



Keyword: Team Charter

# Creating and Using Team Charters to Increase Team Successes

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by Kevin Eikenberry

## Creating Successful Team Charters

How many times have you been on, or heard about, a team that got frustrated? Or felt like they weren't making progress? Or weren't completely clear on what they were expected to do? Or didn't feel like they had support from those above them?

I bet you are nodding yes to one or more of the questions above.

Thousands of teams are formed in businesses around the world each day. And most of those teams flounder unnecessarily for too long (some flounder forever). There is one simple practice that can improve the results of most any team – team chartering.

## What is a Team Charter?

A charter is a document that describes the purpose, boundaries and agreements of the team. It serves as both guidance and a roadmap for any team's success. When used most effectively, this tool clarifies the purpose for the team's existence and documents the agreements amongst the team members.

Here are the seven reasons why a team chartering process will be of great benefit when forming any team.

- 1. Shows support and commitment.** One of the key components to an effective team charter is the identification of a team sponsor or a person outside of the team that can provide support and direction to the team. Many teams flounder because they don't have a "go to" person they can rely on when they get stuck or encounter obstacles. The team charter is one way for those sponsors to communicate their interest and support. The charter also provides the team with the assurance that such a person exists.
- 2. Sets team direction.** A good team charter will provide a team with the rationale and goals for the team. Often teams are formed without these ideas having been clearly defined. This is a problem not only for the creation of the team, but makes the work of the team exceedingly difficult. How do you know what to do when you don't know the specific goals and objectives you are supposed to achieve? If I could have only one component to any team charter it would be a clear definition of the direction, goals to be reached, and problems to be solved by the team.



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3. **Provides agreements and clarity.** Charters provide more than just overall direction and alignment to the organization's overall purpose. The best charters also provide a chance for the team itself to build agreements about how they will operate, make decisions, how often they will meet, and many other logistical issues.

4. **Structures and ensures an effective planning process.** Too often in our fast-paced world, teams move too quickly to building a solution because they think that immediate action is required. With this perspective they spend too little time in planning for successful action. A team chartering process, form, or checklist helps make sure a team plans successfully before moving forward. The time spent in planning initially will be repaid many times over during the life of the team - both in time saved and frustration avoided.

5. **Identifies roles.** Will the same person facilitate each meeting? Who is the team leader? Are there specific expectations of the team members? What roles will each individual play? Does every team member understand why they're there and what expertise they can provide? A team chartering process can help answer all of these questions, and thereby help any team be more successful more quickly.

6. **Outlines boundaries and scope.** Often teams wonder what's inside of their control and what is actually expected of them. A good chartering process should help a team understand what their boundaries are what their limitations are what parts of the problem they are responsible for etc.

7. **Sets resources.** Teams often wonder what about their level of authority. Can they hire consultants? Can they bring in outside experts? What is their budget? Can they bring in additional resources within the organization? A good chartering document will help set both the resource requirements and levels of authority the team has to acquire more resources when needed.

8. **Improves productivity, and the likelihood of successful outcome.** Okay, so there are more than seven. All of the first seven benefits lead to this one - the ultimate benefit of all. Successfully chartering will improve the likelihood that the team will be less frustrated take less time and create greater results.

### What is Included?

Because the power comes from the agreements that are reached, the format of the document itself is less important than the conversation. Whatever the format, team charters should address the following areas and answer the related questions:

**Purpose and Alignment.** Why is this team being formed? What purpose will it serve? What challenge, problem, issue or opportunity will it address? How is the work of this team in alignment with the larger goals and strategies of the organization?

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**Goals and Expectations.** What are the specific goals for this team? When will we know we have completed their work? Who are Customers and Stakeholders of the team's work? What are their needs and expectations? What are the obstacles or challenges that can be seen at the start? Make sure to state the goals clearly with measurable outcomes and time-lines.

**Roles.** Who is the team leader? What is their role? Who is responsible for facilitation, logistics, and information management? Who will be responsible for communication to stakeholders and the team sponsor? How will each person be involved in decision making?

**Approach.** How and when will the team meet? What are the norms or ground rules that the team will agree to? How we make decisions? How will we hold each other accountable for these things and for task completion? Who will communicate team progress and to whom? Your charter should also include a high level look at the major phases or milestones in the life of the team and outline those.

**Skills and expertise required.** Make a listing of the skills and expertise that will be required for team success. Identify the individual on the team that can provide those skills and perspectives. Identify any gaps in skills and determine a way to attach those skills to the team through other resources. Adding these skills doesn't mean you have to add people to the team. It means that subject matter experts can best be identified and invited to participate in the beginning and a charter helps make that happen.

**Resources needed.** What budget of time and money will be needed for this project? What other resources will be required?

**Authority.** What level of authority on spending does the team have? What authority do they have for other resources? What approvals will be required and by who?

**Agreement.** Once all of these questions and items have been documented, your charter should be signed by the team sponsor and each team member. This will cement the agreement and make it easier to hold people accountable. It also ensures that every team member understands and is on board with the complete charter.

### How do I Implement a Team Charter?

Because there is some structure required, typically a leader who is forming or sponsoring a team would initiate the process. If this doesn't happen in your organization don't use that as an excuse? Whatever your role you can gain support for having a conversation that leads you to the clarity and agreements that a charter will provide.

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Get the team together along with the leader who formed and/or is sponsoring your team. Have a conversation about the eight items above, documenting your agreements. You may be able to finalize a charter in one meeting, or it might require people to gather more information before finishing - do what makes sense given the size, complexity and importance of the team's output. Remember all time invested here will be repaid many times. Resist the urge and tendency to "get this done and get on with the work."

Once the document is created, have all parties sign it as a way to signify commitment to each other; remembering that you want to create something not as an exercise but as a living document for the team to use as both a guide and a roadmap. Then keep the document fresh by referring to it in team meetings and making sure that you stay on-track with the boundaries and guidance it provides. Recognize too that as time moves forward you may need to make adjustments, clarifications or changes to the charter. This is perfectly fine as long as all team members and the leader and sponsor are in agreement and "sign on" to the changes.

### Be Forewarned

Will creating a team charter take time?

Absolutely.

Will some people want to stop talking and get started?

For sure.

Recognize these facts but remember an even bigger one - when you invest the time to do a team charter, you will truly help the team as a whole be more successful. And you will also be providing a highly valued structure to help individual team members be less frustrated and more productive.



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