

TEAM PLANNING & CHARTERING FOR SUCCESSFUL DEVELOPMENT PROJECTS

Good planning and clear understandings are essential to an effective project team. Chartering is a collaborative planning exercise among the project sponsor, product manager, team leaders and team members. As part of the process of chartering, team members develop common understanding as they begin working.

Instructions for Sponsors, Product Managers, Team Leaders and Team Members: As you fill out each section below, consider the following questions. Use the draft charter as a way of staying on track, or of identifying when the task has changing and may need to be re-evaluated. Remember the Charter is always in draft and can be amended in response to changing conditions.

NOTE: If your project is large, of lengthy duration, mission critical or otherwise complex, we strongly recommend the assistance of an experienced facilitator in your initial chartering process.

PROJECT NAME:

PROJECT SPONSOR:

PRODUCT MANAGER/OWNER:

TEAM MEMBERS:

INITIAL CHARTER DATE:

Charter revision date:

Charter revision date:

Charter revision date:

Charter revision date:

VISION & PURPOSE

What do we intend to accomplish through this product? What are the desired business deliverables, results, outcomes, or effects? Define how the project fits with and contributes to the company vision.

MISSION & CUSTOMERS

Describe in 25 words or less why does the project and team exist. What value does its work add? What is its unique contribution? Who are the customers/users for the product, both internal and external? Who will use team outputs?

KEY RESULTS AREAS/SUCCESS CRITERIA and Performance Indicators

Given the project vision and mission, what will signal the internal and external success of the project? What performance measures will indicate success? (Set SMART Performance Indicators – Specific, Measurable, Meaningful, Realistic, Timely) What standards do you want to achieve in each area?

TEAM MEMBERS

How will the team be led? By whom? Who sponsors this project? Who are the product manager(s), project manager(s) and/or program manager(s)? Who is/are the coach(es) or team lead(s)? Who are the individuals with the right mix of skills, knowledge and experience to accomplish the work of the team?

BOUNDARIES, SCOPE & LIMITS

How does this project fit in context of other projects and other work? (Draw a Context Diagram, UML model or other visual representation.) What are the limits of authority regarding decision-making, budget impacts, and so on? What are the scope and limits of the task? How will the team manage changes to the scope?

Are there any other expectations about which the team should know? Are there initial specifications regarding the outcome? Are there initial specifications (overarching stories) regarding the outcome? How will requirements be defined and renegotiated if necessary?

RISK MANAGEMENT

For what Key Events should the project have a planned response? What risks can the team foresee? How will the team approach foreseeable opportunities and obstacles? How will the sponsors, product managers, project managers and team continuously manage risks?

COMMITTED RESOURCES

Where/how does the team secure the resources – personnel, money, time, access, environment, training, coaching, tools/equipment, permissions – it needs to proceed? What of these are already in place? What are the constraints? What is the timeline for securing additional resources?

VALUES

What are the sponsor's values and philosophy regarding the project mission? What are the project team's values for working together and accomplishing the mission? Are the two well-aligned?

PROJECT COMMUNITY

Who are the key parties and partners with regard to this task and team? Who are the authorizing players? Who owns the business obligations? Who makes "go/no go" decisions; i.e., who evaluates "work to date" and makes continuation decisions? Who are the other stakeholders; i.e., who will affect or be affected by the decisions or recommendations of the team? Who is the on-site representative of the customer and what is their availability?

KEY INTERACTIONS & COMMUNICATION PLAN

On what decisions do others want or need input? What actions will the team take to insure that key parties and partners are informed of the team's goals, objectives, schedule and progress? How does the work get reviewed and feedback communicated? How will the team continuously improve the product, methods, practices, and processes? How will the team reflect, capture wisdom, tune and adapt at iterations, releases, other milestones, and project end?

WORKING AGREEMENTS

What 3-5 agreements do you need about expectations for professional behavior when team members meet? How do you want to work together? What are the agreements about decision-making and enabling behaviors? What additional roles does the team need and who will fulfill them? Is there a metaphor that best fits this project and provides a way of thinking about the work and/or interactions?

Working Agreements also can include such issues as:

- Definitions of "Done"
- How we will handle coding standards
- Meeting time, frequency, agenda and minutes
- How facilitation and other team maintenance roles are provided
- How decisions are made (vote, consensus, other)
- How conflicts are dealt with/constructive confrontation
- How interpersonal feedback occurs
- Group processes and procedures
- Attendance and promptness
- Participation and contributions
- Confidentiality
- Analytic approach
- End-product orientation
- How communication/conversation takes place
- How members of the teamwork together and how the team operates.
- Continuous improvement/Retrospectives

PRELIMINARY SCHEDULE AND ACTION PLAN:

What is your first best guess of what it will take to accomplish the task? What particular milestones will serve as progress markers?

For distributed teams: What are your initial understandings and expectations about how frequently the team will need to get together to accomplish the task? If you will meet in real-time, how long should the meetings last? How much time will individuals, pairs, or sub-groups need between meetings to complete their contributions to the team? What additional constraints will distribution add to the work? How can the team mitigate those constraints?