

Team's Transformation Process Project Charter Template

What's this project about?

I.e. The cars division wants to rely on team that's able to deliver any kind of work any time on time and within the forecasted budget.

Why are we doing it right now?

Reason	Strategy
E.g. Focus on what brings value to the division to increase the Return of Investment per project	E.g. Optimize where the company put its efforts by distributing properly the content to be integrated.
E.g. Increase operational efficiency	E.g. Improve project planning and prioritization at the Product team level
	E.g. Increase collaboration with directors and different stakeholders
	E.g. Build a high performing sustainable development team

Vision of the team 1 year from now

- E.g. a fully collaborative and cross functional team is in place.
- E.g. every member of the development team can work on any project at any time.
- E.g. knowledge is shared within the team and that's done via development process.
- E.g. a high-performing sustainable development team is in place.

Main goals for the next three (3) months

- E.g. Team's Development process is implemented end to end
- E.g. Development team backlog is healthy (Properly prioritized based what the business wants and what brings more value)

Roles and responsibilities

Role	Responsibilities
Main Stakeholder (Full name)	<p>E.g. sets high level vision for the content to be developed.</p> <p>E.g. negotiates priorities with Customers.</p> <p>E.g. helps Product Owners make the vision and corporate goals tangible in the development team backlog</p>
Product/Service Owner (Full name)	<p>E.g. manages development team Backlog</p> <p>E.g. decides what to do and when (Establishes backlog priorities)</p> <p>E.g. negotiates priorities with main Stakeholder</p> <p>E.g. leads development team to deliver the content of its backlog</p> <p>E.g. collaborates with the Agile Coach/Scrum Master to create a high-performing sustainable team.</p> <p>E.g. collaborates with the delivery team with refining the development team's backlog</p>
Agile Coach/Scrum Master (Full name)	<p>E.g. Sheppard's team's development process</p> <p>E.g. coaches the team to become a self-organizing and high-performing sustainable team</p> <p>E.g. coaches Product Owners with managing the team's backlog and with leading the team.</p> <p>E.g. facilitates all team ceremonies</p> <p>E.g. facilitates interactions between team members</p> <p>E.g. removes impediments from the way of the team</p>
Development team (Name of the team or description)	<p>E.g. does the job to (description of what the team does) ...</p> <p>E.g. delivers high-quality ____ for <division/unit/client></p> <p>E.g. collaborates with Product Owners and the Agile Coach/Scrum Master to increase team's performance</p> <p>E.g. raises impediments and make them visible to the team.</p>
Line team manager(s) Full Name	<p>E.g. brings support to the team and the development process</p> <p>E.g. collaborates with the Agile Coach/Scrum Master with removing impediments</p>

Stakeholders (List of all stakeholders)	E.g. collaborates with the team and the Product team with grooming the content of the development team backlog
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High level Risks

Risk Category	Description
Human Resources	E.g. peoples resistance to change
Communication	E.g. limited support from Stakeholders and PO's.
Communication	E.g. unclear goals, and unshared vision
Communication	E.g. unclear roles and responsibilities
Resources	E.g. project loses interest and stakeholder stop funding it

Figure 1-Team's Transforming Process Project Charter -High level risks

Process high level guidelines

I.e. This team has been using Kanban as their way to deal with requirements. There are no special events, no time boxed iterations are set and no feedback loop in place.

Planning the team's transformation process

Before meeting the team, there is a change to be managed, planned and communicated, and that's the change that you are about to begin when transforming the team into a high-performing sustainable team. A change that requires a lot of effort in time and money which, in my opinion, needs to be supported with a transition plan. But why do we need a plan to transform a team, isn't it something that's going to happen in an agile fashion, I mean iteration by iteration? Why should we care about planning changes, when playing the Scrum Master or Agile Coach role? Well in my opinion it depends, but I prefer a clear understanding about what's motivating the stakeholders to invest resources in what I've called "the team's transformation project".

At this stage of the project, there is not a lot of information about:

- The reasons behind hiring or even assigning a Scrum Master or Agile Coach to the team.
- Who does what, when and how things are going to happen (what's the plan?)
- The team and its composition.
- How the team works.

What's the main goal here?

"Mitigate change resistance by reducing ambiguity, increasing visibility and creating awareness about the project at every level involved"; to gain the people's trust and create the required conditions to successfully reach the people's heart.

How to do it? How to get everybody involved in the project and on the same page?

First, I gather enough information to create the "project charter", by talking with all the parties involved in the "team's transformation project". Here are the steps that I follow to complete this stage of the process:

Preliminary work (It's all about the team and the environment)

Purpose: Get ready to talk with project's main stakeholder.

Tactic: Collect information about the team by meeting with their line manager(s) and asking questions like:

- Is the team being formed for this specific project?
- How long the team has been working together?
- What about team's development process?
- Who are the main stakeholders of the project?
- Who are the customers?
- How does the team work?



Tip: Try to understand how the team works first and then think with them, what to do next.

Project Charter content gathering meeting

Purpose: Collect enough information to get everybody on the same page and begin the project as soon as possible.

Tactic: meet with project main stakeholder(s) to answer a list of crucial questions for the project:

- What's the project about?
- Why are we doing this right now?
- Reason and strategy
- Who is doing what? Help with identifying roles and responsibilities.
- What are the biggest business and operational risks, associated to the project?
- What's your vision of the team a year from now?
- What are the top three main goals, for the short term (3 months ideally)
- Is there any suggestion on how the process of the team's work should be conducted?

Outcome: The team's transformation process Project Charter information has been gathered.

Fill the Team's Transformation Process Project Charter template

Purpose: Document the shared understanding baseline of the project.

Tactic: Focus on documenting just enough information to describe what the project is about.

Outcome: Team's transformation Project Charter is completed and ready to be shared.



Tip: Keep it simple and document no more than two (2) pages.

High level project plan approval meeting

Purpose: Get common agreement about what the project is about and get the project plan approved. Begin working with the team.

Tactic: Focus on documenting just enough information to describe what the project is about.

Outcome: Team's Transformation Process Project Charter has been approved.

Team's transformation project kick-off meeting

Purpose: Shared understanding for team project members about the team's transformation project.

Tactics: Hold a one-hour meeting and be sure that all interested parties are present.

Ask the main project stakeholder to set the stage by sharing with the audience the two first components of the team's transformation project charter:

1. What's the project about?
2. Why are we doing it right now?
3. Reasons and the strategies to get it done.

Now, it is your turn to go through the remaining content of the team's transformation process project charter:

1. Roles and responsibilities
2. Vision of the team in one (1) year from now.
3. Short term main goals identified.
4. High level project risks.
5. Identify the next step in the plan



Tip: Print out a copy of Team's transformation process project charter for every person present in the meeting.