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Team charter and kick-off checklist

Settle what the sponsor must answer, then agree on one page how the team will work.

First: team or group?

Question	Yes	No
Is there a goal none of us can achieve alone?		
If one of us misses, do the others fail too?		
Would we lose something real if we only met to share updates?		

Mostly no: run it well as a working group – one-to-one accountability, goals that serve the organisation, the few hand-offs agreed, short meetings on shared business only. Mostly yes: work through the checklist and write a charter.

Kick-off checklist (sponsor and leader, before the first meeting)

Heading	Question	Answer / owner
Why, and how far	What problem is this team here to solve, and why does it matter now?	
Why, and how far	What is inside the remit and what is outside it? Has the sponsor signed that off?	
What done looks like	What will be different once the team has finished?	
What done looks like	What will we count, or what evidence will we accept, to show it?	
What done looks like	Which organisational objective does each outcome serve?	
What done looks like	What do we hand over, and on what date?	
What done looks like	What are the checkpoints, and who signs each one off?	
Who, and how much	What does each member bring that we could not do without?	
Who, and how much	What do the leader, the sponsor and any facilitator each actually do?	
Who, and how much	Hours or days each person is giving, agreed with their manager?	
Who, and how much	Which meetings does each person need to attend?	

The checklist is adapted from a team start-up checklist published by MIT Human Resources.

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Our team charter

Purpose

Why we exist
In a sentence or two, and the organisational objective it serves

What we own
The outcomes we answer for, and the tasks that cannot slip

Our goals	Who leads	Done by	Evidence it is done	Next checkpoint

People

Who we are
Members, what each brings, who does what

How we behave
Three to five behaviours you could see or hear, e.g. "we raise disagreement in the meeting, not after it"

How we handle disagreement
Including who calls time on a debate

Process

Our meetings
Which ones, what each is for, who needs to be there, where decisions are recorded

How we decide
And who decides, by when, if we cannot agree

How we stay connected
Who outside the team needs to hear from us, how and how often

How we keep improving
When we stop to review how we work

Review this charter at 30 and 90 days. It is a working agreement, not a monument.

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Does any of this sound familiar?

The organisations we work with rarely come to us asking for a survey. They come with something that is costing them money, time or people. These are the ones we hear most often.

MAKING MONEY

"We hire well on paper and still get it wrong in the role."
Personality, leadership and competency assessment matched to the job, so interviews test what matters and offers go to people who will perform. (FindingPotential)

"Our best people leave and we only find out why afterwards."
Exit intelligence in the leaver's final weeks: what was avoidable, who would come back, and what to change first. (LastOpinion)

"Leaders get feedback once a year and nothing changes."
Forward-looking 360 feedback that lands as development rather than judgement, with the actions built in. (FeedForward)

SAVING MONEY

"Too many new starters are gone inside a year."
New-starter surveys at the points the first-year leak opens, so you act at three months instead of reading about it at exit. (OnBoarder)

"References take weeks and tell us nothing."
Automated referencing with questions that predict, most returned within 48 hours. (ReferenceExpert)

"We run an engagement survey and the results sit in a drawer."
Engagement reporting down to team level in plain English, with the three moves each team's own people chose. (WinningFormula)

SOLVING PROBLEMS

"The board wants evidence on culture, conduct and speaking up."
A confidential always-on channel and a harassment-prevention audit that give you the evidence before a regulator asks for it. (SafeSpace)

"We publish an inclusion statement and cannot show whether it is true."
Inclusion measured at every stage from hire to exit, so you can see where the experience differs and act on it. (ED&I)

"We have the data and cannot turn it into a decision."
Twenty years of UK benchmark data and analysts who turn results into a board paper, not a dashboard. (Workforce intelligence)

Who we are

great{with}talent is a UK workforce-intelligence consultancy, founded in 2003. We help organisations hire better, keep people longer, improve leadership, strengthen inclusion and reduce workplace risk, with a connected set of tools that turn employee data into clear, fast action across the whole employee lifecycle. Independent, GDPR-compliant and Cyber Essentials certified, hosted on Microsoft Azure.

Not on the list? It will not always be. If you are working on something you think we might be able to help with, drop us a note describing what you are trying to do and we will come back to you.

On the list or not, let's talk.

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