

Clear Agreements Worksheet

We notice a strong correlation between the effectiveness of agreement-making and the effectiveness of individual leaders and teams.

What is a Clear Agreement?

A clear agreement is mutual assent of two or more people to a course of action, with each person taking 100% responsibility.

Prerequisites for Clear Agreements

- Create a culture where you make and use clear agreements
- Make explicit agreements when possible (rather than implicit)
- Implement a system for tracking agreements

Healthy Responsibility and Agreements

Clear agreement-making requires all parties to take 100% responsibility.



Popular Forms of Non-Agreements

The following types of indirect communication lead to murky agreements, if agreements at all.

- **Stated preferences:** "I'd like us to stop buying plastic water bottles for the office."
- **Suggestions:** "We should stop buying bottled water."
- **Directive:** "Do not purchase bottled water for office use."
- **Requests made in a diffuse manner:** "Can we all stop using bottled water?"

How to Make a Clear Agreement

Initiator prepares a request for an agreement with the following in mind:

- What's the goal? (if applicable)
- To whom is the initiator making the request?
- What course of action does the initiator want? (e.g. a task to be completed, a change in behavior)
- What is the timeframe? (start time, deadline)

Steps:

1. Express the request: Initiator states their request explicitly, with wording that solicits an answer. (*"Would you be willing to do Y by Z?" or "In order to do X, would you be willing to do Y by Z?"*)

2. Ensure understanding of the request: Receiver asks for clarification if needed.

3. Consider the Request: Receiver pauses and asks themselves:

- Is the agreement realistic?
- Do I have the skills, resources, and control to do what's being asked?
- Are there conditions or trade-offs required to make the agreement work?
- Am I convinced that those on whom I depend will deliver for me?
- Am I willing to take 100% responsibility for anticipating and adjusting for any breakdowns in the process?
- Do I have a full-body yes to this agreement?
- Do I need more time or information before answering?

4. Respond to the Request: Receiver responds with one of the following options:

- Clear yes (*"Yes I agree to do Y by Z."*)
- Conditional yes (*"I agree, with conditions. I agree to do what you ask if A [mutually observable condition] happens. Would that work for you?"*)
- Counteroffer (*"I have a counteroffer. I don't agree to do Y by Z. I would agree to doing A by B. Would that work for you?"*)
- Request for more time (*"I'd like time to think about it. I will respond by _____ [date]."*)
- No (*"I do not agree to do Y by Z."*)

5a. (If yes) Document the Agreement: Initiator and Receiver decide how to record the agreement.

5b. (If conditional yes, counteroffer, or request for more time) Negotiate: Initiator and Receiver negotiate a new agreement. Several rounds may be needed, possibly alternating roles.

Based on work developed in *Conscious Business* by Fred Kofman, hendricks.com, and kaleyklemp.com