

Leader's Guide to a Ways of Working Session

What is a “Ways of Working” Session, and why is it important?

A collaborative activity that helps a team align on work habits, preferences, and expectations. It's a way to establish common ground rules, best practices, and norms that can improve the team's effectiveness and harmony. These sessions can help the team identify and address any challenges or obstacles in their work and find solutions or support to overcome them.



By conducting a Ways of Working Session, a team can enhance overall communication, collaboration, and productivity, as well as their well-being and satisfaction.

How to Get Started

Prior to conducting the session, the manager should first complete the following steps:

- 1 Define the session's purpose and outcomes, e.g., consider work habits, preferences, expectations, and norms.
- 2 Schedule the session at a suitable time for the team and email them the agenda and list of conversation starters that will be discussed during the meeting.
- 3 Ask the team to think about their work styles and answer questions beforehand (distribute the “pre-session questionnaire” on the next page)
- 4 Plan for it to be interactive and engaging by using tools such as polls, timers, breakouts, etc.

Ways of Working

Pre-Session Questionnaire for Team Members

When and how are you available for work? (i.e. remote/in-office, timezone, etc.)

How do you communicate and collaborate best?

What tools and platforms do you use for work?

How do you plan your time and tasks?

What challenges or obstacles do you face in your work?

How do you balance your work and life?

How do you track your progress and success?

Ways of Working

Guide to Hosting the Live Session

1

Start the session by going over the agenda and setting ground rules for the discussion. Ask everyone to be respectful, honest, open-minded, and constructive. If holding the session virtually, encourage everyone to use the chat or raise their hand to ask or share.

2

Have each team member share their answers to the Pre-Meeting questions. Give everyone a chance to speak by using a round-robin or a random order. Ask follow-up questions or clarifications if needed.

3

Once everyone has shared their answers, identify the common themes, patterns, and differences among the team members, then prioritize the most important or relevant topics for further discussion by using a voting or ranking system.

4

Go through the Live Session Worksheet (next page) as a team, with a specific focus on the most important and relevant topics identified in #3.

5

For each topic, brainstorm and agree on best practices, guidelines, or norms that the team can follow to work better and happier.



Pro Tip: Use a SWOT analysis, a pros and cons list, or a SMART goal framework to help you with this step.

6

Implementation: Summarize the main takeaways and action items from the session. Ask for feedback or suggestions on how to improve the session for the next time. Thank everyone for their participation and commitment and send a follow-up email with the session notes and outcomes.

Ways of Working

Live Session Worksheet

Meeting Design, Structure, Flow, and Form

How should we structure and design our meetings to be more effective?

What roles should we include? Should they be assigned?

Are there any meetings we currently hold that are no longer adding value?

Are we maximizing our time by leveraging pre-reads?

Are we crafting meaningful agendas, notes and post-meeting action items?

Collaboration

What are our preferred meeting hours for collaboration?

Are we effective at balancing synchronous and asynchronous work?

Where can we leverage asynchronous work? Does it make sense for our team given our roles? Where could it make sense?

When should we leverage synchronous work?

Continue to next page...

Ways of Working

Live Session Worksheet (continued)

As a Team...

Are we crafting meaningful agendas, notes and post-meeting action items?

How can we celebrate wins and find ways to recognize each other?

How do we prefer to resolve conflict on the team?

How can we create a more inclusive team culture?

How can we elevate the onboarding of our new team members?

How can we provide meaningful and timely feedback to each other?

How can we be more effective as a team?

Recharging

How can we take time to recharge?

How do we prefer to communicate our availability and boundaries to teammates and clients?

What are some challenging obstacles that prevent us from disconnecting after work?

How can we provide each other coverage so that we can fully take time off and NOT feel we must log on?



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