

Communication & Collaboration Operating Standards

Purpose

As organizations grow, communication volume increases exponentially. Without clear operating standards, teams lose time, create confusion, duplicate effort, miss priorities, and slow execution.

These standards exist to:

- Improve speed and responsiveness
- Reduce unnecessary meetings and emails
- Protect productivity and focus time
- Improve clarity and accountability
- Reduce confusion and organizational friction
- Use communication channels appropriately

The objective is not rigidity. The objective is operational effectiveness.

Core Communication Principles

- **Use the right communication tool:** Match the communication method to the urgency, complexity, and sensitivity of the situation.
- **Optimize for clarity and speed:** Communication should accelerate decisions and execution, not slow them down.
- **Respect people's time and focus:** Every interruption, meeting, and email carries a productivity cost.
- **Resolve complexity through conversation:** Avoid long chains of emails or messages when a quick discussion would solve the issue faster.
- **Reduce organizational noise:** Minimize unnecessary recipients, meetings, and communication traffic whenever possible.
- **Escalate urgency directly:** Urgent issues should be handled through direct communication, not repeated emails.
- **Drive action and accountability:** Meetings and communication should produce decisions, ownership, and next steps.

Meeting & Call Standards

- **1. Timing:** Start meetings on time and end 3–5 minutes early whenever possible to allow transition time between calls and meetings.
- **2. Ownership:** Every meeting must have an owner. The owner is responsible for setting the agenda, assigning rough timing to topics, keeping the meeting moving, redirecting tangents into a parking lot, and ensuring decisions and next steps are clear.
- **3. Objective:** Every meeting should have a clearly defined purpose, desired outcome, or decision objective before the invite is sent.
- **4. Attendance:** Only invite individuals who will actively contribute or receive meaningful value for more than 50% of the meeting. If someone critically needs to attend but will not contribute or benefit for most of the session, the agenda is likely too broad and should be separated into multiple meetings.
- **5. Representation:** Avoid inviting entire departments or teams when one representative can effectively represent the function.

- **6. Duration:** Fight the urge to default to 30- or 60-minute blocks. If the meeting can be accomplished in 20 minutes, schedule 20 minutes. Use meeting durations intentionally.
- **7. Agenda Discipline:** Stay on agenda. Meeting owners are responsible for ensuring the agenda topics are reasonably timed, managing that time, and preventing off-topic drift.
- **8. Parking Lot:** Non-critical, unrelated, or tangent discussions should be moved into a parking lot for separate follow-up discussion.
- **9. Calendar Blocking:** Blocking time for focused project work is encouraged, but avoid marking that time as Busy or Out of Office in ways that unnecessarily restrict scheduling access. Overblocking calendars creates organizational delays and scheduling bottlenecks. Project work can often be flexed into available space when needed.
- **10. Double Booking:** Avoid double-booking invitees. If someone is genuinely needed and already committed, contact them directly to determine whether reprioritization is appropriate.
- **Pontification:** Meeting owner is in charge and responsible for cutting off participants who get too wordy. Polite is always best. Don't be the story-teller. If you are the one getting cut off, own it and don't blame the other person.

Email Standards

- **1. Conciseness:** Keep emails concise. Use short paragraphs or bullets. No one wants to read your novel.
- **2. Ping Count:** If a discussion is likely to require more than 3 rounds of replies, move to a call or meeting.
- **3. Urgency:** If a response is needed within hours or the same day, do not rely on email. Call or text.
- **4. Sensitivity:** Do not use email for negative feedback, disciplinary topics, emotionally charged discussions, or controversial subjects. Live conversation is almost always more effective.
- **5. Reply All:** Only use "Reply All" when all recipients genuinely need the information.
- **6. Thread Integrity:** If a conversation should remain centralized, avoid branching discussions into separate side emails. Call or text instead to preserve a single source of communication.
- **7. TO vs CC:** The TO line is for individuals who own actions, responses, decisions, or accountability. CC recipients are included for awareness only.
- **8. Subject Line Clarity:** If action or response is required, clearly identify it in the subject line or first sentence using labels such as **Response Required**, **Action Needed**, or my favorite *****Urgent*****.
- **9. Action Visibility:** Never bury required actions, decisions, or next steps deep within the body of an email.
- **10. Response Expectations:** Individuals in the TO line are expected to respond within one business day or acknowledge receipt with expected timing for follow-up.
- **11. Escalation:** If no response after one follow-up, escalate to direct communication. Pick up the phone.
- **12. CC Volume:** Only CC individuals who truly need visibility. Anything more is just noise and waste.
- **13. CC Expectations:** Individuals who are CC'd are not expected to respond unless specifically requested.
- **14. Distribution Management:** Employees are encouraged to respectfully ask to be removed from recurring unnecessary email chains.

Text Messaging Standards

- **1. Speed & Coordination:** Use text messaging for quick coordination, urgent awareness, and time-sensitive action requests.

- **2. Brevity:** If communication requires more than a few bullets or explanations, send an email or pick up the phone.
- **3. Back-and-Forth:** If a text conversation becomes lengthy or requires clarification, transition to a call.
- **4. Sensitivity:** Negative, emotional, disciplinary, or controversial conversations should not occur through text messaging.

Leadership Expectations

- **1. Leadership Modeling:** Leaders are expected to model these standards consistently. Organizational communication habits typically follow leadership behavior.
- **2. Reinforcement:** Leaders are responsible for reinforcing communication discipline that improves speed, clarity, accountability, and execution quality.

Final Principle

The goal is not more communication. The goal is better communication:

- Faster decisions
- Less confusion
- Higher accountability
- Better execution
- More productive teams
- Less organizational noise