


TEAM READINESS KIT: ROLES, ONBOARDING, ACCOUNTABILITY

Build a team you can trust to execute —
without micromanaging.



Ready?

1. ROLE CLARITY TEMPLATE

Use this worksheet to define clear roles and what success looks like for those roles.

Role Title:

Main Purpose:

Key Responsibilities (3-5):

1. _____
2. _____
3. _____
4. _____
5. _____

Success Looks Like:

- _____
- _____
- _____
- _____
- _____

2 SOP STARTER TEMPLATE

Document your first Standard Operating Procedure:

- Process Name:

- Who Manages the Process:

- When the Process Happens:

- Tools Used:

- Step-by-Step Instructions:

NOTE: add as many steps or lines as needed but use the KISS method.

3. ONBOARDING CHECKLIST

Pre-Day 1:

- ☐ • Email setup
- ☐ • Role overview meeting
- ☐ • Tech/tools access granted
- ☐ • Trainer/Manager Plan

Weeks 1-2:

- ☐ • Shadow existing team member
- ☐ • Task assignments with support
- ☐ • End-of-week check-in

Weeks 3-4:

- ☐ • Task assignments with support
- ☐ • Independent task assignments with check-ins
- ☐ • End-of-week check-in

3. ONBOARDING CHECKLIST

30 Days:

- ☐ • First evaluation; goals for 60-day evaluation set
- ☐ • Role refinement as needed
- ☐ • Team integration complete

60 Days:

- ☐ • Second evaluation; goals for 90-day evaluation set
- ☐ • Role refinement as needed
- ☐ • Constructive feedback towards goals

90 Days:

- ☐ • Third evaluation; goals for annual performance review set
- ☐ • Role refinement as needed
- ☐ • Constructive feedback towards goals

4. ACCOUNTABILITY RHYTHM GUIDE

Suggested cadence:

- Weekly:
 - Priorities, blockers, progress
- Monthly:
 - Performance review, feedback, goals
- Quarterly:
 - Skills dev, process upgrades, team insights



BONUS:

Performance Feedback Framework

Prompt 1:

“What went well this week?”

Prompt 2:

“What could be improved and how?”

Prompt 3:

“What do you need from me to succeed?”



WRAP-UP:

Want help building a company like this? It's what we do every day.

[Schedule a free discovery session with WOWSuccessTeam](#)

SCAN HERE

