

Title	Team	Date	Ver.	NOBΞ
Team Charter			1.0	

## Introduction

A Team Charter helps make the implicit explicit. With a massive shift in remote working, team alignment on goals, processes, tools and ways of working is increasingly important. Use this template to gather team input and learn more about preferences so you can support your goals and each other effectively.

Try these steps especially if it's your first time or you're in need of a major refresh:

- Distribute the template ahead of time to the team along with any specific prompt questions you want them to think about *e.g. do we need to increase our security protocols? The team has scaled, do we need a new resourcing tool? What should be our response time expectations right now?*
- Book a 2-hour kick off session and a collaboration tool like Miro, Jam Board or Mural.
- Assign a Facilitator and Scribe to capture notes and outcomes, as well as adjustments to the Charter
- Work through each section, brainstorming and gathering inputs.
- Be prepared to discuss underlying assumptions and differences people may have - the conversations here are *at least as* important as the document
- Capture the items that the team agrees on and book follow-up sessions to talk more about those they don't or that you don't get to
- Assign further research needs (for new tools, etc) as needed
- Regroup to finalize and book a date to review again. This is a living document that should adapt with the team and their way of working.
- Run a retro on how things went!

# Customers

Whom does this team serve? What are their current and emerging needs?

Customer	Needs

# Team Purpose and Goals

What is our core work: the work that must be done above all else? Refer back to your customers' needs to make sure these align.

"Lights On" Work	"Bets"

What outcomes do we want to achieve, and how can we measure them?

Goal	Timing

# Strategy

What **bets** are we actively making in order to achieve our Team's Purpose? Phrase as [Even Over statements](#).

<i>E.g. Team recognition</i>	even over	<i>Individual recognition</i>
<i>E.g. Flawless execution</i>	even over	<i>Speed of execution</i>
	even over	
	even over	
	even over	

# Projects, Plans, and Metrics

What **projects** (think epics - large bodies of work) are underway to help us achieve our primary goals? Who is the person responsible for each?

Project	Lead

What **measures** do we use to ensure we are working towards our goals? What/How might we measure differently in these circumstances? How often do we check in on them?

Measure	Expected Results + Warning Signs

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## Who's Who

If you're missing clarity use our [role call](#) or role design worksheet.

Role	Role Purpose	Role rights - what decisions can you make?	Who plays this role on the team (Name)

## Important Meetings and Rituals

Event	Frequency	Objective

## Information Sharing

What **information** do we need to share on a day to day basis to move forward and achieve our goals? Where do we store it? Who updates it and how often?

Information	Where it lives	How and when we update

<i>E.g. Meeting Minutes</i>	<i>Posted in project slack channel</i>	

## Tools We Use

How do we connect with others and get work processed?

Tool	What we use it for
<i>E.g., Zoom</i>	

## Key Processes

Identify the five to nine critical steps in your most important or most frequent processes. Focus on “killer items” that are easy but dangerous to forget.

**Process 1:** \_\_\_\_\_

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**Process 2:** \_\_\_\_\_

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## Team Norms

Capture what's important to your team here, be as specific as possible e.g., *when* things happen as well as *what*.

What's important	Our team norms
Opening meetings in an inclusive and human way	<i>E.g. We check-in at the start of every meeting</i>