Well Begun is Half Done

Developing the Team Charter

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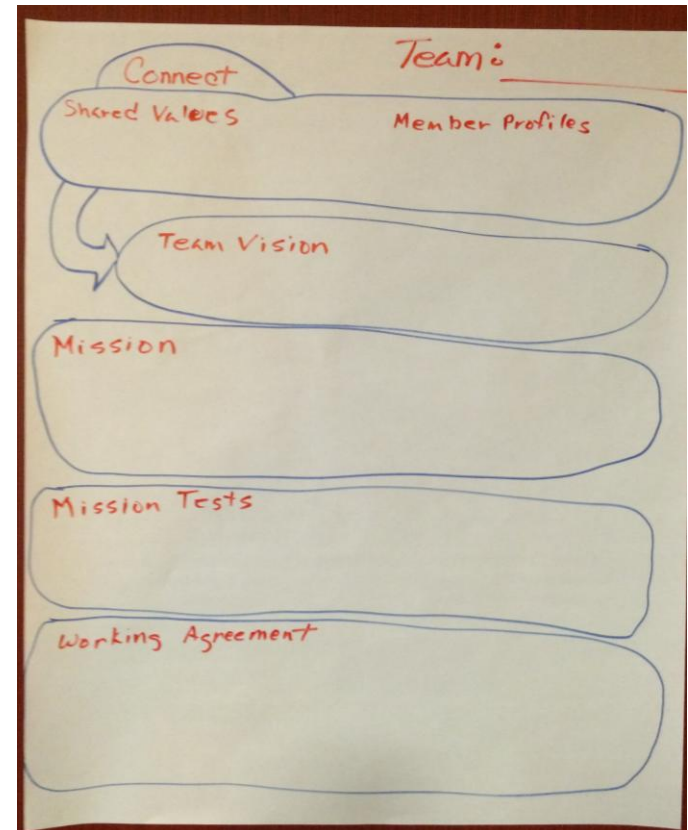*linda@projectcooks.com*

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Workshop Simulation

- Highly abbreviated activities

- Plan on longer & multiple sessions

Organize a Team

Member Profiles
Exercise I

Your personal member profile,

The Shush Guy

Shared Values
Exercise II

Your personal values

**2 Core Personal Values
Affinitize: Sort, Prioritize,
Combine, Categorize
Dot Vote**

Choose A Team to Simulate

- Choose one of two Team Profiles or
- Make up your own team profile

Why Create a Team Charter?

