader. The broken printer makes me crazy, but what can I possibly do about it?”

I want us to abandon the assumption that change management is a concern only for managers, senior leaders, and the consultants they hire to facilitate it. I want us to democratize change management in the same way that lean thinking democratized manufacturing and operations; one of the key insights from the lean paradigm is that the best ideas often come from the people closest to the work.

No matter your role, you’re closest to your work and how your team works. A lot that happens in your team, like Vegas, can stay in your team and not require outside approval or resources. Most of the changes we’ll discuss in this book can be made without the permission of anyone but the people on your team. Your team already has habits; we’re going to discuss making changes and substitutions to what you’re already doing.

Being the person who’s closest to your work and how your team works gives you a major responsibility. **You’re either participating in broken team habits or you’re working to change them.**

From here on out, you can’t just go to work anymore. Every day you go to work, you now have to ask whether your team’s habits support your team’s performance and belonging. If they do, build on them. If they don’t, fix them.

You’re already involved, anyway.

The real problem is that making these kinds of team changes has been relegated to managers and leaders, and there’s just not enough decision-making and management bandwidth to go around. But what if we change that paradigm and make doing this work as simple and expected as calling a meeting?

Over the last twenty years of leading Army units, building teams, coaching executives and entrepreneurs, and serving on nonprofit boards,

I've seen what happens when teams improve their habits and team members own their relationship with each other. I've seen what happens when leaders remove barriers and stop forcing change from the top down, instead bringing everyone into the process. **Spoiler alert: Belonging and retention improve, teams start performing better, and people actually want to show up to work with each other.**

Turns out, it doesn't have to be the case that Gallup's employee disengagement statistics are so consistently alarming. The reason people are so disengaged isn't because of their innate dissatisfaction with work; it's because organizations are fine with letting broken printers stay broken.

What we will be exploring throughout this book is how fixing broken printers and improving team habits can be woven into the myriad other decisions and conversations your team is *already* having.

Here's what I want you to think about.

- If you're a senior leader: How many broken printers are sitting around your organization? What's it costing you in performance and morale? Why do they remain broken?
- If you're a manager or team leader: What's keeping you from fixing your team's broken printers?
- If you're an individual contributor: How have you engaged with your team and manager to fix the broken printers you struggle with every day?

If you're not a mix of constructively frustrated and inspired to fix the broken printers that you, your team, and your organization struggle with every day, please put this book down. It won't be for you.

If you're a leader or manager and have checked out on making things better for your team, please put down any sense of entitlement and privilege about being in your position, too, as you're no longer earning them.

If your team's consensus is that you're not ready to engage with your team habits, great! You can all stay focused on what matters more to you, understanding that your inevitable conversations about team habits are venting sessions more than problem-solving conversations.

But if you're ready to engage with your team habits and improve your, your team's, and your organization's lives and work, let's not wait for another pandemic, massive external shift, or internal crisis to get after it. It's much easier to play with team habits outside a crisis than in one.

## HOW TO READ THIS BOOK

Since you're now better acquainted with both my philosophical and military background, you'll perhaps appreciate that I'm not going to leave you wondering where we're going and why. I'm going to use the well-worn Army framework of "Tell 'em what you're going to tell 'em, tell 'em, then tell 'em what you told 'em." That's a communication team habit that's not broken, so I'm not going to fix it.

This book is divided into three parts.

- **Part 1:** This part (which includes this chapter) contains the introduction to and overview of team habits. It will orient you to what team habits are, explain how they're the key to working better together, and acquaint you with the different categories of team habits. This part will also include a quick Team Habits Audit that will help you diagnose which category to start with.
- **Part 2:** In this part, we'll discuss each category of team habits on its own. I'll share patterns and habits that you can try in your team. Not every team habit suggestion will fit your team perfectly, and that's okay—my broader goal is to be close enough that you can adapt it to fit your team's context.
- **Part 3:** This part explains how to build a plan to change your team habits. Because team habits are shared agreements, it will start with the political and social dimensions of making change happen. It will then move into how to make a plan and, finally, how to adapt once reality inevitably changes your plan.

Along the way, I'll be sharing various worksheets, tools, and resources. You can find a complete list of those at [teamhabitsbook.com/resources](http://teamhabitsbook.com/resources).

You'll also find sidebars throughout the book that explain common organizational frameworks. These are meant to provide a simple overview to explain the concept and give everyone on the team—individual contributors, managers, and leadership—the same tools and language for talking about team habit change.

Oh, and there's a glossary in the back for all the “Charlie-isms” that you'll encounter as we go.

The only right way to read this book is the way that works best for you. I hope it stays on your shelf and you return to it as you need to, which means you'll probably engage with it differently each time. The book's structure gives you many ways to explore and use it, but there are four logical pathways:

1. Read the whole book front to back, and then start applying it.
2. Read Part 1 to get what you need, do the audit, read more about the category you're most called to work on, and then jump to Part 3 to start making your plan and working the plan.
3. Jump right to Part 3 because you already know which category of team habits you want to start with. If you're the espresso type, you can't go wrong with choosing Belonging, Decision-Making, or Meetings as the category to work on.
4. A variation of 2: you go back, read about the next category you're called to work on, and then start making your plan and putting it to work.

