TEAM CHARTER WORKSHOP

Our team charter

HIGH PERFORMING TEAMS

Fill in one box as you finish each step of the workshop. Keep every line specific enough that a new joiner would know exactly what to do. One page is plenty.

Team:

Agreed on:

01 Our purpose

This team exists to...

02 Our goals

No more than three, and how we will know we got there

03 Our roles

Who owns what, and who decides what

04 How we work

Meetings, communication, information, and how we use AI tools

05 How we behave

Five to eight agreements we could see someone keeping

06 Our review

When we will check it still works, and who brings it back

WORKED EXAMPLE

An example charter

HIGH PERFORMING TEAMS

An example from an eight-person customer service team at an online retailer, written in a 60-minute workshop. Use it to see how specific each line can be, not as a script.

Team: Customer service, eight people

Agreed on: the first Monday in March

01 Our purpose

This team exists to sort out customers' problems quickly and kindly, so they choose to buy from us again.

02 Our goals

1. Answer every email within four working hours (now 11 hours)
2. Lift customer satisfaction from 82% to 90%
3. Halve repeat contacts about the same order

03 Our roles

- Team leader: rotas, escalations, and hiring
- Help centre articles: one named owner
- Refunds over £200: one named owner
- Anyone can refund up to £200 without asking
- Changes to how we work are agreed together on Mondays

04 How we work

- 15-minute stand-up at 9am, Monday to Friday
- Urgent issues go in the team channel; everything else by email
- Handover notes in the shared log before each shift ends
- AI can draft replies, but a person reads every reply before it is sent
- No payment details ever go into AI tools

05 How we behave

- We let people finish before we reply
- We raise a problem on the day we spot it
- We ask for help after 15 minutes stuck
- We disagree in the room, not afterwards
- We cover each other's breaks without being asked

06 Our review

We revisit this charter on the first Monday of every quarter, and whenever someone joins or leaves. The team leader brings it back.

Free to use and share with your team