

How to Build a Team Charter

The precise format of team charters varies from situation to situation and team to team. And while the actual charter can take on many forms, much of the value of the Charter comes from thinking through and agreeing on the various elements.

Adapt the following elements to your team's situation.

1. Context.
2. Mission and Objectives.
3. Composition and Roles.
4. Authority and Boundaries.
5. Resources and Support.
6. Operations.
7. Negotiation and Agreement.

The Context of The Team Formation

This is the opening statement of the charter. It outlines the reasons behind the team's formation, the specific problem that the team aims to address, how this problem aligns with the overall goals of the organisation and the potential consequences that may arise if the problem is left unaddressed.

- What problem is being addressed?
- What result or delivery is expected?
- Why is this important?

Context:

The Operations Team at Sweet Slice Pie Shop aims to address inefficiencies in pie production and customer service. By streamlining operations and enhancing customer experience, we seek to increase customer satisfaction, improve profitability, and uphold Sweet Slice's reputation as a premier pie destination. Failing to address these issues may lead to customer dissatisfaction, loss of revenue, and reputational damage in the highly competitive pie market.

Mission and Objectives of the Team

This section is the core of the Charter as it defines the team's mission. Without a well-defined mission, team members may get sidetracked and pursue their own goals, disregarding the overarching objective.

The next step is to translate the mission into measurable goals and objectives. These critical targets and milestones will help keep the team on course.

When setting goals and objectives, using the SMART framework is helpful. SMART stands for Specific, Measurable, Attainable, Relevant, and Time-bound. This framework ensures that each objective can be measured, making monitoring progress and determining success easier.

Mission and Objectives:

We aim to deliver exceptional pie products and memorable experiences to our customers while maximising operational efficiency and profitability. To achieve this mission, the team will set measurable goals and objectives, including:

1. Increase customer satisfaction ratings by 15% within six months.
2. Reduce pie production costs by 10% through improved inventory management and waste reduction initiatives.
3. Implement a customer feedback system to address concerns and suggestions within 48 hours.
4. Achieve a 20% increase in pie sales within the next fiscal year.
5. These goals will guide the team's efforts and ensure alignment with Sweet Slice's goal of becoming a premier pie destination.

Composition and Roles.

To ensure a team's success, it is essential to identify the individuals needed to achieve the team's mission and objectives. Once the team members have been identified, it is essential to determine what each person will contribute to support the team in accomplishing its goals. Although this may seem like an excessive step during the initial stages of team formation, it will help match team members with appropriate roles and identify any gaps in skills or abilities required to reach its objectives.

The best way to do this is by listing each team member and defining their roles and responsibilities.

- Who will be the team leader?
- Who is the liaison between the team and the other stakeholders?
- Who is responsible for what duties and outcomes?

Composition and Roles:

- **Shop Manager (Team Leader):** Oversees overall operations, including staffing, scheduling, and customer service. Responsible for ensuring that the team's objectives are met and coordinating efforts to achieve them.
- **Head Baker:** Leads the baking team in preparing delicious pies according to Sweet Slice's recipes and quality standards. Ensures that pies are baked to perfection and meet customer expectations.
- **Front-of-House Staff:** Serve as liaisons between the team and customers. Greet and assist customers, take orders, process transactions, and maintain the cleanliness and ambience of the dining area.
- **Back-of-House Staff:** Assist with pie preparation, baking, packaging, and kitchen cleanliness. Collaborate with the Head Baker to ensure smooth pie production and timely customer delivery.
- **Inventory Manager:** Manages inventory levels, orders ingredients and supplies, and ensures efficient stock rotation to minimise waste. Works closely with the Shop Manager to optimise inventory and reduce costs.
- **Quality Assurance Officer:** Monitors product quality, conducts taste tests, and ensures compliance with food safety standards. Responsible for maintaining the highest standards of quality and consistency in Sweet Slice's pies.

