

Team Charter Worksheet

What is a team charter?

It is a simple working document that helps teams align on daily operational behaviors. It is designed to be flexible, evolving, and inclusive. The goal is to close alignment gaps and gain consensus on operational behaviors that work for everyone on the team. It gives teams insights into the way people prefer to work, helping to optimize team performance.

How to use the team charter worksheet:

This worksheet will help you and your distributed team get on the same page when working in a flexible dynamic environment.

*****Please make a copy or download this worksheet so you have your own.*****

The framework is simple...

For all the critical daily behaviors you and your team engage in, you will add a layer of ***proactive intentionality and alignment***.

Those critical daily behaviors are consolidated into 5 main categories:

- Performance and Productivity
- Communication and Collaboration
- Culture
- Health and Wellness
- Optimizing the Employee Experience

Once you engage in proactive intentionality and alignment, you will see rapid improvement in your team's workplace experience.

Below are the different categories you will fill out.

*Note - this is not an exhaustive list. So if there are categories or other operational behaviors you want to align with your team, you are encouraged to include them to meet your specific needs.

Section 1: Performance and Productivity - This section will help your team align on how effort and results are evaluated.

When measuring productivity and performance, we often evaluate effort and results. Breaking each of these elements down and coming to agreement with your team on how each will be evaluated will help your team focus on what matters.

Notes:

What metrics are employees tracking to measure performance and how are employees being held accountable?	Metrics:
	Accountability:

Effort - How is effort being measured and impacting individual and team performance?

Below are various contributions employees make that represent effort. While effort might not lead directly to results, these inputs are often reflected in employee and team evaluations. Write down how each of these inputs are being measured (if at all) and how it relates to performance.

Notes:

Hours worked	
Participation	
Value of ideas	
Going above and beyond job responsibilities	
Team player	

Results - How are results being measured and impacting individual and team performance?

Below are elements that help identify effectiveness. Write down how each of these elements are being measured (if at all) and how it relates to performance.

Notes:

Output	
Success Metrics	
Alignment	

Section 2: Communication and Collaboration -

This section will help your team align on communication and collaboration preferences.

The communication and collaboration scenarios below represent a few of the different work interactions your team will encounter. For each scenario, write down your preference on which communication platform you prefer to use, how in-sync you want to be when communicating with your team, and your preferred timeline or frequency of the communication activity.

Notes:

General Communication and Collaboration Preferences

Brainstorming

Communication platform:	
Asynchronous, Synchronous, or Blended:	
Timing:	

Tap on the shoulder questions

Communication platform:	
Asynchronous, Synchronous, or Blended:	

Timing:	
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Project discussions

Communication platform:	
Asynchronous, Synchronous, or Blended:	
Timing:	

Status updates

Communication platform:	
Asynchronous, Synchronous, or Blended:	
Timing:	

1-1 Check-ins

Communication platform:	
Asynchronous, Synchronous, or Blended:	
Timing:	

Urgent items

Communication platform:	
Asynchronous, Synchronous, or Blended:	
Timing:	

Shared Documents Preferences

When working on a shared document, like a google doc, what is your protocol for how you interact with the document, share feedback, and collaborate.

Notes:

Type of edits - Do you make edits directly, use track changes, have multiple people editing at the same time etc.?	
Type of comments - Do you know what type of comments are encouraged, do you know what you should be commenting on and the type of feedback expected of you?	
Response timelines and expectations - Are there guidelines on how quickly comments should be responded to, are comments assigned, how are they prioritized etc?	
Version control - Is someone keeping track of different iterations of a document in case you need to revert back? Is that important?	

Internal Tool Preferences

List the internal tools you use for each type of internal collaboration and write your individual and team preferences for each. Your individual preferences are how you like to use the tool and the team preferences refer to how you want the team to use the tool together.

Also include what your terms of engagement preferences are, for example, what tool engagement guidelines would help you and your team with daily workflows.

Notes:

Project management tools (Asana, Trello, Basecamp etc)

Tool 1 -

What does ideal look like for you as an individual?	
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What does ideal look like for you as a team?	
Terms of engagement for you and your team.	

Tool 2 -

What does ideal look like for you as an individual?	
What does ideal look like for you as a team?	
Terms of engagement for you and your team.	

Communication tools (email, Slack, Microsoft teams, Zoom etc)

Tool 1

What does ideal look like for you as an individual?	
What does ideal look like for you as a team?	
Terms of engagement for you and your team.	

Tool 2 -

What does ideal look like for you as an individual?	
What does ideal look like for you as a team?	
Terms of engagement for you and your team.	

Collaboration tools (Google docs, Microsoft 360, Notion etc.)

Tool 1

What does ideal look like for you as an individual?	
What does ideal look like for you as a team?	
Terms of engagement for you and your team.	

Tool 2 -

What does ideal look like for you as an individual?	
What does ideal look like for you as a team?	
Terms of engagement for you and your team.	

Feedback preferences

Feedback is an important part of staying aligned as a team, but not everyone's preferences around feedback are the same. This is a chance for people to describe how they would like to receive feedback for general work performance and on specific tasks.

Notes:

What type of feedback are you looking for?	General work: Tasks:
How do you prefer to receive feedback?	General work: Tasks:
How immediate or often are you looking for feedback?	General work: Tasks:

What communication platform do you prefer to receive feedback on?	General work: Tasks:
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Meeting preferences

List the elements of a meeting that would make them better, more engaging and more efficient. Describe your preferences for how to sculpt a better meeting culture on your team.

Below is a simple list of elements of a meeting that can be intentional and help transform your meetings. This is not an exhaustive list so feel free to add elements to the worksheet.

Notes:

Goals - Do all meetings have goals and should they?	
Permission to opt out/cancel - Does each person in the meeting have the option to opt out, or should they?	
Agenda - Do all meetings have an agenda and should they?	
Pre-work - Do all meetings have some pre-work to level set attendees before the meeting?	
Engagement from each person - does each meeting engage each person in attendance or should they?	
Social time at the beginning of a meeting - Should each meeting have some social element or should they?	
Meeting length - Should each meeting be 30 min or can they be 25 min, 15 min or 5 min?	

Scheduling - Can people just book an open time on your calendar or should you give consent first?	
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Section 3: Avoiding Bias and Building Culture -

This section will help your team align on team culture preferences.

Notes:

Write down 3-5 words that define your ideal work culture.

- 1.
- 2.
- 3.
- 4.
- 5.

Write down 3-5 behaviors that align with your ideal work culture.

- 1.
- 2.
- 3.
- 4.
- 5.

Write down 3-5 behaviors that don't align with your ideal work culture.

- 1.
- 2.
- 3.
- 4.
- 5.

Section 4: Employee Experience and Wellness -

This section will help your team align on team health and wellness preferences.

Notes:

Write down 3-5 words that define your ideal employee experience and feeling well at work.

- 1.
- 2.
- 3.
- 4.
- 5.

Write down 3-5 behaviors that align with your ideal employee experience and feeling well at work.

- 1.
- 2.
- 3.
- 4.
- 5.

Write down 3-5 behaviors that don't align with your ideal employee experience and feeling well at work.

- 1.
- 2.
- 3.
- 4.
- 5.

Bonus: Team Optimization - This section will help your team align on team optimization preferences.

Notes:

How often should we reflect on what is working and what isn't as a team?

What is the best way to give feedback about our process and how should that feedback be delivered?

