

Team Management Toolkit



Purpose

Toolkit to give your initiative the structure and leadership needed through thoughtful consideration of team roles and responsibilities

Who this is for

- Project Leads
- Team Members (use for alignment and orientation, support tool building)

When to use

Budgeting for the initiative

Planning and scoping the initiative

Closing the initiative

[Introduction](#)

[Roles & Workstreams Guide](#)

[Team Charter Template](#)

[Workstream & Workload Tracker](#)

Project Workstream & Workload Tracker

Why is this tool important?

Workstream and workload tracking is important at the outset to anticipate and plan for expected periods of high and low capacity in the initiative timeline. As the initiative progresses, it provides a means to highlight and communicate workload changes, perhaps unanticipated.

With the team, illustrate the expected workload intensity at the outset of the initiative. Periodically update this document to capture/track team members across the Project Timeline and indicate the degree of progress and challenges towards completion of tasks within each workstream.

Template

[Download template](#) ↓

1 Fill out & periodically update the tracker

Below is a filled in example for your reference.

	Status	Week 1	Week 2	Week 3	Week 4
Team member 1					
Workstream 1	In progress				
Workstream 2	In progress				
Workstream 3	In progress				
Team member 2					
Workstream 4	Not started				
Workstream 5	In progress				
Workstream 6	Completed				
Team member 3					
Workstream 7	Not started				
Workstream 8	Not started				
Workstream 9	Not started				

Identify and track when team members' workloads become heavy so that the project manager (and team) can see the ebb and flow of responsibility across the project timeline, manage workflow, protect against burnout, and allocate support as needed.

Legend

No workload

Light workload

Heavy workload

2 Next step

Review the anticipated timeline and workload with each team member, and ask them to flag any potential conflicts with their other responsibilities outside of this project. This helps to anticipate crunch times and adjust your [Project Timeline](#) as needed.