Alignment
Purpose
Method
Values

Workshop Outline

Discover Alignment
- Values
- Members

Practice
- Charter Construction
- Team Vision
- Mission
- Working Agreement

Share

Types of Charters

Project/Program
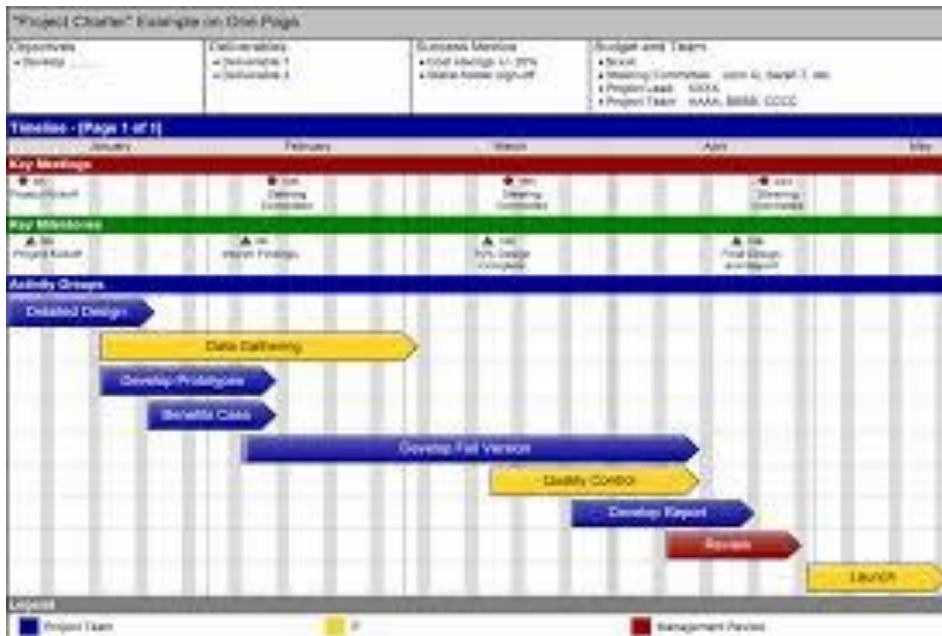
Team/Group

Anatomy of a Team Charter

Charter Template

Values and principles
Team member profiles
Vision
Mission
Working Agreements

Players values
- Unity and team work
- Intensity and toughness
- Competitiveness and discipline

**Out of Scope
For Workshop**

**Boundaries
Committed resources
Community Interactions**

...on
...igh school
...ons
...e an
...ffort and a
...unity
... will represent
...radition

Why are you here?
- To enjoy the game we love!
- To pursue winning
- To challenge ourselves
- To be extraordinary athletes

Rule...
- Rep...
- Be a...
- Provi...

**Bring
back the
spark**

Charter Development, When?

