

Collaboration Agreement Worksheet

Defining the critical elements of a successful collaboration

Great collaboration requires clear agreements. The more complex and challenging the situation, the more critical these agreements are.

For a simple collaborative effort, just do a quick review and capture your agreements quickly on the relevant points. Don't overthink it!

For a more complex, long-term engagement, take your time and set a strong foundation for success.

Get the hard questions on the table early while goodwill is high, and before misunderstandings occur.

Work through these six elements together as a team, and capture what you agree on. Treat it as a living document, and revisit it as the work evolves.

The six elements:

1. Scope

3. Resources

5. Ownership

2. Roles

4. Decision-Making

6. Accountability

1. Purpose & Scope

Get aligned on the why and the what before the how.

- What is the purpose for our collaborative effort? What are we creating together, and what does success look like?
- Why does this matter to each partner - what does each hope to gain?
- What is in scope, and what is out of scope?
- What is our timeline, and what are the key milestones?

Tip: *if you cannot state the shared goal in one sentence you all agree on, start there.*

Our agreements:

2. Roles & Responsibilities

Clarity on who owns what prevents gaps and overlaps.

- What are the major areas of work, and who leads each one?
- Where do responsibilities overlap, and how will we manage the hand-offs?
- What does each partner expect of the others day to day?
- Who is the overall coordinator or single point of contact?

Our agreements:

3. Resources

Name what each partner brings, and how shared resources are governed.

- What does each partner contribute (people, time, budget, tools, IP, relationships)?
- Which resources are shared, and which stay with one partner?
- Who approves the use or spending of shared resources, and up to what limit?
- What happens if a partner cannot deliver a resource they committed?

Our agreements:

4. Decision-Making

Decide how you will decide - before you are in the heat of a hard call.

- Which decisions are made jointly, and which are delegated to individuals?
- How will we make joint decisions - consensus, majority, or lead-decides-after-input?
- Who holds ultimate authority if we cannot agree - overall, and by area?
- How will we handle a disagreement or a deadlock?

Our agreements:

5. Ownership

Who owns the result - the deliverable and any IP - and what each keeps at the end.

Note: this is about owning the result (the asset) - distinct from Decision-Making, which is about who has authority while you work.

- Who owns the final deliverable and any IP created (jointly, by contribution, or one partner)?
- If we part ways, what does each partner keep or walk away owning?
- Who controls how the work, or any shared brand and materials, may be used going forward?
- Are there confidentiality or non-compete considerations?

Our agreements:

6. Accountability

How we stay on track, share credit when it goes well, and handle it fairly when it does not.

- How will we track progress and hold each other accountable (cadence, check-ins, shared view)?
- When things go well, how do we share credit and recognition fairly?
- If a partner underdelivers, how do we raise it early - and what are the consequences?
- Worst case - how do we pause or dissolve fairly, and who keeps what?

A good test: would this still feel fair to every partner if the collaboration ended tomorrow?

Our agreements:

Our Commitments

By capturing our agreements above, we commit to honoring them - and to raising concerns early and directly as the work evolves.

Name / Line of Business

Date: _____

A Simple Example

The "Northstar Onboarding Initiative" brought together three partners from different lines of business - Product, Marketing, and Customer Support - to redesign the new-customer onboarding experience.

Scope

Cut first-30-day drop-off by 20% by Q4. In scope: onboarding emails, the in-app welcome flow, and support scripts. Out of scope: pricing and the sales process.

Roles

Product leads the in-app flow; Marketing leads messaging and emails; Support leads scripts and training. Dana (Product PM) is the overall coordinator.

Resources

Product gives two engineers and a designer; Marketing a copywriter and the email platform; Support three SMEs and training time. A shared \$40,000 budget is managed by Dana up to \$5,000 per decision; above that, the VP approves.

Decision-Making

Design decisions are made jointly at a weekly sync by consensus; if stuck, Dana decides after hearing all input. The sponsoring VP of Operations holds final authority on budget and scope.

Ownership

The onboarding experience is owned jointly by the three teams under Operations. Each team keeps its own assets - code, copy, scripts - and controls their reuse.

Accountability

Progress is tracked on a shared dashboard and weekly sync. When it goes well, all three teams are named in the launch readout and the leads co-present. A missed commitment is raised at the sync and re-planned; if the initiative pauses, each team keeps its own assets and the learnings are documented.