## **WHO THIS BOOK IS FOR**

This book is not just for managers or senior leaders. **In fact, my goal is to democratize the idea of who gets to make change within an organization.**

### **Individual Contributor**

As an individual contributor, you'll approach change differently than the Big Boss, who can just walk in and make changes with a snap of their

fingers. My goal is to teach you how to become a good project champion and collaborator and give you the tools to start having discussions about habits within your own team. Share this book with your teammates and manager.

### **Manager**

As a manager, you have more innate power within the organization to change things, but you're still probably only in charge of one team within the larger organizational culture. You can fix some bad team habits but not all of them. My goal is to help you audit which team habits are the biggest issue and give you the tools to see team habit change sprints through.

### **Senior Leader**

This book will show you a different way to understand what's going on in your organization. It will give you a more granular view of why things do and don't work well and hopefully open your eyes to problem areas. After all, there typically aren't any broken printers in the senior executive's office. Your impulse while reading this book may be to jump in and clean up a whole mess of broken printers, but I want you to tamp down the urge to change too many things at once.

**Why? Because if you just unilaterally determine everything and drive the project yourself, you may have changed the organization, but you've created a team habit that relies on your will to change future team habits.**

Remember that you're probably too far removed from the actual work that's going on to choose the most effective solutions. My goal with this book is to help you understand *how* your organization makes changes in team habits and create a lingua franca around how team members at every level of your organization can approach change management.

### **For Every Teammate**

As much as this book is about work, it's even more about relationships: the relationship you have to your work and the relationships you have

with your teammates. The same questions that you find in books on personal relationships are analogous to the questions we ask ourselves about work and our teammates. (Are they the one? Can I trust them? How can we get along better? How can we create more positive shared experiences and meaning?)

As with working on relationships, any work you do to make work better will not be wasted time. The efforts you make to work better together with your team will likely transcend any work relationship you have with your teammates.

How would you feel if you knew a teammate was working to make your day-to-day work life better? To help you feel that you belong and matter? To trust that you've got it? To celebrate your contributions, respect your counsel, and have your back without your asking for it?

We can all be that teammate, whether we're individual contributors, managers, or senior leaders. The rest of this book will show you how.

## CHAPTER 1 TAKEAWAYS

- Every team is hampered by small and fixable breaks in the way team members work with each other (broken printers).
- Just as we have personal habits that may be good or bad, every team has habits that support the work or get in the way. And just as with personal habits, it's possible to identify the bad ones and shift them into something more positive.
- If teams are working well or poorly, it's not really about the people in the team. It's about how they're working together.
- Team habits exist whether or not we acknowledge them. You're either participating in broken team habits or you're working to change them.
- No matter your role in your company, you have the ability to change your team's habits.

# MORE PRAISE



“Every single team leader should have a copy of *Team Habits*! Small teams and large, leaders with direct reports and those that lead collaborative projects, new and experienced leaders.... this book should be your desk reference for improving the productivity, and results, of your team! Gilkey’s process uses relatable stories, approachable ideas, and practical exercises to break down common and complex obstacles into achievable action steps. I can’t recommend this book highly enough!”

– Jenn Labin, Director of Learning and Development at mentorcliQ



“*Team Habits* is an outstanding business guidebook for our modern age. It’s an essential how-to guide for everyone in an organization, from staff to executive management, that will be referred to again and again and again – not a book to read once and stash on the bookshelf, its lessons destined to fade with time. The book (and the author) deeply understand and skillfully explains how a consistent focus on humanity and getting the little things right can build and sustain an effective (and happy) team.”

– Terry St. Marie, Owner, More Human Leadership Consulting



“*Team Habits* will stand the test of time and is now required reading for all of my clients. It’s filled with equal parts wisdom, stories, and crystal-clear actionable recommendations. The conscious and intentional attention to ‘belonging’ as a critical dimension of effective and sustainably successful teams might on its own be a game-changer. Best of all, it makes clear the idea that no matter your role or level, it’s possible to build better team habits that lead to better outcomes.”

– Karen Wright, CEO, Parachute Executive Coaching

“In these days of distributed and hybrid work, and economic volatility, the empowering and timely message of *Team Habits* is that it is squarely within our span of control to create amazing team results. Gilkey provides that rare, tactical deep dive into the mechanics of great teams by sharing the ingredients of success, detailing not only best practices in decision-making, goal setting, and communication, but also the critical role “belonging” plays in any team’s health and results, elaborating on specific actions that establish team cultures that are truly inclusive. This is a must for anyone leading a team at a time when we are re-inventing the rules of work.”



– Jennifer Brown, founder and CEO of Jennifer Brown Consulting; keynoter and best-selling author, *How to Be an Inclusive Leader* (2nd edition, 2022), podcast host, *The Will to Change*

“In this world of hybrid work and post-COVID workplace disruptions, who’s not having team issues? The solution isn’t a bigger vision or bigger talent. The solution rests in the small, tactical actions your team takes to build better habits. *Team Habits* is the essential handbook every leader and team member needs. Charlie Gilkey offers a refreshing right-sized approach to transforming a team based on true belonging, wise practice by wise practice.”



– Jeffrey Davis, Strategist, Speaker, Author of *Tracking Wonder*

“*Team Habits* is a must-read for creating effective teams in today’s environment. Current within today’s landscape, Charlie takes the building blocks of systems and partners them with human preferences to springboard teams to a new level.