Team Vision
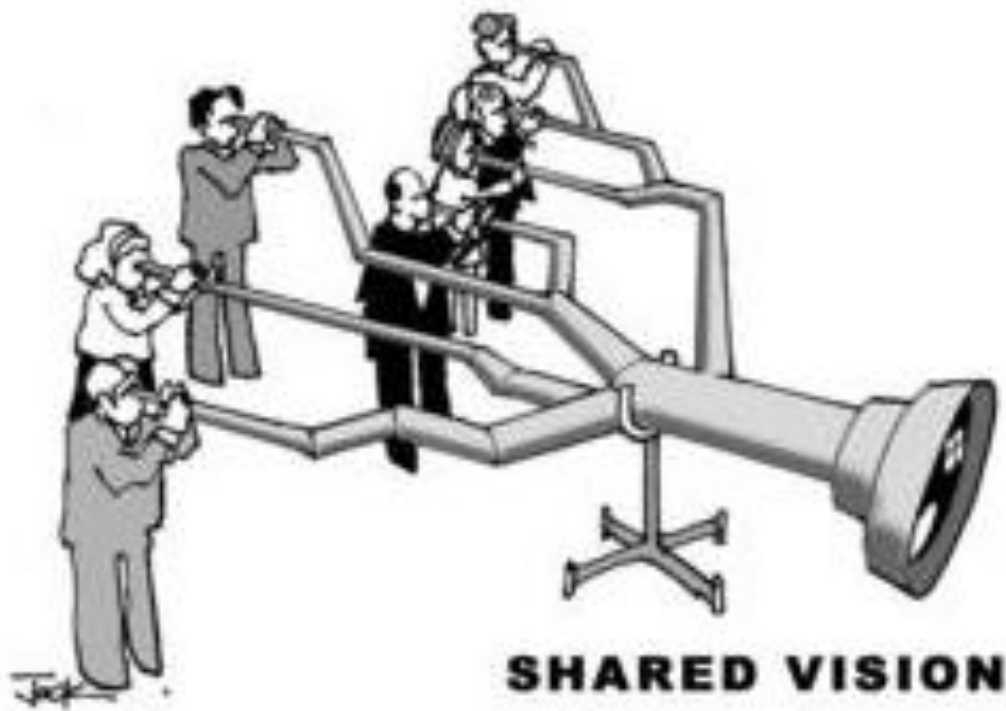
SHARED VISION

Team Vision
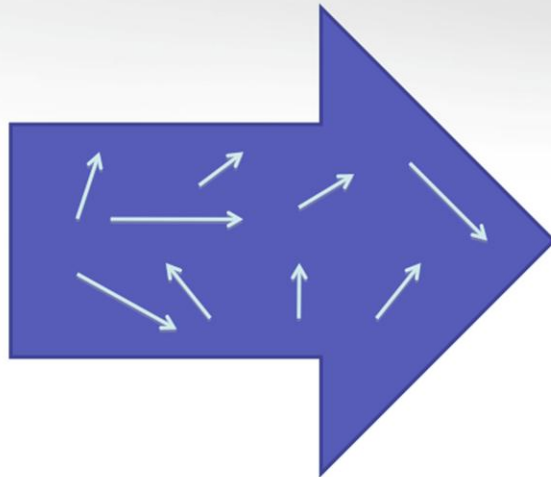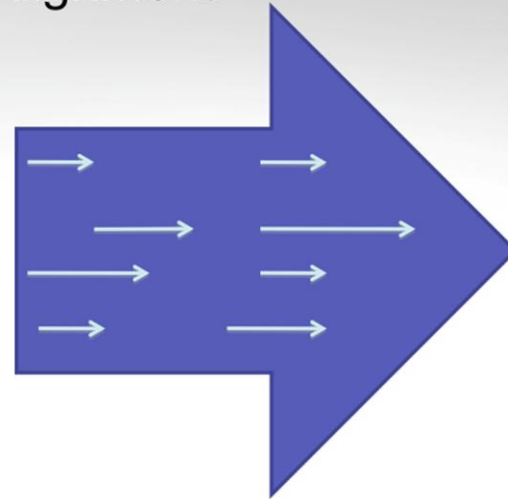
Company Vision Examples

Company Vision:

Disney – To make people happy.

Oxfam – A just world without poverty.

Ikea – To create a better every day life for the many people.

DuPont is a science company. We work collaboratively to find sustainable, innovative, market-driven solutions to solve some of the world's biggest challenges, making lives better, safer, and healthier for people everywhere.

Allstate - We are the Good Hands: We help customers realize their hopes and dreams by providing the best products and services to protect them from life's uncertainties and prepare them for the future.

Company Vision Examples (2)

Fulfilling dreams of personal freedom is more than a phrase. It's our purpose and our passion. We bring a commitment of exceptional customer experiences to everything we do – from the innovation of our products to the precision of our manufacturing – culminating with our strong supplier and dealer networks. We are **Harley-Davidson**.

Hilton - Our vision is to fill the earth with the light and warmth of hospitality, by being the first choice of hotel guests, team members, and owners alike.

Team Vision Examples

- Transform the way we work to effectively deliver solutions in order to provide customers with a simple, and innovative way to protect what matters most.

- Team **Kurtulmak** partners with IT security to provide an enterprise solution for identity management. We design and implement standardized access controls, consistent processes, and centralized security of accounts, so that all new employees have a streamlined and simplified process for on boarding.

- To serve our organization, our customers, shareholders and employees by: producing timely, clear, and accurate data communicating organization products and services maintaining regulatory compliance protecting organization cash flow.

Develop a Team Vision
Exercise III

Answer the questions:
- What is the company vision? How does our team make a difference toward that end?
- What will we be known for?
- What feels impossible?
- What do our customers most need from us?
- Add more specific to your team

Imagine 5 year from now:
- What is the most important work we are doing?
- What are our customers saying about us?
- What does it feel like to work on this team?
- What is senior management saying about us?
- Add more specific to your team

Develop a Team Vision
Exercise III

Auto DUR

<u>Vision</u>: Seamless fully automated and accurate prescription management making our client confident in serving their customers

Bazinga

<u>Vision</u>: Quick and simple online transaction processing that is a pleasure to use.

