

***Knowledge Bites***

**Template**

Team Charter

***Navanter***

**What is a Team Charter?**

A team charter is a document, jointly developed by the leader and members of a team, which helps a team to develop cohesively, with a focus on improving team performance. It is a set of self-defined rules for how the team operates, which enables the members of the team to:

1. Interact with each other in a way which drives team performance.
2. Navigate uncertainty and ambiguity.
3. Feel an increased sense of ownership to the team’s success.

There’s no single way to create a team charter – it can have many elements depending on the situation, function of the team, and culture of the organisation.

There are, however, certain categories which are helpful to look at in any team charter, for example:

1. **Mission:** Why the team exists
2. **Vision:** What the team aspires to achieve in the future
3. **Values:** Beliefs and principles which govern how the team acts
4. **Roles:** Defining responsibilities and describing members’ USCs
5. **Expectations:** How the team will interact, hold each other to account, and support each

other

1. **Operation:** Conflict resolution, meeting structures, decision-making norms

This template is designed for you to edit yourself as you see fit, in order to facilitate a collaborative workshop where you develop a charter that works for the team(s) which *you* are a part of.

Need some help implementing this tool in your business? Contact us through our website at [www.knowledgebites.co.uk](http://www.knowledgebites.co.uk) and see how we can help.

**Part 1: Mission**

**Why do we exist as a team?**

* What do we contribute to the organisation?
* How do we fit into the customer journey?
* What do others rely on us for?

**What do we want the current team to be remembered for?**

* What do we excel at?
* How can we highlight our successes?
* How can this group of team members leave a legacy?

**What’s our As-Is?**

* How are we perceived by various stakeholder groups?
* Whose radar are we on?
* Whose radar are we not on?

**How can we achieve our To-Be?**

* How do we want to be perceived by various stakeholder groups?
* What do we need to do differently to achieve this perception goal?
* What are our unproductive behaviours and how can we minimise them?

**Other categories and questions…**

* …
* …
* …

**Part 2: Vision**

**What do we want to achieve?**

* What value can we provide to other teams?
* What would make our team satisfied with our performance?
* What would stretch us?

**What impact will we have?**

* How will we measure our impact?
* How will we measure team member satisfaction?
* How can we use our vision to increase ownership amongst team members?

**Other categories and questions…**

* …
* …
* …

**Part 3: Values**

**What are our members’ values?**

* What’s important to different team members?
* What do we each personally get from being in the team?
* How can we more closely align to our team members’ priorities?

**What’s our team identity?**

* What does our team stand for?
* Why is that important to us?
* What measures do we use for our own success?

**Other categories and questions…**

* …
* …
* …

**Part 4: Roles**

|  |  |  |  |
| --- | --- | --- | --- |
| **Team member name** | **What do I personally bring to the team?** | **What is my role in the team?** | **What do I need from the team to succeed?** |
| Team member A name |  |  |  |
| Team member B name |  |  |  |
| Team member C name |  |  |  |

**Other categories and questions…**

* …
* …
* …

**Part 5: Expectations**

**What do we expect of each other?**

* What do we need individuals to do?
* How do we each commit to behaving?
* How will we function as a group?

**How will we hold each other to account?**

* How do we deliver feedback?
* How do we receive feedback?
* How do we call out unproductive behaviours with other team members?

**Other categories and questions…**

* …
* …
* …

**Part 6: Operation**

**How will we work together?**

* What’s the best way to communicate with each other?
* What’s our agreed response time?
* How will we let others know we’re “off-line” for this team?
* Who will communicate with our various stakeholder groups?
* How will we communicate with different stakeholders?
* How often will we meet?
* What format will meetings take?
* What’s the ideal meeting length?
* How will we balance in-person v virtual meetings?
* What topics can be decided without holding a meeting?
* How will we track decisions and actions?

**How will we make decisions?**

* How will we make decisions?
* Will anyone have a veto over certain decisions?
* Which decisions need to be escalated? To whom?
* Which decisions can be made by individuals?

**How will we handle diverse opinions?**

* How will we handle different opinions?
* How will we resolve disagreements?
* What will we do if people don’t follow through on commitments?

**How will we handle conflict?**

* What will we do if conflict develops?
* How will we resolve the conflict effectively?
* Who else might we involve if necessary?
* What’s our conflict recognition and resolution process?

**Other categories and questions…**

* …
* …
* …

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