“Equal parts inspiration and handbook, the magic of this book is in the digestible practices for both team members and leaders. Whether you’re new to team experiences or have experienced challenges in teams, you’ll uncover impactful tools so your team can flourish.”



– Patricia Bravo, Leadership Consultant and Owner, Bravo For You





## MEETINGS

*In a good meeting, there is a momentum that comes from the spontaneous exchange of fresh ideas and produces extraordinary results.*

—HAROLD GENEEN

One of the reasons meetings are such a go-to for people when they're thinking of team habits to change is that they are the context in which all other team habits come into play.

You experience belonging and trust in real time. You see decision-making, goal-setting, and planning in action. Communication and collaboration habits pop up as you start talking about how you will work together to get it all done.

Meetings are one of those places where, in the span of an hour, you see all your bad team habits one after another in rapid succession. People talk over each other. People feel excluded from the process. The plan goes wonky (or it becomes clear that it was never there to begin with). Decisions are rushed, and next steps are lost. It's not clear who's on first, so "somebody" gets a lot of jobs.

Meetings are also painful because when we're in the middle of one—particularly one that's going badly—we're hyperaware that there's

a bunch of other work we could be doing. Work that (hopefully) we find meaningful, challenging, and fulfilling. Work that (probably) someone else is going to call us out for not doing because we were stuck in this meeting.

It's a rare organization or team that can honestly say they love every meeting they have.

**Meetings can be either a powerful force multiplier or a powerful force diminisher.** Getting people together for a great meeting can create a leverage factor for a team's energy that can make something completely different and better. Or it can diminish your team's attention and capacity and keep them from doing the work they should be doing.

The great thing about focusing on meetings is that you don't need to go to senior executives for buy-in to improve them. You don't need to coordinate with another team or business unit to make changes. You can simply decide with your team that you're going to change your meeting culture into something that supports you in doing your best work.

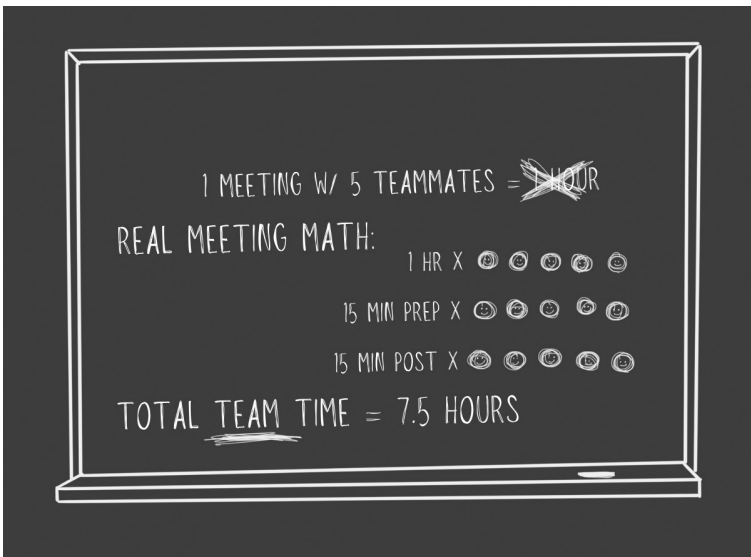
All of this is why meetings are a great place to start when addressing team habits. But if you're still not convinced of the true cost of poorly done meetings, it's time to break out the calculator.

## MEETING MATH

When the \$500 office printer breaks, we have to fill out a requisition form or purchase order to replace it. That \$500 gets scrutinized before it is approved—or not. But when we want to call a meeting? Nothing stops us, even though most meetings cost far more than \$500 from the perspective of salaries and blocks of time.

In business, it is harder to get access to money, even though it is easier to get more of it, than it is to get access to the thing we have a massive shortage of: people's full engagement and attention.

Let's look at the true cost of a meeting.



### How Long Are Meetings, Actually?

You've called a one-hour meeting. How much time does that really soak up?

- Before the meeting: fifteen minutes of prep and transition. This is the time spent transitioning from whatever you were doing into meeting mode.
- Meeting time: the one hour of time *actually* scheduled for the meeting.
- After the meeting: fifteen to twenty minutes of exit and admin time. Most meetings create more work, whether that is sending out a message, spending time making a decision about what was discussed, or just transitioning back into deeper work.
- When you look at it this way, a one-hour meeting really takes up at least ninety minutes of your time.

### How Many Meetings Do You Actually Have per Week?

You may look at your calendar and say you have between three and five standing meetings every week. Not bad, right? Until you start factoring

in all the unexpected “crutch meetings” that pop up at the last minute. (Crutch meetings are meetings that act as a stand-in for a poor team habit; we’ll talk about them in more detail in a minute.)

Normally when I do this exercise with clients, they’ll tell me that 50 percent of the meetings they had last week were one-off meetings that don’t normally happen. But when we go further back through their schedules, it becomes clear that “one-off” meetings essentially take up the same amount of time each week. They might as well be considered standing meetings, which means you need to take them into account in your schedule. (And then, as we’ll discuss, figure out how to eliminate them.)