Team Mission
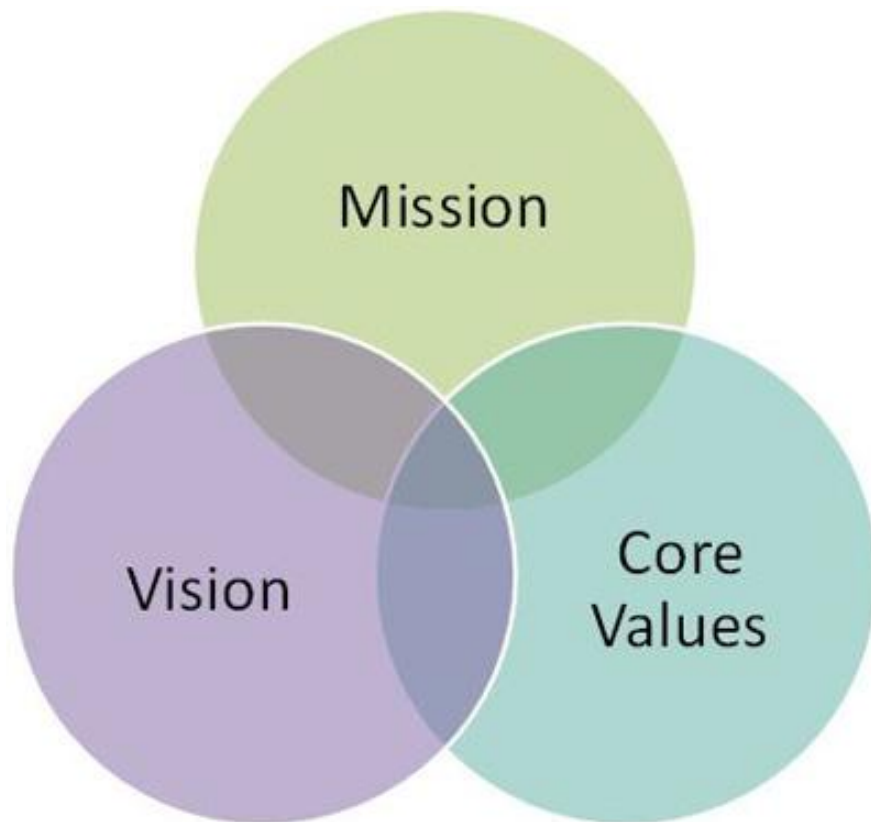
- Description of the Team's customer
- Product or Service being delivered by the Team
- The Team's Role in delivering product
- The Team's Differentiating & Compelling value to organization

Test the Mission

Vision & Mission
What's the difference?

	Mission Statement	Vision Statement
About	HOW the team will get to where it wants to be. Defines the purpose and primary objectives related to the customer needs and team values	Outlines WHERE the team wants to be. Communicates both the purpose and values of the team.
Answer	It answers the question, "What do we do? What makes us different?"	It answers the question, "Where do we aim to be?"
Time	Present leading to its future.	Talks about the future.
Change	Your mission statement may change, but it should still tie back to core values, customer needs and vision.	Vision statements explain the team's foundation, so change should be kept to a minimum.

Adapted from diffen.com Mission Statement vs Vision Statement

Develop a Team Mission Exercise IV

* Mission
  1. Brainstorm & Quickly write mission items and put them on the wall
  2. Talk about them and consolidate items
  3. Dot vote select 1 (2 dots)

Develop a Team Mission Exercise IV

* How will this product affect the overall business?
* What impacts can you imagine, both positive and negative?
* Which parts of our market will the our product or service affect, and how?

Mission Examples

Vision: Transform the way we work to effectively deliver solutions in order to provide customers with a simple, and innovative way to protect what matters most.

Mission 1: Foster a digital first culture at <company name> by changing the way we fundamentally work by: Being Autonomous; Utilizing Quick cycles; Test and Learn

Mission 2: To be totally focused on meeting the needs of our customers in order to improve online throughput and close the gap with our BIC (best in class) competitors

Develop a Team Mission Exercise IV (More)

Vision: Team Kurtulmak partners with IT security to provide an enterprise solution for identity management. We design and implement standardized access controls, consistent processes, and centralized security of accounts, so that all new employees have a streamlined and simplified process for on boarding.

Mission 1: We enable automated account provisioning by integrating with critical organizational systems. We are champions for the identity management tools we support. We provide a centralized and flexible reporting and certification process.

Vision: To serve our organization, our customers, shareholders and employees by: producing timely, clear, and accurate data communicating organization products and services maintaining regulatory compliance protecting organization cash flow.

Mission 1: We leverage technology, employee development, and work processes to produce accurate, timely, and reliable customer data. We ensure information is delivered properly to the organization, our customers, shareholders, and employees through appropriate communication channels.

Develop Team Mission with Tests Exercise V

* Mission Tests (for selected mission)
    1. Brainstorm & Quickly write mission tests
        * Goals, evidence, metrics that point support the success of the mission
    2. Talk about them and consolidate items
    3. Team agreement on including each mission test (roman vote)

Develop Team Mission with Tests Exercise V (Example Team 1)

Team Vision:

Transform the way we work to effectively deliver solutions in order to provide customers with a simple, and innovative way to protect what matters most.

