

Handbooks and Playbooks

Documenting How You Work

Every organization we've encountered has a unique story to tell. Many of those organizations have chosen to capture some of how they work through handbooks, playbooks and blogs. **Organizing core operating principles is an example of how transparency can increase the effectiveness** of everyone in an organization. Rather than believing that we compete to win so others will lose, progressive entities instead focus on achieving a meaningful purpose. In doing so, they focus their learning for everyone's benefit.

Team agreements are often collected together into a single living artifact, usually called a handbook or playbook. Team agreements only work when they are transparent to everyone involved. How can someone be accountable to an agreement they haven't seen, don't remember, didn't commit to or can't reference? The documents are published in various styles and formats and are made easily accessible and editable.

"The art of communication is the language of leadership."

-James Humes

When the team at ET Group first began shifting to self-organizing after decades in a traditional hierarchy, forty people needed to align. To help, members of ET Group's teamwork and relationships circle led the co-creation of a playbook. It's a small printed booklet that contains the company's purpose along with an overview of the team's structure and high-level operating practices. This small playbook provided sufficient guidance to get the team started, and they now update and reprint it as needed.

Once the first playbook was complete, questions started to arise. The team was looking for more guidance, more clarity.

The HR handbook that the company had been using for years no longer fit the team's needs or ways of working. A new online handbook was born as a detailed reference guide to how things work at ET Group. It's an evolving document. Now every member of the team has two places to go for guidance: the **playbook provides high-level guidance** while the **handbook gets into the fine details**.



Handbooks vs. HR Policies

Traditional companies use employment contracts, job descriptions and policies as tools to articulate expectations and control activities. Often the content of these documents does little to inspire proactive team engagement and goes unreferenced until troubles arise. Cocreated handbooks offer a better alternative.

Shifting our use of language is core to successful self-organizing. The documentation we outline differs significantly from traditional human resource policy handbooks. HR policies tend to be legalistic and focus on compliance, with command-and-control language. The substance of the content gets pushed down into the organization. Effective team agreements and handbooks differ in five core ways, as shown in the table below.

Traditional Employee Documentation	Cocreated Team Agreements
Cover the maximum number of possibilities that can be contemplated.	Cover the events you are currently experiencing or foresee coming up soon.
Are written by employers and define formal agreements between employees and the company.	Are written by the team for the team to clarify relationships and collective agreements.
Use third-person policy- and rule-based language (you should, must, never, are required to).	Use first-person casual language (we agree, find, have come to appreciate, have a shared expectation).
Are based on carrots and sticks and a belief that people need to be kept in line.	Are based on mutual trust and a belief that everyone has a positive intention.
Use future-state language (will, when required, should).	Use current-state language (agree, do, share, understand).
Are rigid and unchanging .	Are adjusted and customized frequently to evolve with the group.

Write Your Handbook

Every handbook we've read is unique, though we see meaningful threads between them. To help you get started, we've created a list of the kinds of agreements and points to consider including. Remember it's best to aim to cover current events rather than contemplate all future scenarios.

■ Big picture

Purpose: your story/your why

Values: your shared values

Organization: how you organize yourself and make changes to your governance

Clients: who you prefer to work with (and not work with)

Rituals: the rituals and routines you follow

■ Building and strengthening the team

Hiring: how you go about expanding your team

Diversity: your beliefs about diversity and how you build a diverse team

Professional development: how you support each other to grow your skills and experiences

Exiting: your shared understanding of how and when members leave your team

■ Coworking

Updating agreements: how you update your shared agreements

Location: shared expectations for time spent in office and how you work remotely

Time away: Managing vacation, leaves and absences

Performance: your shared performance expectations

Feedback: how you give and receive feedback

Conflict: managing interpersonal tensions

Health and safety: how you keep your team safe

Quality control: your shared quality expectations for customer deliverables

Technology: the technology you agree to use to make working together easier

■ Information and communication

Communication: how you communicate with each other, your customers and your partners