Taking crutch meetings into account, you may *actually* have eight standing meetings a week that average forty-five minutes each. Using the rule of thumb that there will be at least thirty minutes of prep and admin time before and after each meeting, that’s a full ten hours of every workweek eaten up by meetings.

That leaves you thirty hours in a typical workweek to do the work you’re ostensibly being paid to do. Not too bad, right?

Hold on just one second—it gets worse.

### **When Are Meetings Held?**

When the meeting is held is just as important as how long it is. If you schedule a meeting at 8 a.m., for example, you catch most people in their warm-up cycle. Most people aren’t ready for deep conversation at that time, which means the meeting will be longer than needed, more confusing than anticipated, or just plain useless.

What’s more likely is that you put invisible work on your team to show up earlier to work to prepare for the meeting. Time spent preparing for the 8 a.m. meeting displaces the time your teammates were probably spending on self-care, family, or sleep.

Scheduling meetings at 9:30 or 10 a.m. isn’t much better, but for different reasons. That midmorning meeting essentially ensures that your teammates don’t get a full focus block on either side of the meeting. Unless they get to work super early, they will probably spend the morning on admin and then spend the hour after the meeting pushing things around

before lunch. That hour-long meeting ends up demolishing an entire morning's worth of focused work.

At Team PF, we tend to schedule meetings at 11 a.m., 1 p.m., or 3 p.m. An 11 a.m. meeting gives people a good focus block of work in the morning, after which they can come to the meeting warmed up and ready. A 1 p.m. meeting harnesses that “just back from lunch” energy while leaving a solid amount of time in the afternoon for focus blocks, and 3 p.m. can be a powerful meeting time or not, depending on your team's chronotypes (which we will talk about more in the team core habits chapter).

This can be more difficult to manage with teams that span multiple time zones. The important thing is to work with your teammates to find the option that best fits all of your schedules.

The day on which meetings happen during the week can also be a force multiplier or diminisher because it determines the shape and cadence of the week. This is why we see so many planning and coordination meetings on Monday or Tuesday. If you schedule a planning meeting on Thursday, people are either frazzled or distracted by looming end-of-week deadlines. Whatever you planned during that meeting will be tough to remember by the following week.

It's less palpable, but the timing of certain types of meetings during a month can also shape the workflow of a month or quarter.

In our imaginary meeting math example, we've established that you technically have eight seventy-five-minute meetings throughout the week. Take a look at when they fall. How many of them are effectively torpedoing an entire morning's or afternoon's worth of work?

### **How Many People Are at the Meeting?**

The final calculation in meeting math is this: If you have one hour-long meeting with eight people, *you're actually having twelve hours' worth of meetings.* (This is after we take into account the buffer time on either side of the meeting.)

You're using up eight hours of time and attention. Eight hours of people's salary. When you think about it that way, eliminating one meeting

can eliminate that claim on eight people’s attention and free up much more time for actual work to happen.

Meeting math is the answer to the question of why your team is having such a hard time pushing projects forward. Why are they not getting strategic work done? Why are they burning out? Why do they keep getting blocked by the strategic-recurring-urgent work logjams that we talked about in the chapter on planning?

**Once you factor in meeting math, you can see why there’s just not enough time in most people’s calendars to do their work.**

If they *are* getting work done, odds are that they’re doing it in such a way that it is pushing them along the road to burnout because the only times they can find focus blocks are nights and weekends, when their schedule isn’t being interrupted by meetings.

#### MEETING MATH EXAMPLE

Standing meetings per week	8 meetings
x Time spent per meeting (including buffer time)	1.5 hours
= Total time (per person) spent in meetings	12 hours
x Number of teammates	8 people
= Total team time spent in meetings	96 hours
x Average hourly pay	\$50 per hour
= Amount spent on meetings per week	\$4,800 per week

The team in the above example is spending \$240,000 per year on meetings, yet no one can get approval to replace the printer that’s been out-of-date for years.

I’m not trying to say that all meetings are bad. I *am* saying that I want your team to have meetings that intentionally and habitually act as a multiplying force of your team’s ability to do their best work. Understanding meeting math can give you a powerful tool and language to start tackling team habits around meetings.

## Eliminate Crutch Meetings

One question I often get asked is this: When counting meetings, should you note every quick one-on-one conversation with a teammate? What if you and a coworker ran by a third teammate’s desk to straighten out your questions with a ten-minute chat? How many people need to be at a meeting for it to “count”?

When auditing your meetings, resist the urge to be legalistic about how to specifically define a meeting and instead go with the old mantra “I’ll know it when I see it.”

A quick meeting with a coworker can be a huge time saver. If you were gone for a couple of days, you could easily log in to Slack on your first morning back and spend ninety minutes sifting through threads to catch up. Or you could phone a friend and get caught up in five minutes. Was that technically a meeting? Don’t worry about it too much.

You *do* need to be on the sharp lookout for when meetings become crutches for bad team habits in other categories.

**Crutch meetings are used to address things that should be taken care of outside the meeting but aren’t.** Your plan keeps going off the rails, so you call a meeting to fix it. Your communication has broken down, so you call a meeting to get everyone on the same page. No one knows what the priorities are, so—you get the idea.

When you take a deeper look at people’s overloaded meeting schedules, it becomes clear that many of those one-off meetings are actually crutch meetings. If you want to remove them from your schedule for good, you need to address what’s causing them and get ahead of it.