Team Mission

* **Mission 1:** Foster a digital first culture at <company name> by changing the way we fundamentally work by:

  * Being Autonomous

    ➢ Test: track number of times, the amount of time and why we need to engage outside the team

  * Utilizing Quick cycles

    ➢ Test: track story cycle times

  * Test and Learn

    ➢ Test: track learnings and changes on team repository

* **Mission 2:** To be totally focused on meeting the needs of our customers in order to improve online throughput and close the gap with our BIC (best in class) competitors

    ➢ Test: Measure of E2E throughput gap compared with top 3 competitor's throughput

Develop Team Mission with Tests Exercise V (Example Team 2)

Team Vision:

Team Kurtulmak partners with IT security to provide an enterprise solution for identity management. We design and implement standardized access controls, consistent processes, and centralized security of accounts, so that all new employees have a streamlined and simplified process for on boarding.

Team Mission

* **Mission 1:** We enable automated account provisioning by integrating with critical organizational systems. We are champions for the identity management tools we support. We provide a centralized and flexible reporting and certification process.
  * ➤ Test: Self-service identity management access expanded to 25% more employees and contractors by the end of 2011

Develop Team Mission with Tests Exercise V (Example Team 3)

Team Vision:

To serve our organization, our customers, shareholders and employees by: producing timely, clear, and accurate data communicating organization products and services maintaining regulatory compliance protecting organization cash flow.

Team Mission

* **Mission 1:** We leverage technology, employee development, and work processes to produce accurate, timely, and reliable customer data. We ensure information is delivered properly to the organization, our customers, shareholders, and employees through appropriate communication channels.

  ➢ Test: Achieve 100% accuracy related to accounts payable and billing processes and procedures by Q3 2011.

  ➢ Average fewer than two at-fault complaints a month about accounts payable or billing errors, over the next year. Our organization sponsors and product owners report 90% satisfaction with our communication.

Working Agreement

* Expected behaviors
* Team commitments
* Boundaries and constraints
* Interactions

Develop Working Agreement Exercise VI

* Use the template provided
* Include
  * Logistics
  * Boundaries
  * Interactions
* Consider:
  * working hours, locations, meeting times, communications methods

Develop Working Agreement Exercise VI (Example)

Team Vision:

Team Kurtulmak partners with …..

Team Mission

* **Mission 1:** We enable automated account ….
  * ➤ Test: Self-service identity management …

Working Agreement

* We define "Done" for our stories as: code complete, unit tested, code deployed to stage, and functional testing complete.
* Core hours for our team are 9 am to 4 pm, and all team members are available for meetings and communication during these hours. Exceptions are allowed when the entire team agrees.
* We hold daily standup meetings from 9: 00-9: 15 am.
* We cast no silent vetoes; we speak up if we
* We acknowledge and accept if we are an impediment for the team.
* Product owner, business analyst, scrummaster, and development team members all advocate for the team.

Each Team Share your Charter

* Decide on a speaker
* Be brief (1 minute)
* Share the outline of your charter and any specifics that are relevant with one other team

When will you do your charter

* Make a commitment
* Give contact info
* Drop Box Shared Folder
  * http://tinyurl.com/TeamCharterWorkshop
  * Share your Charters
    * http://tinyurl.com/DropCharter

References
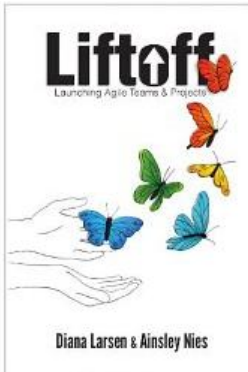
Diana Larsen,
Ainsley Nies
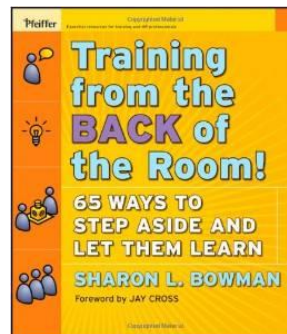
Sharon Bowman