Branding: how you use your branding and market your offerings

Transparency: what you share and how you share it

Confidentiality: your shared understanding about how you manage confidential information

Intellectual property: your shared understanding of what belongs to and remains with the organization

■ Social responsibility

Sustainability: how you support a sustainable world

Giving: how you get involved in your local community and give back



As you may notice, co-created team agreements have a different feel. Consider this introduction from a traditional handbook:

The purpose of this handbook is to provide employees with an overview and understanding of the core policies that underlie the employment relationship with the company. While it is not possible to cover every situation that employees will face, there are certain basic principles to which every employee must adhere during their course of employment with us. These provisions apply in all jurisdictions where we may conduct business now and in the future.

The policies, practices and benefits, including those described in the handbook, may change from time to time. Management reserves the right to amend, modify, rescind, delete, supplement or add to the provisions of this handbook as appropriate.

Now compare that with an introduction from another handbook:

This set of agreements is written by our team for our team. While this handbook is written primarily for those of us who are employees and ongoing contractors, many sections may prove useful to others in our ecosystem.

In creating this handbook, we avoided as much legal jargon as possible and focused instead on the kinds of relationships we'd like to have with each other. In some cases, we've had to keep the legal jargon to interface with the outside world.

In signing on to our handbook, you are giving an enthusiastic thumbs-up to our culture, values and agreements. Welcome! We think you're going to like it here.

Can you feel the difference? The first is written to protect and the second to clarify, align and unite. Much of the legalistic framing of agreements is left over from a different era and unnecessary.

Check out the following open handbooks and get inspired. They make them public to inspire you to take the sections that you like. Notice that none of them have all the sections that we listed above. If you're feeling overwhelmed, that's normal. Don't try and do it all. Pick 3-5 sections that you think if you clarified would have the biggest short term benefit. Co-create those together. Often these are some of the easiest sections to write. Capturing the technology the team loves to use right now helps new people come up to speed much faster. Talking about aims for transparency can be short and also help people make better decisions across the organization.

- [Valve](#) - Probably the most well known for running in a company without bosses. Just like any company there are pros and cons of the way Valve has chosen to operate.
- [Netflix Culture Deck](#) - Another well known example of defining how things work publicly. The powerpoint is now in written form on their website
- [Trello Handbook](#) - Cleverly done using Trello. Wonderful for quickly grouping lots of information. Wonderful to snag sections from that you might want.
- [GitLab Handbook](#) is especially relevant for people working in remote teams — they have more than 800 staff in 50+ countries, and no central location.
- [Software Mill](#) is a fully-remote company of 50+ people. Their handbook is particularly good on decision-making and communication in a remote team.
- [Equal Experts Advice Process](#) - Equal Experts is a software consultancy of 2000+ people based largely in Europe. This is their main decision making tool. Here's a simplified, general view.
- [Loomio Handbook](#) - Loomio is a software company focused on helping groups make better decisions
- [Greaterthan Handbook](#) - Greaterthan is an organizational consultancy
- [Crisp operating model](#) - Crisp is a self-organising company of 35+ autonomous consultants. They do cool things with money and ownership.
- [Gini Handbook](#) - Gini is a tech company in Germany. The Gini Handbook is particularly strong on decision-making, with useful sections on communication skills, personal growth, and feedback.
- [Open Buffer](#) - Buffer is a software company that helps you manage social media posting. Although not a handbook, this is long list of articles, salary transparency, and other things that anyone can leverage to better understand a nuanced perspective to openness.
- [ET Group Handbook](#) - ET Group is a Toronto-based technology integration company
- [Enspiral Handbook](#) - Enspiral is primarily a New Zealand-based collective of entrepreneurs, changemakers and activists collaborating on initiatives, projects and world-changing ventures. Several of the handbooks below are Enspiral Ventures, including Loomio, and GreatherThan.



Our Success or Stagnation depends on the level of Agreement that we have with the people around us.

-Dr Paul Gitwaza