



CREATING COLLABORATIVE ENVIRONMENTS

INDIANA CPA SOCIETY

CREATING COLLABORATIVE ENVIRONMENTS

FOUNDATION



Trust

Keep commitments. Be transparent.
Assume positive intent.



Clarity

Define expectations, roles, deadlines,
and desired outcomes.



Accountability

Follow through, address issues early,
and close the loop.



Shared Purpose

Connect daily work to the organization's
mission and goals.



- ☒ Clarify before you commit.
- ☒ Ask questions before making assumptions.
- ☒ Share information early.
- ☒ Give feedback while it is still useful.
- ☒ Recognize collaborative behaviors in addition to individual accomplishments.

QUESTIONS BEFORE EVERY MEETING

What decision are we making?

Who needs to be involved?

Who owns the next step?

How will we communicate the outcome?

THE COLLABORATION CHECK



Before sending an email or Teams message, ask:

- ☐ Is my **purpose** clear?
- ☐ Have I identified the **owner**?
- ☐ Did I include a **realistic deadline**?
- ☐ Will the recipient know **exactly what I need**?

→ Clarity isn't found. It's built.

-Ben Botes