Authority and Boundaries.

With the roles defined, you now need to look at what team members can and can't do to achieve the mission:

- How much time should team members allocate to the team's mission, and what priority do team activities have relative to other ongoing activities?
- How should team members resolve conflicts between their day jobs and the mission?
- What budget is available in terms of time and money?
- Can the team recruit new team members?
- What can the team do, what can it not do, and what does it need prior approval?

Authority and Boundaries:

- **Time Allocation and Priority:** Team members should allocate sufficient time to fulfill their roles and responsibilities within the team mission. Team activities have a high priority relative to other ongoing activities to ensure the timely achievement of objectives.
- **Conflict Resolution:** Conflicts between day jobs and the team mission should be addressed promptly and transparently. Team members are encouraged to communicate any conflicts or challenges to the Shop Manager for resolution, prioritizing the team's objectives while balancing other responsibilities.
- **Budget:** A budget is allocated for operational expenses, including ingredients, supplies, and staffing costs. Team members are expected to adhere to the budgetary constraints and seek approval from the Shop Manager for any significant expenses beyond the allocated budget.
- **Recruitment:** The team may recruit new members as needed to fill gaps in skills or meet increased demand. Recruitment decisions are made collaboratively, with input from the Shop Manager and other team members.
- **Authority and Approval:** The team is authorized to make operational decisions within their defined roles and responsibilities to achieve the mission. However, significant decisions impacting resources, policies, or strategic direction require prior approval from senior management or the Shop Manager. All team members are expected to operate within legal and ethical boundaries and seek guidance when unsure.

Resources and Support.

This section outlines the resources at the team's disposal to achieve its objectives. This comprises financial budgets, timeframes, equipment, and personnel. Furthermore, any adjustments required to the resources should be reviewed in conjunction with performance evaluations.

Moreover, it elucidates the training and coaching provisions available to the team to assist them in performing their duties.

Resources and Support:

- **Budget:** The team is allocated a budget for purchasing ingredients, supplies, and equipment necessary for pie production. Budgetary allocations are reviewed regularly to ensure alignment with the team's objectives and may be adjusted based on performance assessments and changing needs.
- **Time:** Team members are provided with dedicated time to fulfill their roles and responsibilities within the team. Regular team meetings and operational hours are scheduled to optimize productivity and ensure effective communication.
- **Equipment:** The team has access to state-of-the-art baking equipment, kitchen appliances, and tools necessary for pie production. Equipment maintenance and upgrades are coordinated by the Shop Manager to ensure smooth operations.
- **Staffing:** Adequate staffing levels are maintained to meet production demands and deliver excellent customer service. Additional support staff may be hired during peak periods or as needed to address workload fluctuations.
- **Training and Coaching:** Ongoing training and coaching support are provided to team members to enhance their skills and capabilities. Training sessions cover topics such as pie baking techniques, customer service excellence, and food safety practices. Coaching is available to address individual performance issues and promote continuous improvement within the team. Feedback mechanisms are established to solicit input from team members and identify areas for further development.

Operations.

This section explains the daily functioning of the team. The level of detail can vary depending on the situation. It may be comprehensive and detailed for long-term teams, while for short-term teams, it may be limited to a few bullet points.