- Seapoint Center for Collaborative Leadership, Jesse Lyn Stoner-blog (Vision & Goals)
- Let's Grow Leaders, Karen Hurt (How to Build A Strong Team Vision)

THE END

Workshop Format

70-90 minute format

C1- Connections

Content	Tools/activities	
Member Profiles	• Graphical Organizer • Profile Template (5 min)	**5**
Team member shared values	• Quick Write (3 min) • Affinitize (3 min) • Dot Vote (3min)	**14**

Time: 14 min

C2- Concepts

Content	Tools/activities	
WS outline, Team Charter, Components	• Interactive Lecture (6 min)	**20**
Team Vision	• Interactive Lecture (5 min) • Move to C3-Vision	**25**
Mission w/ Tests	• Interactive Lecture (10 min) • Move to C3-Mission	**40**
Working Agreement (WA) [Optional]	• Interactive Lecture (5 min) • Move to C3-Working Agreement	**55**

Time: 26 min

C3- Concrete Practice

Content	Tools/activities	
Team Vision	• Group Collaborate (5 min) • Return to C2-Mission	**30**
Mission W/ Tests	• Brain storm/quick write (4 min) • Dot vote/select 1 (2 min) • Brainstorm & Select test (4 min) • Return C2-WA	**50**
Working Agreement (WA) [Optional]	• Collaborate, Worksheet (5 min)	**60**

Time: 20 min

C4- Conclusion

Content	Tools/activities	
Share Team Charters	• Teach Back to (subgroups next table team) (5 min)	**65**
Closing	• Have 1-2 teams share charters w/ entire group • Interactive Lecture (5 min)	**70**

Time: 10 min

Presentation Only (WIP)

45 minute format

C1- Connections

Content	Tools/activities	
Member Profiles	• Explanation Only, Examples (3 min)	**3**
Team member shared values	• Explanation Only, Examples (3 min)	**3**

Time: 6 min

C2- Concepts

Content	Tools/activities	
WS outline, Team Charter, Components	• Interactive Lecture (6 min)	**12**
Team Vision	• Interactive Lecture (5 min) • Move to C3-Vision	**17**
Mission w/ Tests	• Interactive Lecture (10 min) • Move to C3-Mission	**27**
Working Agreement (WA) [Optional]	• Interactive Lecture (5 min) • Move to C3-Working Agreement	**32**

Time: 26 min

C3- Concrete Practice

Content	Tools/activities	
Team Vision	• ~~Group Collaborate (5 min)~~ • ~~Return to C2 Mission~~ • Team vision Examples	**3**
Mission W/ Tests	• ~~Brain storm/quick write (4 min)~~ • ~~Dot vote/select 1 (2 min)~~ • ~~Brainstorm & Select test (4 min)~~ • ~~Return C2 WA~~ • Team Mission w/ Test Examples	**3**
Working Agreement (WA) [Optional]	• ~~Collaborate, Worksheet (5 min)~~ • Team Working Agreement Examples (2)	**2**

Time: 8 min

C4- Conclusion

Content	Tools/activities	
~~Share Team Charters~~	• ~~Teach Back to (subgroups next table team) (5 min)~~	**0**
Closing	• ~~Have 1-2 teams share charters w/ entire group~~ • Interactive Lecture (5 min)	**5**

Time: 5 min

Team Format (TBD-WIP)

C1- Connections

Content	Tools/activities	
Member Profiles	• Graphical Organizer • Profile Template (30 min)	30
Team member shared values	• Quick Write (20 min) • Affinitize (10 min) • Dot Vote & consolidate (5 min)	65

Time: 1.25 Hrs

C3- Concrete Practice

Content	Tools/activities	
Team Vision	• Group Collaborate (40 min) • Return to C2-Mission	118
Mission W/ Tests	• Brain storm/quick write (40 min) • Dot vote/select 1 (10 min) • Brainstorm & Select test (10 min) • Return C2-WA	191
Working Agreement (WA) [Optional]	• Collaborate, Worksheet (30 min)	228

