

The Guiding Principles Worksheet

*A framework for writing down the calls you'd make yourself —
so your team can make them without you.*



Adaptive · Predictive · Delivered

How to Use the Guiding Principles Worksheet

Worksheet Overview

Guiding principles are short, plain statements — a name and one line — that tell your team how you want decisions made when you're not there to make the call yourself. This is something you and your fellow leaders write together, not something handed to you from outside. You'll name the behaviors that matter, turn them into a short list, and test them against a real decision before you call it done.

Getting Started

1. Name the Behaviors. As a leadership team, name what “handled well” actually looks like day to day on this initiative — and what you're tired of seeing.

2. Borrow, Then Adapt. Start from the worked examples on the next page. Which ones sound like something you'd already say out loud? Which ones miss what actually matters here?

3. Turn Behaviors Into Principles. Short name, one-line statement, the way your team would actually say it.

4. Test It On a Real Decision. Pick something from the last month. Would this principle have made the call faster? If not, sharpen it.

5. Keep It Short. Six to eight is plenty — more than that and nobody remembers them.

Facilitation Tips

- You'll know it's working when your team starts quoting it back to you unprompted.
- Don't wordsmith alone — the room needs to hear itself in the final wording.
- Expect to revise once or twice as real decisions test it.

After You Choose

- Walk the team through them yourselves — don't just post them somewhere and hope.
- Repeat them the same way in every meeting; don't let them get softened department by department.
- Revisit when a decision doesn't fit cleanly — that's the principle telling you it needs sharpening, not the team getting it wrong.

Which initiative or team is this for?

New Account Opening Platform Rollout

1

3

Principle

What It Says

Member First, Not Last

When a call could go either way, whichever option serves the member's experience wins.

Exam-Ready, Always

We build as if the examiner walks in tomorrow, not the week before.

Ask the Branch

Anyone at the counter should recognize their own workflow in what we build.

Say It Once, Say It Everywhere

What leadership commits to here gets repeated the same way in every meeting, not softened department by department.

2

Decision we faced

IT wanted to delay member-facing changes until after exam season; ops wanted to launch now.

Principle we applied

Exam-Ready, Always.

What it decided

We build like the examiner's already scheduled — no reason to wait, so the team kept the original timeline.

4



Which initiative or team is this for?

Principle	What It Says

Decision we faced	
Principle we applied	
What it decided	



Guiding Principles Worksheet

Bringing It All Together

This worksheet gives you the guardrails — it doesn't run the rollout for you. Get comfortable with the principles yourselves first, then walk the team through them. Once the team's working from the same short list, decisions that used to land on your desk start getting made a level down — and you get more time back for strategy instead of execution details.

- **Give your team a decision** they can make without escalating it to you.
- **Turn “check with leadership”** into “we already know what leadership would say.”
- **Cut the number** of small decisions quietly waiting on your calendar.
- **Make sure new leaders** inherit judgment, not just a title.

You'll know these are working when you hear your own team repeat them back to you in a meeting you're not in.

Want a Second Set of Eyes on Your Guiding Principles?

Contact Metagyre to learn how we support leadership teams building this kind of judgment — from guiding principles through the governance board that puts them to use.