The daily standup, which we touched on in the chapter on planning, is a good example of a potential crutch meeting. If you need to have a daily standup because you don’t have another clear way to keep everyone on track, it’s an expensive way to fix a planning problem. But it could also be the case that you’re in a VUCA environment—such as a merger, reorg, or global pandemic—and the daily standup is the best way to quickly identify the day’s priorities and update team members on new information.

## What's Your Meeting Promoter Score?

Your meeting promoter score is a play on the net promoter score, which was created by Fred Reichheld and outlined in his book *The Ultimate Question*.<sup>1</sup> In the same way that marketers can get a quick sense of how well their product or company is doing based on the question “How likely are you to recommend [X] to a friend?,” you can quickly discover whether a meeting was worthwhile by asking, “Would you recommend this meeting to a coworker?”

Meetings affect every one of us uniquely. If you're a social person, even mediocre meetings might be the highlight of your day. If you're an introvert, even showing up to the best meeting ever could be an energy drain.

As you explore team habit shifts around meetings, keep in mind that however you feel about meetings, others on your team might not feel the same way. **For a lot of people, having a meeting on the schedule adds an additional layer of anxiety to the day.**

Even a virtual meeting means having to put makeup on, having to be approachable, remembering to smile, or making small talk. There might be stressful logistical questions to answer, such as “Do I need to be on camera? Will the dogs start barking? What if I have to breastfeed? Do I need to tidy up my office?”

I could get on a call and talk all day, but that's not the case with most of my teammates. I know that every time I call a meeting, each of them has an additional level of negotiation that I am not necessarily privy to in order to show up for the meeting. I'm serious about that responsibility.

One of the things that surprises a lot of people when they join Team PF is that they tend to end meetings feeling glad that they were there. They leave more connected, inspired, and excited than they were before the meeting. We work hard to make sure that every meeting on the calendar is multiplying the force of our team's efforts rather than draining them.





## AUDIT YOUR MEETINGS

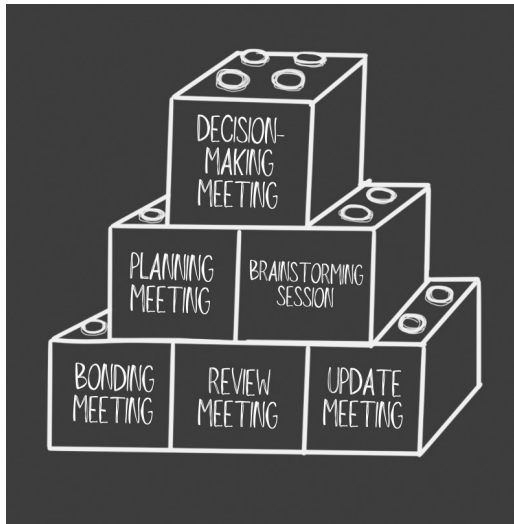
- » Look at your schedule of standing meetings on a weekly and monthly basis and then work through the meeting math above. To your best estimate, how much time and salary are being spent on meetings each week?
  - » When do meetings happen during the day? Do they impede potential focus blocks for your teammates? Is there a different time of day that would make more sense to ensure that everyone in attendance can engage? Be sure to account for teammates in different time zones.
  - » Does your weekly, monthly, and quarterly meeting schedule drive work forward and create force multiplication? Or does it diminish and squander the team's time, energy, and attention?
  - » How many meetings on your schedule in the last six weeks were actually crutch meetings? What faulty habit created the need for that meeting? Once you notice a trend, that's probably the next team habit to start working on.
  - » To determine whether a meeting is worth keeping on the schedule, ask yourself and your team, "Are you glad we had this meeting? Did it drive our energy and focus or disperse it? If you had to review it on Yelp, would you recommend it to a friend or teammate?" If the answer is no, the next question you need to ask is "What can we do to make our meetings less stressful, more effective, and more of an amazing force multiplier for the rest of our team?"
- 
- 

## BUILDING BETTER MEETINGS

How many times have you walked into a conference room or logged in to Zoom with no clear idea of what the meeting you're about to attend is for?

Building better meetings starts with understanding that not all meetings are cut from the same cloth. **Every meeting falls into one of six categories, or is made up of blocks of those categories—many of which mirror the categories of team habits we’ve been talking about.**

When you start a team habit of defining meeting categories, it helps you put into perspective what meetings are necessary for what reasons. And, hopefully, relieves your teammates of the frustration of stepping into a conference room or logging on to a Zoom call without a clue as to what’s going on.



## **The Six Meeting Blocks**

### *Decision-Making Meeting*

The point of a decision-making meeting is to get the appropriate number of people at the table to go from information to decision. Decision-making meetings are called either early in the process, when you know a decision is going to come up, or later on, when you have gotten stuck and need a decision to drive work forward.

### *Planning Meeting*

Planning meetings are designed to get the team on board with a certain course of action and align your activity with a timeline. In an ideal

world, most of the preliminary decisions would have been made before going into a planning meeting, but some planning meetings are designed to help inform the decisions that need to be made in order to execute the plan. Once you've had your planning meeting, you can then have a shorter decision-making meeting that includes just the required people.

