

One-page role charter

Align the role before recruitment and revisit it whenever responsibilities or priorities change.

ROLE TITLE

Role name

INTERNAL OWNER

Name and role

WORKING HOURS

Core hours and overlap

WHY THIS ROLE EXISTS

The business constraint or outcome this role should address

THREE CORE OUTCOMES

- 1.
- 2.
- 3.

SUCCESS MEASURES

Quality, timeliness, communication and ownership

ESCALATION RULES

When should the person ask, pause or escalate?

TRAINING AND SYSTEMS REQUIRED

Products, processes, systems, brand, security requirements and key people

Pre-start checklist

Complete the essentials before the new team member starts so day one is focused on learning and connection.

☐ Internal owner confirmed

☐ Role charter and first-month outcomes agreed

☐ Email address and communication channels ready

☐ Tools, licences, 2FA and permissions prepared

☐ Security and confidentiality expectations ready

☐ SOPs, examples and reference material gathered

☐ Welcome call and team introductions scheduled

☐ First-week training calendar scheduled

☐ Daily check-ins booked for weeks one and two

☐ First quick-win task selected

ANYTHING STILL AT RISK BEFORE DAY ONE?

Access, training owner, workload, documentation, security or equipment

SPRINT TIP

Do not try to teach everything on day one. A strong start creates clarity, belonging and one achievable first win.

Weekly one-on-one

A focused 20-30 minute conversation to align priorities, coach performance and strengthen the relationship.

01

Wins

02

Priorities

03

Blockers

04

Feedback

05

Support

06

Development

KEEP IT USEFUL

Discuss the work, the person and what will make the next week better. Do not let this become another status meeting.

30-day review

Celebrate progress, close gaps and agree what success should look like over the next 30 days.

WHAT IS WORKING WELL?

WHERE IS MORE CLARITY NEEDED?

PERFORMANCE AGAINST AGREED MEASURES

SUPPORT REQUIRED FROM THE CLIENT

SUPPORT REQUIRED FROM SPRINT

PRIORITIES FOR DAYS 31-60

OVERALL STATUS

☐

On track

☐Support plan
required☐Role or fit review
required

DECISION PRINCIPLE

Use evidence, not impressions. Review quality, timeliness, communication, ownership and the support the person has actually received.