Daily Routine:	<ul style="list-style-type: none"> ● Begin each day with a team huddle to discuss priorities, review the day's tasks, and address any concerns. ● Assign specific roles and responsibilities to team members based on the day's requirements. ● Start pie production according to the baking schedule, ensuring recipe adherence and quality standards. ● Concurrently, front-of-house staff greet customers, take orders, and maintain cleanliness in the dining area. ● Back-of-house staff assist with pie preparation, baking, packaging, and kitchen cleanliness. ● Inventory manager monitors ingredient levels and initiates reorders as necessary to avoid stockouts.
Customer Service:	<ul style="list-style-type: none"> ● Provide friendly and attentive customer service, answering questions and promptly addressing concerns. ● Handle customer orders accurately and efficiently, ensuring timely delivery of pies. ● Solicit customer feedback to identify improvement areas and address any issues promptly.
Quality Control:	<ul style="list-style-type: none"> ● Conduct regular quality checks on pies to ensure they meet Sweet Slice's taste, appearance, and freshness standards. ● Address any quality issues immediately, either by remaking pies or offering appropriate remedies to customers. ● Maintain strict adherence to food safety protocols and cleanliness standards in the kitchen and dining areas.
Communication and Collaboration:	<ul style="list-style-type: none"> ● Foster open communication among team members, encouraging sharing ideas, feedback, and best practices. ● Collaborate effectively with other departments, such as finance and marketing, to support overall business objectives. ● Hold regular team meetings to discuss operational updates, address challenges, and brainstorm solutions collaboratively.
End-of-Day Procedures:	<ul style="list-style-type: none"> ● Conduct a thorough cleanup of the kitchen and dining areas to maintain cleanliness and hygiene standards. ● Review inventory levels and update records to prepare for the next day's operations. ● Close out daily sales transactions and reconcile cash drawers. ● Debrief as a team to discuss successes, challenges, and opportunities for improvement and set priorities for the following day.

Negotiation and Agreement.

A successful Team Charter is developed through a negotiation process. The team's client establishes the context and mission, while objectives, composition, roles, boundaries, and resources are ideally determined through discussions between the sponsor, team leader, team, and other stakeholders. The last step is approval, where all team members sign off on the Charter, committing to its principles, roles, and responsibilities. This gesture symbolises full commitment to the mission and objectives, creating accountability to one another and the organisation.

When a Team Charter is negotiated at the beginning of a project, the team is set up for success. It ensures everyone understands why the project is necessary, the objectives, measures of success, and who is responsible for what with the available resources. Assertive negotiation of the Charter allows all parties to shape the project to increase its likelihood of success, resulting in a wholehearted commitment to its success.

Negotiating a Team Charter can resolve team dysfunction by confirming objectives, structuring goals, aligning roles, and committing resources. Once everyone has had a fair say in the negotiation process, they can be asked to commit to the Team Charter and manage it appropriately.

Collaborative Development:	<ul style="list-style-type: none"> • The Team Charter is developed through a collaborative process involving the team leader, team members, stakeholders, and the sponsor. • Input from all parties is considered during the negotiation phase to ensure alignment with the overall mission and objectives.
Discussion and Alignment:	<ul style="list-style-type: none"> • The team engages in open dialogue to discuss and refine each section of the Team Charter, ensuring clarity and consensus on roles, objectives, resources, and boundaries. • Any disagreements or conflicting perspectives are addressed constructively, focusing on finding mutually acceptable solutions that support the team's mission.
Approval and Commitment:	<ul style="list-style-type: none"> • Once the Team Charter is finalised, all team members and stakeholders sign off on the document as a symbolic gesture of their full commitment to the outlined mission, objectives, and principles. • By signing the Charter, team members acknowledge their roles and responsibilities and commit to upholding the agreed-upon standards and values. • This process fosters accountability, trust, and cohesion within the team, promoting a shared understanding of the project's importance and the collective effort required to succeed.
Ongoing Review and Adaptation:	<ul style="list-style-type: none"> • The Team Charter remains a living document, subject to periodic review and adaptation as circumstances evolve or new insights emerge. • Regular checkpoints are established to assess progress, address deviations from the Charter, and make necessary adjustments to keep the team aligned with its mission and objectives.
Celebration of Agreement:	<ul style="list-style-type: none"> • Upon finalising the Team Charter, the team celebrates the agreement and reiterates their commitment to working together to achieve the shared goals. • This celebratory moment fosters a sense of camaraderie and unity among team members, strengthening their resolve to overcome challenges and deliver exceptional results.

