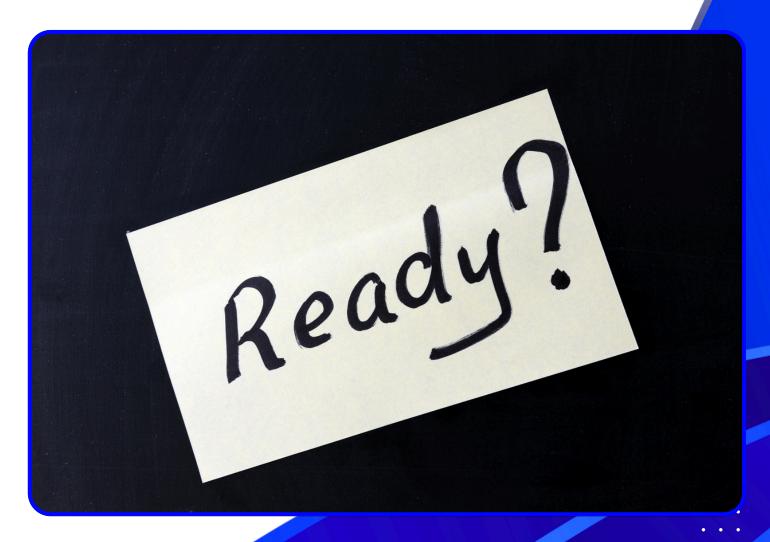


## TEAM READINESS KIT: ROLES, ONBOARDING, ACCOUNTABILITY

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





### · 1. ROLE CLARITY TEMPLATE

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

Role little:	
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 bu	t
use the KISS method.	



# : 3. ONBOARDING CHECKLIST

Pre-Day 1:
• Email setup
<ul> <li>Role overview meeting</li> </ul>
<ul> <li>Tech/tools access granted</li> </ul>
<ul><li>Trainer/Manager Plan</li></ul>
Weeks 1-2:
<ul> <li>Shadow existing team member</li> </ul>
<ul> <li>Task assignments with support</li> </ul>
<ul> <li>End-of-week check-in</li> </ul>
Weeks 3-4:
<ul> <li>Task assignments with support</li> </ul>
<ul> <li>Independent task assignments with</li> </ul>
check-ins
• End-of-week check-in



## : 3. ONBOARDING CHECKLIST

	30 Days:
	<ul> <li>First evaluation; goals for 60-day</li> </ul>
	evaluation set
	<ul> <li>Role refinement as needed</li> </ul>
	<ul> <li>Team integration complete</li> </ul>
	60 Days:
$\cup$	<ul> <li>Second evaluation; goals for 90-day</li> </ul>
	evaluation set
	<ul> <li>Role refinement as needed</li> </ul>
	<ul> <li>Constructive feedback towards goals</li> </ul>
	OO Davies
	90 Days:
$\bigcup$	<ul> <li>Third evaluation; goals for annual</li> </ul>
	performance review set
	Role refinement as needed
	<ul> <li>Constructive feedback towards goals</li> </ul>



## : 4. ACCOUNTABILITY RHYTHM GUIDE

#### Suggested cadence:

- Weekly:
  - o Priorities, blockers, progress
- Monthly:
  - o Performance review, feedback, goals
- Quarterly:
  - o 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