### *Brainstorming Session*

The goal of a brainstorming session is to generate potential solutions and courses of action. For a brainstorming session, the goal should be to keep expanding possibilities rather than distilling those ideas and options into actionable solutions.

### *Bonding Meeting*

The main point of a bonding meeting is to build belonging and rapport by getting to know each other better. The topic of conversation should be work only insofar as it makes people more comfortable socializing.

I want to slow down on that point for a moment. A lot of facilitators tend to be extroverted quick thinkers and don't see the problem with ambushing teammates with a bunch of thoughtful icebreakers designed to get conversation flowing. But a lot of people would rather not just show up and talk about themselves without being given time to prepare. Having work-related conversations invites them into the conversation, as opposed to putting them on the spot with questions that can seem intrusive, like "What are your dreams?" or even "What are your plans for this weekend?"

We talked about one of my favorite questions for these types of meetings in the chapter on belonging: "What are your nonwork wins?" In my experience, anyone can engage with that question without feeling as if they are participating in some sort of public journaling exercise.

### *Review Meeting*

The point of the review meeting (or debrief, or after-action review) is to look over a previous activity and see what worked and what didn't

work and to develop insights that you can apply to current or future plans and projects.

### *Update Meeting*

The job of the update meeting is to keep people informed about what's going on, distill the key information, and provide a place for people to ask questions. An update meeting is a sense-making meeting where you just help people make sense of what's happening around them.

I hesitated to put update meetings on this list because I've been to far too many update meetings that could have been an email or that were so packed with such high-level communication that I left feeling less clear about what was going on then when I went in.

A good rule of thumb for update meetings is that people should leave feeling more clear, aligned, and engaged with the work ahead. "Engaged" doesn't necessarily mean inspired and excited; resolute will do.

### **Using Meeting Blocks**

Think of the six types of meetings as building blocks. You can choose from the blocks to create a meeting that builds belonging, helps you brainstorm ideas, and leads to decisions. Or you can create a meeting that provides updates on progress, then helps you decide on a path forward.

Thinking of each of these as separate blocks will improve your meetings in a few ways.

### *Build Complementary Meetings*

Not all meeting blocks play well with one another. For example, having a bonding block after a review block can be difficult. If you are brutally honest about what went well and what went wrong during the review meeting, people might feel too defensive for a bonding exercise. There are ways of debriefing that build belonging, but it's tricky. As a facilitator, you need to know you're potentially playing with fire when you combine these two blocks.

While brainstorming, decision-making, and planning meeting blocks seem as if they naturally complement each other, they can also be prob-

lematic when included in the same meeting. Switching between those three mental states can be tough, which means that as a facilitator, you need to be very clear about what state you're in.

### *Call Out Block Switches*

When a meeting slides from one type to another without the facilitator calling out that there has been a switch, it can feel confusing. People aren't sure how to engage, and they might not be sure what you need from them. Calling out what type of block you're in during a meeting lets your teammates know how to partner with you better at every step.

Let's go back to the example of brainstorming and decision-making. When used in the same meeting, they can either become a muddy mess or be extremely effective, depending on how well the facilitator calls out what phase the meeting is currently in. I recommend starting with brainstorming. Once the brainstorming session is over, make it clear that you are now in the deciding portion of the meeting. This gives everyone—especially the creative folks—the cue that it's not time for eighteen more ideas; it's time to pare the ideas down to the best ones.

Sometimes, meetings can make an unplanned shift into a different block. Update meetings in particular have a habit of sliding into decision-making, reviewing, and brainstorming. You will be on your third update point of seven when somebody jumps in to ask strategy questions or start brainstorming solutions. As a facilitator, it's your job to say, "I appreciate that, but the point of this meeting is to update. We'll schedule a separate conversation for brainstorming or planning."

### *Avoid Overstuffed Meetings*

As you learn how your team works, you'll also develop a sense of how quickly you can get through topics and types of meeting blocks. If I see an agenda that has us brainstorming six topics in one hour, I know we will never get through it. Our team takes twenty minutes on average to get through a brainstorming block, which means we either need to reschedule the meeting to a longer time block, break it into parts, or find another way to do the brainstorming.

**When looking at an overstuffed meeting, resist the urge to squeeze out the bonding block at the beginning or skip noting the next steps at the end.** Both of those are hugely important parts of the meeting, and the five to ten minutes you'll save by cutting them will create downstream problems in team performance, belonging, and collaboration.

If you do need to squeeze something out of an agenda, do the hard work of triaging what needs to go into this meeting and deciding how you can get through the rest of the work elsewhere. And if you need multiple meetings to cover it all, then schedule multiple meetings. Don't try to crush everything into too short a time.

### *Set Clear Agendas (with Clear Facilitators)*

If I was king of meetings for a day, I would create two rules. The first would be that you don't get to request a meeting without an agenda. The second would be that you don't get to ask for a meeting when it's not clear who the facilitator is.

Those two things are intimately connected because if they are not set, we're back to the "somebody" problem. Somebody will figure out the agenda, and somebody will lead the conversation. But when we all log in to the video call at 11 a.m. Team Standard Time, "somebody" hasn't shown up to lead the meeting.

My rule is that if you call the meeting, you are the facilitator. If you want the meeting, it's now your job to come up with the agenda and drive the conversation. This is considerably harder than most people think, which means that in the future, they might find another way to obtain that information than a meeting.

