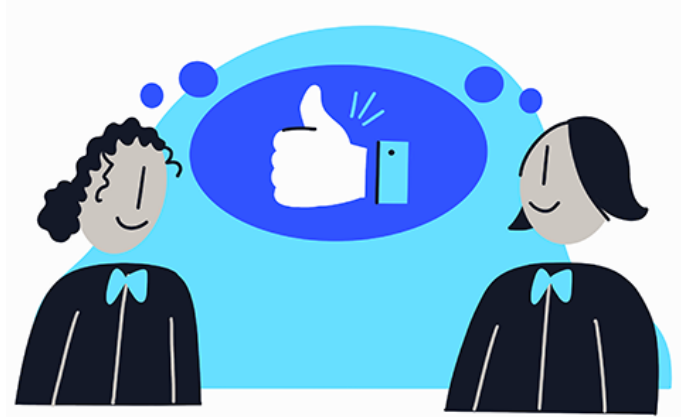


## 5 steps to a win-win agreement: Find a way forward with a colleague

When your interests overlap with a coworker's, if you don't align with the other person from the start on what a great outcome looks like, it could lead to *Why did you do that?*, *That's not what I needed!*, or *That won't work and here's why.*



Instead, get clear on what both of you need and how you'll achieve those needs by creating what Stephen R. Covey called a “win-win agreement.” Win-win agreements can help in just about any situation, including when you're:

- Doing a project together Trying to solve a similar problem
- Supporting one another's professional development

When you consider what the other person needs, they're more likely to consider what you need, too. And when you agree on a way forward together, you're both more likely to follow through.

Fill out our [Create a win-win agreement](#) tool as you go.

### 1. Define what a win looks like for you.

When you take time to articulate what you want from the situation, you'll clarify it for yourself—and be able to explain it to the other person.

To do it:

- **Be specific about what a great outcome—a win—is for you.** Phrases like “more resources” may be too generic to be useful. Ask yourself, *How will I know when this situation is a success?* For example, if you want your manager’s support for your professional development, a win for you might be:
  - More responsibility to lead projects than you’ve had before
  - The time and budget to learn new technical skills
  - Help from your boss on a plan to move from role X to role Y
- **If you have a long list of wins, divide it into “musts” and “maybes.”** Ask yourself, *What are the most important outcomes for me?* And consider how the items align with your larger goals. For example, you might decide to prioritize learning new technical skills because that could help you build a case later for changing your role.

## 2. List what you think a win looks like for the other person.

Start this step from a place of empathy—you want them, not just you, to get to a great outcome. And by considering their needs, you’ll be more likely to find a solution everyone embraces.

To do it:

- **Ask yourself prompting questions to get specific about their win.** Consider what you know about their needs, goals, and challenges. For example:
  - *What does my manager value?* My boss values their time and needs to balance leading multiple projects.
  - *What problems are they facing?* My manager and teammates don’t have the expertise to use a new piece of technology that could streamline work.
- **If you don’t have enough information, ask the other person.** Use questions like, *“What would a great outcome look like for you?”* For example, you might ask your manager, *“What skills could I develop that would most help you and our team?”*

## 3. Meet with the person to talk through their wins and yours.

Thinking about what might benefit the other person is a great start, but if you don't check with them, your assumptions could be totally wrong. Plus, letting them know what a win is for *you* means they won't be blindsided by your expectations.

To do it:

- **Discuss what a win looks like for them.** Doing so shows you care about their perspective, and it can put them in the right mindset to find a win-win solution. On your draft list of their wins, note what's important, remove what's not, and add things you missed as you talk.
- **Share what a win looks like for you.** If needed, explain why you're aiming for those things. For example, you might tell your boss why you feel ready to take on more responsibility and learn new skills.

#### 4. Work together to agree on what wins to pursue and how.

Deciding together helps ensure you're both satisfied with what you are agreeing to—and that you each know what to do next.

To do it:

- **See where your wins align.** Those outcomes should be easy to agree on. For example, training you on the new piece of technology is a mutual win for you and your boss because doing so could help you grow and help your team streamline work.
- **Where your wins don't align, decide what's feasible to do.** Consider time and resource constraints and larger priorities. You might modify a win, agree not to do it, or even pause the conversation entirely (for now, at least) rather than agree to things that would negatively impact you. For example, your manager feels you need more experience before taking on large projects, so you decide that you'll start by shadowing them as they lead their next big project.
- **Once you agree on how to move forward, write a short summary of your agreement and commit to it.** You can also each write your name on the agreement document and note the date to help you stay accountable. Be sure each person gets a copy of the agreement.

## 5. Uphold your part of the agreement—and follow up with the other person about theirs.

An agreement is just a piece of paper if there's no action to back it up. The best way to ensure the agreement is a success is to follow through on what you said you'd do—and support the other person as they do their part.

To do it:

- **Schedule time in your calendar to carry out your portion of the agreement.**
- **Set regular times to check in with the other person about the agreement.** You don't want to be controlling—but don't just disappear and assume that everything is going smoothly either. Set a cadence to check in about:
  - How things are progressing for both of you
  - Challenges you both are facing and any support you can give
  - Whether to adjust the agreement, especially if the situation changes