

# AGILE for NON-SOFTWARE TEAMS

GIL BROZA

*A Practical Guide for Your Journey*



Supplementary resource for the book *Agile for Non-Software Teams*. More at [AgileForNonSoftwareTeams.com](http://AgileForNonSoftwareTeams.com)

## Chartering

Chapter 4 guided you to *frame the work*, an activity also known as *chartering*. Even if you're not setting out to try a new way of working, chartering an initiative before starting the work aligns the initiative to corporate strategy and themes, increases buy-in and excitement, and simplifies governance. Here are the elements Gil Broza likes to include in a charter, using the more formal terminology you'll likely encounter in other management literature.

**Vision:** *Why* pursue this initiative? How will the customers/org/world be transformed as a result of it?

- One or two sentences. Note: achieving the vision might require work beyond the current mission.

**Mission:** *What* is the initiative about (its main result)? How does it contribute to realizing the vision?

- Typically, one or two sentences. Might start it with "We will ..."

**Customers:** *Who* will benefit from the deliverables the most?

- There may be several customer types: users, buyers, market segment, other departments, etc.

**Success criteria:** What are the top 3-5 business effects we hope this initiative produces?

- Success criteria **are not** requirements, release criteria, deliverables, or work items. They are objectives, or conditions, that justify working on this initiative.
- If possible, make them binary (pass/fail), or provide desired ranges.
- You might cast some of them as SMART goals.

You can think of the next two elements as starting to answer "What mindset should the team embrace?"

**Assumptions/beliefs:** What are we assuming/believing that might affect our success?

**Values and constraints:** What is (or should be) important to us as we work so that we're successful?

What work aspects are we optimizing for? Which constraints (time, quality, cost, etc.) are nonnegotiable?

- Constraints might be self-imposed, rather than externally imposed, but they should not be arbitrary.
- If there are more than 5 constraints and values, short-list them to 5. Consider prioritizing them.

**Sponsors:** Who has the authority to determine the work's constraints, values, and parameters?

**Community:** Who are the team members and the stakeholders? Names and roles, not titles.

- Note: A stable team that stays together over several initiatives will benefit from having their own *team charter*, which includes their mission and vision, generalized success criteria, beliefs, and team values.