Time: 2 hr 10 min

C2- Concepts

Content	Tools/activities	
Charter, Components	• Interactive Lecture (6 min)	71
Team Vision	• Interactive Lecture (5 min) • Team vision Examples (2 min) • Move to C3-Vision	78
Mission w/ Tests	• Interactive Lecture (10 min) Team Mission w/ Test Examples (3 min) • Move to C3-Mission	131
Working Agreement (WA) [Optional]	• Interactive Lecture (5 min) • Team Working Agreement Examples (2) • Move to C3-Working Agreement	198

Time: 26 min

C4- Conclusion

Content	Tools/activities	
Share Team Charters	• Teach Back to (subgroups next table team) (5 min)	0
Closing	• Have 1-2 teams share charters w/ entire group • Interactive Lecture (5 min)	0

Time: 0 min

Support Material

Supply	Count
Presentation laptop w/ presentation & clicker	1
Team Member Profile Forms	1 per # attendees
Sharpies	1 per # attendees
Team Profiles (2)	1 set per # team
Working Agreement form	1 set per # team
Team Charter Outline (Template outline image) or drawn on flipchart	1 set per # team
Stickies (1 large & 2 small)	1 set per # team
Flip chart page	1 per # teams
Blue Tape	2 rolls
Fruit cards & stands (Optional)	1 per # team

Guidance

* Estimate # attendees
* Estimate total # teams = # attendees/6

Room Setup

1. Setup audio/video & test
2. Arrange tables for teams of 5-7 (if possible)
3. Place Sharpies in cups (6)
4. Organize handouts
   1. Team Profiles
   2. Member profiles
   3. Template Image
   4. Working agreement forms
5. Draw example flipchart template
6. Draw all flipchart templates (optional, if possible)

Team Profile – Auto DUR

Large Pharmaceutical Management

Company Overview: Leading global provider of prescription drugs and prescription insurance management. Manager of mail order and brick and mortar pharmacies.

Team Highlight

- **Geographically distributed team in India & East Coast**
- **Cross functional team including QA, BA, and Development team members**
- **Product is a back end service for pharmacy insurance management**

Team Role

- ❑ Improve efficiency and reduce manual edits of the drug utilization review process (DUR) by automating alert resolutions managed by pharmacists.
- ❑ Legacy patient prescription management system written in Cobol and running on main frame platform. System difficult & expensive to rewrite on newer platform and technology.
- ❑ Limited SME and developer availability.
- ❑ Development releases must conform to regular monthly QA cycle in place for legacy system updates.
- ❑ Complexity of work – multi-product, multi-site, off-shore, quick ramp-up, lack of documentation, etc

Structure

- ❑ Developers – 4 total,
    - 1 lead technical local,
    - 1 Jr level local,
    - 2 mid level in Chennei
- ❑ QA – 2 in Chennei
- ❑ PO – 1 local
- ❑ Business Analyst (BA) – 1 in Chennei
- ❑ Scrum Master (SM) – 1 local
- ❑ Operates in 3 week sprints with releases monthly
- ❑ Release candidates provided to System Integrations QA (Separate from team QA) 15 days prior to target release

Historical

- ❑ Team operating for 6 sprints
- ❑ Average velocity of 45 over last 3 sprints.
- ❑ Say/Do ratio average of 85%
- ❑ Defect introduction of approximately 1 per release

Team Profile – Bazinga

Leading Online Financial Services

Company Overview: Leading global provider of online payments and credit.

Team Highlight

- **Co-located on US East Coast**
- **Cross functional team including QA and Development team members**
- **Credit Products offered in the US & the UK.**

Team Role

- ❑ Improved test coverage at least 50% on all packages
- ❑ Consistently completed all open backlog items
- ❑ Established a VM desktop for all developers in the Credit domain
- ❑ Actively mentored summer interns and various junior developers
- ❑ Automated all key project testing within one year
- ❑ Improved vendor relations through automating the integrated test process

Structure

- ❑ Developers – 5 Java devs, 1 Database Dev
- ❑ QA – 2 Local
- ❑ PO – 1 Local
- ❑ Scrum Master (SM) – 1 local
- ❑ Operates in 2 week sprints with releases monthly

Historical

- ❑ Significant increase in velocity from 9 points to an average of 38 points
- ❑ Say/Do ration consistently exceeded 100%
- ❑ Reduced cyclomatic complexity
- ❑ Recognized as a high performing team
- ❑ Lots of fun!