

Chartering Your Internal Project Team

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In today's workplace, cross-functional project teams provide solutions to complex, far-reaching challenges. One type of cross-functional team is the internal project team, a team formed to lead a large strategic project and then disband. The checklist below includes the most critical considerations for an internal project team to discuss and resolve early. How many of these considerations has your team addressed?

Do you know who your customer is? While it is always clear who is buying a company's products and services and who is paying the invoices, the water can get muddy when a team is charged with providing leadership on an internal matter. Who is your customer? Don't take the easy route of identifying the entire company or an entire department as your customer; it won't help you later if you need to make recommendations that may not thrill every employee.

Do you know your purpose? Some internal project teams are formed only to provide recommendations on a key decision, and are quickly disbanded. Others continue for years, as is often true for large scale technical implementations. Some committees are expected to provide advice only to executives who make decisions, others may be held accountable for sourcing and managing a large staff, and some are expected to evangelize the project throughout the company, managing and ensuring the success of all of the significant changes associated with the project. What is the scope of your team's purpose?

Do you understand the connection between your team's work and the company's strategic direction? Which mission-critical goals does your team's work support? If you don't all know, you may find yourselves focusing on a less consequential area of the business, or arguing over points due to a lack of awareness of the larger context. Given the responsibilities each of you have beyond the internal project team, it only makes sense to ensure that the time you carve out for the internal project team supports activities that are as critical as your individual day-to-day responsibilities.

Are you laying the groundwork to build the team? Do you know the answers to the following questions? Who are the team members? Where does each team member work? What prompted each team member to join the team? What values do you share? What strengths does each team member bring to the table? What contributions does each of you hope to make? What do you each hope to learn and how do you hope to grow through your involvement on this project? What worries each of you the most on this project? Are you building processes to ensure that the team can address these worries in a healthy and productive way? Are team members aware of the typical stages of team development and how to manage themselves through each stage? Have you discussed this?

Do you know the boundaries around your team's decisions? Unlike directions, which specifically tell a team what to do, boundaries tell a team only what they can't do, and leave it up to the team to determine what they will do. Are there other internal project teams in the organization? Executives who make related decisions? Functional teams who make related decisions? If so, which decisions are theirs to make and which are yours? Are there critical interdependencies between the solutions your team is working on and the work of another team or executive? Avoid overlaps and the morale-killing experience of learning after the fact that you didn't have the authority you thought you had. Seek out this information now.

Do you know how you will make decisions? Do you need a quorum to have a meeting? Is it o.k. for non-attending members to block a decision after it's been made? Is it o.k. to vote on some decisions? Which decisions will be complex and far-reaching enough to require analysis, discussion, dialogue, and consensus? Which decisions can be made by individuals and sub-teams? By the leader alone?

Do you know how you will run meetings that actually work well? Few people know how to make meetings work. Have you learned how? Have you collectively identified the operating principals and ground rules? Who will prepare the agenda? Who will facilitate? Who is the team leader? Who will scribe? How will you handle discussions when they bog down? How will you handle situations in which team members feel a decision is being rushed? How will you provide a forum for team members to share thoughts and feelings that can't be boiled down to a bullet point on an agenda, such as a vague feeling that the team is heading the wrong direction? How will you manage conflict productively? It's all going to happen, so prepare for it now.

Do you know how you will measure your success and reward yourselves at key milestones? Does the team have a way to measure your impact? Is the team's success part of the performance objectives for each team member, or is it something you're expected to get to when your "real work" is done? How will you know you are successful as a team? How will you celebrate success along the way? Team success is much more than just meeting success. Have you talked about each person's definition of success for the team? Are your definitions aligned or far apart? Do you have a process in place to create a shared definition of success?