



TEAM **LEADER** TOOLS

# Team Charter Tool



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# Team Charter Tool

## Overview

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### What and Why

The team charter is the job description for the team. It should help capture, document, and communicate the team's identity. The six P's referred to in the Team Launch Tool provide an excellent outline or template for composing the team charter.

### How

The following key actions can help you lead your team in developing a clear and compelling Team Charter.

1. **DISCUSS** as a team each key aspect of the Team Charter (the Six P's for example). Also consider discussing with key stakeholders.
2. **DOCUMENT** the key points that you discuss and agree to. Create a document structure that will work well for your team.
3. **DISTRIBUTE** the Team Charter document to each team member and each key stakeholder.
4. **DO** what is on the Team Charter. Use the Team Charter to guide the work and actions of the team every day.
5. **REVIEW, REVISE, and RENEW** the Team Charter. Periodically review how well the Team Charter is working for the team and how well the team is working in alignment to the Charter. Revise the Team Charter as necessary. Renew the commitment of team members and key stakeholders to the Charter.

# The Six P's

Use these six P's to structure your team charter.

## 1 PURPOSE

The purpose should explain why the team exists and what value the team provides to its customers and the organization.

### Key Questions

- What is our team's purpose? Why does our team exist?
- What value does our team create and to whom does it provide that value?
- What is the philosophy by which we operate?
- What are we doing well as a team to clarify and live by our team's purpose?

## 2 PEOPLE

The team identifies with the people who have the most impact on the team's success. Team members identify with each other. They also identify with the team's sponsor and key stakeholders.

- Who are the core members of the team? What do they each contribute to the team?
- Who is the team's sponsor? What does the sponsor expect?
- Who are the team's key stakeholders? What do they expect?
- What do we need and expect from our stakeholders?

## 3 PRIORITIES

Priorities help the team establish what is most important. They define both results and behavior. Team priorities help form the basis for goal setting, planning, and decision making.

- What are the three to five top priorities for our team?
- Are these priorities in line with the team's purpose and the expectations of key stakeholders?
- Are we in agreement on these priorities as a team?
- Can we write SMART goals for each priority?

## 4 PARAMETERS

The purpose should explain why the team exists and what value the team provides to its customers and the organization.

- What is the scope of our team? What are the boundaries?
- What kind of authority do we have and NOT have?
- What are the key policies/procedures that we must abide by?
- What is our budget and resources?
- What other parameters must we work within?

## 5 PROCESSES

Processes include the steps, methods, and communication that the team employs to achieve results. The team should know them well and continually work to improve them.

- What are the key processes that our team utilizes to accomplish its purpose and its goals?
- Are we clear on how each key process currently works?
- Are there immediate opportunities to clarify or improve any of these processes?

## 6 PROGRESS

The team defines how it will measure and track progress. Team members should have a clear idea of what success looks like.

- What key measures can we use to track progress?
- How can we best display our team's progress toward goals?
- How can we keep measures current, relevant, and visible?
- How can we best review and discuss our progress?



# Team Identity

## Worksheet

**Team Name**

**Date**

**Purpose**

**People**

**Parameters**

**Priorities**

**Processes**

**Progress**



# Writing the Team Charter

## Team Discussion Questions

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### KEY QUESTIONS

Here are a few questions to consider when discussing how you will actually create and use the team charter.

- Have we sufficiently discussed the content of the charter?
- Who will write a draft of the charter?
- How will the draft get written?
- Do we have the necessary input and approvals from key stakeholders?
- How will we review and refine the charter over time?
- How will we get a copy of the charter to each team member?
- How will we use and apply the charter on a regular basis?