Thinking about meeting blocks makes the job much easier for both the facilitator and the rest of us who are showing up. If you tell me the meeting is to "talk about" Project X, I don't know what I need to do to prepare. If I know the meeting is so that we can come to a decision on Project X, I know exactly what is expected of me when I show up.

As well as assigning a facilitator, it can also be useful to assign other meeting roles, such as a scribe for note-taking and a timekeeper who can

keep an eye on the clock and make sure enough time is left for alignment and next steps.

## Meeting Templates

Much of the work for the facilitator is thinking through how they'll lead the conversation effectively. One way to solve that issue quickly is to use meeting templates. Meeting templates don't have to be restrictive; they can simply be a rough agenda template that has the key building blocks for certain types of meetings baked in.

For example, most team meetings need some time for grounding and bonding before diving into the meat of the agenda, so it makes sense for that to be a standard block on the agenda. But you can approach that bonding block in a number of ways. You could leave it as open water-cooler time, where people take a few minutes to chat about their weekend at the Monday-morning update meeting. You could make it more structured, where everyone has a minute to answer an icebreaker question.

At Team PF, we start our monthly update meeting by asking for everyone's wins and celebrations. This has the benefit of starting the meeting with some lightness and levity and gives us a chance to learn what everyone else has been up to. It's also an incredibly powerful way to kick off the rest of the meeting with forward momentum and confidence.

If you're scheduling a problem-solving meeting, you might start with an update block to get everyone on the same page. Next, you might have a brainstorming session, followed by a planning block and then the next steps. Instead of repeatedly rebuilding that agenda from scratch, create a meeting template that anyone who is facilitating can use whenever your team needs to solve a problem.

As a side benefit, creating or reconstructing meeting templates can be a powerful opportunity to think together as a team about all the other things that you do outside the meeting.

For example, when we created our template for team development meetings (our spin on performance reviews), it made us rethink how we wanted to approach the entire review process. Typically, a performance review is top down, with your boss coming in and telling you

whether or not you're doing great. At Team PF, we decided to invert that model and create a container for the team members to tell their manager how things are going and bring up hard conversations they might need to have.

Our team development meeting has several key parts:

- We talk about what you've done well over the most recent period of time.
- We ask what internal challenges you're having (e.g., you don't have your schedule properly aligned for your chronotype).
- We ask what external blockers have made it difficult for you to work (e.g., team priorities are unclear or in conflict).
- We ask if there are any hard conversations that you need to have with your manager or as a team.
- We ask what you are interested in focusing on in the future.

Creating this template allowed us to reshape the typical performance review and turn it into a meeting that increases belonging, proactively addresses hard conversations, and builds excitement for the future.



### BUILD MEETING TEMPLATES

- » What types of meetings do you have most frequently? Think in terms of different time horizons: daily, weekly, monthly, quarterly, and annually. Don't worry about capturing all of them in your first pass. If your time is limited, start by thinking about your daily and weekly recurring meetings.
- » Pick two to three kinds of meetings to work on first, and review the building blocks you use. What blocks could you add to improve the meeting (for example, a bonding block at the beginning of the meeting)? What blocks could you subtract (for example, an update block that could be an email)?



- » Share your proposed meeting template with your team in advance of the next meeting. Don't surprise your team in real time with a brand-new way of doing things; take advantage of the IKEA effect and get buy-in by inviting them to help you create a better meeting structure.
  - » Give your team three to five runs of the new meeting template before you decide to make too many changes to it. That will help you dial in how much time you actually need per building block and give you a sense of what other team habits are being displaced or absorbed by the new meeting structure.
  - » As you begin to audit your meetings, start to build a library of templates. What should be in your weekly huddle? What can you add that would make it more powerful? What can you subtract? (You will find examples of meeting templates at [teamhabitsbook.com/resources](http://teamhabitsbook.com/resources).)
- 
- 

## **MAKE THE DEFAULT “NO INVITE”**

Once you start thinking about meeting math, it quickly becomes clear that a teamwide meeting request for thirty minutes is a way bigger ask than many of us have been led to think. Maybe you've concluded that the meeting is still necessary—but does everyone on the team need to be there?

We've already discussed several reasons why you might not invite someone to a meeting. In the chapter on belonging, we discussed intentional exclusion as a kindness you can do for your coworkers. In the chapter on goal-setting and prioritization, we talked about how people who are wearing the green hat (meaning in the middle of high-priority work on a project) may not need to attend a meeting that would sidetrack them from their work.

As a meeting facilitator, it's your job to ask who else doesn't belong on your invite list.

Unlike culling people from your holiday soiree, dropping people from a work meeting that they don't need to attend is a kindness. And

when your team habit is that your default is no invite, it becomes a forcing function to make sure that every person you invite to every meeting has a clear reason for needing to be there.

If the reason for a person’s attendance isn’t clear, do one of two things:

- Let them know they don’t need to be at the meeting and tell them why. For example, the meeting will focus on approving graphic assets for a launch, and their part of the project doesn’t involve the graphics.
- Think through the meeting agenda and revise it so that their contribution is clear. For example, even though their part of the project doesn’t involve the graphics, you need to tap their technical expertise so that the final graphics play nicely with the marketing automation software that person manages.

