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5 Benefits of Using A Team Charter On Your Next Engineering Project

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"Coming together is a beginning. Keeping together is progress.

Working together is success." ~ Henry Ford

Closing out a project management hit this month, this article will focus on 'the team charter'. More specifically, why you might consider at least building one even if you don't create a project plan or any other project management actions.

The benefits a team charter will give you on your next engineering project can be summed up in two words: coordinated effort.

When you operate on any project without a clear understanding of the who, what, where, how, when and most importantly...why...you open your organization and yourself to the whims of chance. There isn't a boss or key stakeholder anywhere that wants more risk associated with a project they are sponsoring. So do yourself, your team, and your sponsors a favor and create a team charter on your next engineering project.

5 Benefits of a Team Charter

There are a number of tangible and intangible benefits of having a team charter, but I'll focus on just these big five:

1. Shared Vision. The team charter establishes a shared vision of what project success looks like. Without it, each person on the project team is operating with their own definition, which may be drastically different for each person. Especially if you have a project team with a diverse background of experience and technical/non-technical skill sets. Developing a shared vision ensures everyone's reading from the same sheet of music and aiming towards the same ultimate result.

2. Clear Roles and Responsibilities. I believe that one of the most important actions you can take in any shared effort, where more than one person is involved is to clearly state who has what role and what their responsibilities will be. To not do this is the equivalent to assuming that everyone understands what position they play. It's easy to consider what would happen on a sports team or in symphony orchestra if each player didn't understand their role and what they were responsible for. The same holds for the project teams you participate in or lead.

3. Clear Scope and Milestones. Developing a clear statement of scope and high-level milestones is another key benefit to everyone on the team. While the vision helps to give everyone the high-level target to aim towards, the scope statement and key milestones articulate what the end result will look like and when important components must be completed. Both also give you baselines you can use to track completion, which serves both as a good motivator and end-check on team performance.

4. Improved Communications. The team charter also helps to clear up lines of communication between team members and outside stakeholders. It does this in part through the roles and responsibilities matrix, and it also does so by clearly articulating who speaks to whom when and how. In any project there will be $n(n-1)/2$ lines of communications, where 'n' is the number of stakeholders. That means if you're working on a project with 20 stakeholders, you have 190 potential lines of communications between participants! A team charter can help you reduce these lines of communications by streamlining who on the team communicates with whom and how.

While communication is good, sometimes too much communication is redundant.

5. Resource Implications. In my early days as an engineer, I was a resource, my knowledge and skills applied to projects as either a designer or a project manager when needed. While I understood funding and time constraints in general, these weren't my responsibility to manage. The lesson I learned from not concerning myself with the triple constraints of schedule, funding, and scope, is that when your team members don't have a vested interest in controlling them, you are guaranteed a project that is over budget, behind schedule, and over scope. The probability of this occurring drops considerably when the team is fully invested in controlling these constraints.

Building Your Team Charter

Here are seven steps for building a team charter:

Step 1: State the Business Case or Purpose. Every project must be linked to a business case. Why are you undertaking the project in the first case if it isn't to increase the capability or capacity of the organization or to optimize a process? A simple way to state the business case is this:

The purpose of the project is....so that....

Then for your team, complete this statement:

The purpose of this team is...so that...

The two statements must be linked.

Step 2: Project Scope and Parameters. Clearly state what the scope of the project is and outline the parameters within which you will have to implement the project. The following list is useful for building the project scope statement:

- Product scope description: The characteristics of the products, services, and/or results your project will produce.
- Acceptance criteria: The conditions that must be met before project deliverables are accepted.
- Deliverables: The products, services, and/or results your project will produce.
- Project Exclusions: Statements about what the project will not accomplish or produce.
- Constraints: Restrictions that limit what you can achieve, how and when you can achieve it, and how much achieving it can cost.

Assumptions: Statements about how you will address uncertain information as you conceive, plan, and perform your project.

Step 3: Triple Constraints. Every project operates within the triple constraints of schedule (time), resources (cost), and scope (quality). Your team charter needs to clearly articulate what these constraints are, as well as identify what flexibility exists with regards to each. A simple tool to use for assessing flexibility is the flexibility matrix (<http://terrencemetz.com/2013/04/18/how-to-build-a-flexibility-matrix-to-guide-consistent-group-decision-making/>).

Flexibility	Least	Moderate	High
Schedule (Time)	X		
Resources (Cost)		X	
Scope (Quality)			X

*Adapted from Terrence Metz, www.terrencemetz.com

Step 4: Success Criteria. What constitutes success for the project? Articulate the answer to this question in SMART terms, that is: Specific, Measurable, Achievable, Relevant and Timebound.

Step 5: Opportunity Assessment. To determine what opportunities exist for your team, spend time with the members answering the following questions. These are typically questions that are running through your mind as well as your project team members' minds, so you might as well address them up front so everyone is clear. In answering these questions, opportunities will reveal themselves further:

- Why are we here?

- Where are we going?
- What is our current situation?
- What is the worst possible outcome?
- What is the best possible outcome?
- What ideal situations do we want to create?
- What are three things we wish to achieve as a team?

Step 6: Project Plan Activities (High-Level). In my last post, I provided a lot of detail about project plans. One of the most important elements of the project plan is development of roles and responsibilities for the team members (and other stakeholders if/when possible, both internal and external to your organization). A good way to illustrate this is by using a matrix as shown here:

	Role	Responsibility	Authority
Team Leader <i>Leader</i>			
Team Member <i>Member #1</i>			
Team Member <i>Member #2</i>			
Team Member <i>Member #2</i>			
Team Member <i>Member #2</i>			
Functional Manager <i>Manager</i>			

Image by Christian Knutson, P.E., PMP

Step 7: Team Selection. If you're in the role of selecting your project team members, then invest some time clarifying what skills and personalities you need on the team. Consider interviewing prospective team members from a perspective of the effectiveness they will have in bringing project success to reality. Ask open-ended questions like:

- Why do you want to be a part of this project team?
- What is your strongest skill?
- What do you feel you can contribute most to any team?

And consider having prospective team members complete a personality profile test to ensure you have a well-balanced team. One tool I use often is disc personality test (<http://discpersonalitytesting.com/free-disc-test/>), a free online personality profile assessment that helps me to gauge where team members will fit.

If you're in a situation where you cannot choose your project team members, then I recommend you do the following:

Clearly state expectations of the person and let them know what they can expect from you.

Let them know what their role will be, the responsibilities they will have, and what they are accountable for.

Have them complete the disc personality profile assessment so you can gain some idea of how your team will fit together.

Developing a team charter serves as the team's plan for how you will deliver excellence together. Having developed these for both engineering and non-engineering projects in the past, I can attest to the team charter's effectiveness in clearing up confusion on the project's scope, roles/responsibilities, and expectations.

Whenever you have a chance to reduce risk and the number of assumptions in a project, take it. When you build a team charter, you will be doing both.

Have you used a team charter on an engineering or non-engineering project in the past? Share your experiences (good and bad) with other readers below in the comments.

Reference:

Portny, Stanley. "What to Include in a Project Scope Statement." Project Management For Dummies, 4th Edition. For Dummies, n.d. Web. 13 June 2015.

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