THE TEAM CHECKLIST

This tool contains a checklist to use in establishing a successful team. It includes the team's purpose, norms of behavior, measures of success, team roles and responsibilities, and operating rules. This is a very useful tool for new teams, as well as for teams that are searching for a renewed sense of purpose.

Introduction

Successful teams have five things in place:

1. A clear sense of purpose
2. Measures of success
3. Clear roles and responsibilities
4. Operating rules
5. Well-understood norms of behavior

These are often incorporated into a team "charter" – a single document in which all five elements are written down. Use this checklist to help establish your own team charter.

Note: Using a qualified facilitator will help everyone take part and ensure team buy-in for each element of the charter.

Team Purpose

To establish the team's purpose, answer these questions:

- Why was this team put together in the first place?
- What is the fundamental purpose or mission of the team?
- What are the goals of the team?
- What else does the team want to achieve?
- What will the team be called?

Once you have the answers to these questions, write a succinct summary of the team's purpose, along with the team's mission and goals.

Success Indicators

Next we want to look at how the team will measure its success. Ask the following questions:

- What outcomes does the team want to achieve?
- How will the team know it is successful? (What measurements will it use?)
- How will our team evaluate the progress it is making?
- How often will we evaluate our team's progress?

Once you have answered each of these questions, you should be ready to document the team's success indicators.

Team Roles

Team roles should focus on decision making. Ask the following questions:

- To what extent will the team make decisions versus make recommendations?
- How will we make decisions? (Recommended tool: "The Five Types of Decisions")
- Who's responsible for clarifying the decision-making roles of the team and of team members if we're unclear?
- Is someone on the team responsible for making or managing major decisions?

The answers to these questions should be documented so that all members of the team can refer to them.

Operating Rules

Operating rules define the way the team manages itself. Ask the following questions:

- How will the team recognize one another and celebrate it successes?
- How will the team deal with poor performance by a team member?
- How often will the team meet?
- How will we build agendas?
- Who facilitates the meeting?
- What kind of meeting notes do we want?
- To whom are the notes distributed?

Again, the answers to these questions should be documented.

Team Norms

Team norms are the behaviors expected of each member of the team. Identifying them explicitly is critical to making the team function effectively.

- What are the behaviors essential to team success?
- How will the team members support and interact with one another?
- What will our meeting ground rules be? (Recommended tool: "Ground rules for productive conversations.")

Next Steps

- Write down the team's commitments in a charter. Distribute the charter to every team member.
- Regularly review these commitments. Ask the team: "Are we doing what we said we would?"
- Follow up in any areas where the team feels it needs to strengthen its commitments.