“You need to stay informed” isn’t a fantastic reason for your teammate to be at a meeting. It’s not *incorrect*—they do need to stay informed. But if you send an update email at the end of the meeting, that teammate can skim it in five minutes and be able to stay on track with their workday.

When the default is no invite, the result is that anyone who’s at the meeting has a purpose for being there and knows what it is. This gives your teammates the gift of being able to be fully engaged in the meeting versus either showing up without being prepared to contribute or attending under duress while thinking about the work they could be doing instead.

The inverse team habit is to make it possible for individual teammates to ask why they need to be at a meeting if they’re unsure. They shouldn’t ask in a hostile way but rather to obtain clarity and context about how they’ll contribute.

There is an exception to the “default is no invite” rule: bonding meetings. If people are especially busy, it’s easy to assume that because they’re on a high-priority project, they probably shouldn’t be spending

their time at meetings unrelated to the work at hand. True. But in that case, I would suggest delaying the bonding meeting until every team member can be there.

This respects the time of the team member who is wearing the green hat *without* also giving the impression that bonding actually isn't important. Even if we don't explicitly say so, excluding busy team members from a bonding session tells everyone that the work itself is more important than coming together as a team.



#### WHY AM I AT THIS MEETING?

- » For every person who is invited to a meeting, write one to three sentences to explain why their presence is required. Bonus points if you share it with your teammates so they can come prepared to fully participate.
  - » Create a team habit where every team member can ask for clarification about why they should be at a meeting so that they can either become a better team player by participating in the meeting or get back to work that is a more valuable use of their time and attention.
  - » If the purpose of the meeting is primarily bonding, delay it until everyone on the team is able to attend.
- 
- 

#### CAPTURE NEXT STEPS

In theory, we all know that it doesn't make sense to have an entire meeting and then walk away without going over the next steps. *Of course* we should capture our ideas at the end of the meeting and turn our decisions into action points.

In practice, we are probably not doing it as well as we could.

The main reason is that our meetings are crammed with different building blocks, and we simply don't leave ourselves the last five to ten minutes to process what needs to happen. Why does this become a problem?

- The context in which we are having the meeting differs from the context in which we will be doing the work, and details will inevitably be missed in the transfer. For example, we may be brainstorming in Google Docs or on a whiteboard in the conference room. But that space probably isn't also where we keep track of team tasks and draft work, so unless one of us converts these notes into tasks in a team channel, the work we did disappears.
- We expect individual participants to keep track of their own next steps. I have my list and you have your list, but because there's no central source of truth, there's nothing to keep us from drifting. We decided on the call that we are going to California, but because it's not written down, neither of us realizes that I meant Sacramento while you were thinking San Diego.
- It seems pretty clear who's doing what, so you don't bring it up. Or you have no idea who will own the action item, but it will take so long to figure it out that it seems easier to just not do so. Either way, "somebody" ends up with the task because we didn't take the time to assign it.

In an ideal world, you leave the meeting with fewer open loops than you started with. Not adequately dealing with next steps means that even if your meeting closed a few loops, it opened up even more.



### DEFINE NEXT STEPS

While it's always a good team habit to practice properly capturing and assigning next steps, there are a few cases in which you need to be especially clear. You might have a new teammate who does not

have the same high-level context about how you do things around here. Or maybe you just switched collaborative technology and need to remind people not to look at the old team wiki but to go check the Notion board instead. You could be in the middle of a major context or priority shift or a high-urgency event, such as a launch, and some of your team habits may have shifted or been suspended.

Even if you're not in any of those situations, you may know that next steps and action items are being lost. If so, this team habit needs to shift.

- » When you set the agenda for a meeting, leave five to ten minutes for capturing next actions and designate one person to add those action items to the team collaboration space. (Remember from the last chapter, teamwork needs to happen in team channels.)
  - » For each action item, include these four elements:
    1. What is the action item?
    2. Who owns it?
    3. Where does it live?
    4. When will we see it show up in that spot?
  - » If you sense that you need to make a radical change around how you capture next steps, schedule a separate meeting to discuss it. That way, you're not trying to figure it out while distracting from the topic of another regular meeting. Using the meeting blocks, design a meeting specifically to address changing this team habit.
- 
- 

## CHAPTER 9 TAKEAWAYS

- Meetings can be either a powerful force multiplier or a powerful force diminisher, which is why they're a good place to start when it comes to changing team habits.
- Every meeting has hidden costs. A one-hour meeting with five team members actually takes up ninety minutes per team member. What could your team do with an extra seven and a half hours a week?

- Every meeting should have a facilitator and an agenda.
- Use the six meeting blocks (decision-making, planning, brainstorming, bonding, review, and update) to build better meetings and create meeting templates.
- Everyone who attends a meeting should have a clearly defined reason for being there. Otherwise, the default should be no invite.
- Leave time at the end of every meeting to capture next steps.

## CLICK THE ICONS BELOW TO ORDER YOUR COPY TODAY

If you've enjoyed chapters 1 and 9 and are ready for your team to work better together, pick up your copy at the following retailers.

*Team Habits* is available in hardback, ebook, and audiobook formats.

---



Interested in a bulk purchase?  
Click here for bulk ordering.