

# TEAM ALIGNMENT CHECKLIST: ROLES, GOALS, AND TOOLS

## Roles

1. Are roles and responsibilities clearly defined for every team member?  

Task: Write down each team member’s role and their primary responsibilities. Share this with the team to confirm understanding.
2. Is there a clear decision-making structure?  

Task: Define who is responsible for key decisions (e.g., product manager for prioritization, engineering lead for technical feasibility). Document this hierarchy.
3. Do all roles align with the project’s needs?  

Task: Review the project scope and confirm you have the right mix of skills on the team. Identify and fill any gaps.

## Goals

4. Are the project goals clear and agreed upon?  

Task: Write down the project’s top 3 goals. Share them in a team meeting and confirm alignment across all members.
5. Do individual goals support team objectives?  

Task: Ask each team member to write their personal goals for the project. Check that they align with the team’s overall objectives.
6. Are the goals measurable and time-bound?  

Task: Add specific metrics and deadlines to each goal. For example, “Increase retention by 10% within 3 months.”

## Tools

7. Are all team members familiar with the tools being used?  

Task: List the tools (e.g., project management software, communication platforms). Provide training or resources for any tools unfamiliar to the team.
8. Do the tools support collaboration and transparency?  

Task: Check that everyone has access to the tools and that updates (e.g., task progress, milestones) are visible to all.
9. Is there a central repository for documentation?  

Task: Ensure all project documents (e.g., roadmaps, requirements, meeting notes) are stored in a shared, organized location.
10. Are there clear communication protocols?  

Task: Define when to use synchronous (e.g., meetings, calls) versus asynchronous communication (e.g., emails, messages). Share these guidelines with the team.

## Alignment Table:

Category	Key Questions	Status(Yes/In Progress/No)	Follow-Up Action
Roles	Are roles clearly defined?		Clarify roles and responsibilities
	Is decision-making structure clear?		Document decision-making processes
	Do roles align with project needs?		Identify and fill skill gaps
Goals	Are project goals clear?		Share and confirm team alignment
	Do individual goals support objectives?		Check and realign personal goals
	Are goals measurable and time-bound?		Add metrics and deadlines
Tools	Are all tools familiar to the team?		Provide training or guides
	Do tools support collaboration?		Ensure access and visibility
	Is documentation centrally stored?		Organize a shared repository
	Are communication protocols clear?		Define and share communication guidelines