

SHARED MANDATE WORKSHEET | 01

Executive Assimilation: A Shared Mandate

A working agreement for an incoming executive and the leaders sponsoring the appointment. Complete together before arrival or during the first two weeks, then revisit as the role evolves.

Executive / role / CEO or sponsor / agreement date / next review

Outcomes: What must be different in six to twelve months? What defines success?

Scope: What is open to change? What is constrained, and why?

Authority: Which decisions belong to the executive? Which require approval?

Dependencies: Which people, information, investments, or peer commitments are required?

Sponsorship: What will the sponsor do when the mandate meets resistance?

Disagreement: Who resolves competing priorities, through which forum, and by when?

Companion to: [Executive Assimilation Is a Two-Way Responsibility.](#)

Build support into the role

Use the transition period to test whether the executive and the organization can deliver on the mandate together. The cadence below is a starting point to adapt.

Incoming executive commits to	Organization and sponsor commit to
Learn how decisions actually move; test assumptions with peers and teams.	Provide access to the people, information, and context needed to understand the business.
Build relationships, explain proposed changes, and surface tradeoffs early.	Clarify decision rights with peers and resolve conflicting expectations.
Seek feedback, address gaps, and distinguish evidence from interpretation.	Give timely, specific feedback and examine conditions that limit delivery.
Own results within the agreed scope and flag dependencies promptly.	Maintain sponsorship when approved changes encounter resistance; revisit the agreement when scope changes.

Checkpoint	Questions for both sides	Required output
First 30 days	What was learned? Where does actual authority differ from the agreed role?	Updated mandate and named dependencies.
By day 60	Which decisions stall? What feedback recurs? Are resources and sponsorship sufficient?	Decisions on unresolved constraints and targeted support.
By day 90	What progress is visible? Which assumptions changed? What must each side adjust?	Agreed priorities, revised commitments, and next review date.

Sponsor check-in cadence / peer forum / confidential feedback channel

Beyond onboarding: Continue these reviews when the mandate, reporting relationship, strategy, or operating conditions materially change.

JOINT REVIEW WORKSHEET | 03

Resolve friction before it hardens

Use a concrete example to understand whether the issue concerns judgment, relationships, authority, resources, or an unresolved enterprise tradeoff.

Decision or outcome at issue / date / people involved

Evidence: What happened? Where do the executive and sponsor accounts differ?

Executive adjustment: What will the leader do differently, with what support?

Organizational adjustment: What authority, commitment, or condition will change?

Unresolved disagreement / decision owner / resolution date

Revised mandate or commitments / how affected peers will be informed

Evidence of progress / next review / executive and sponsor acknowledgment

Where board oversight is relevant, summarize material changes in mandate, unresolved constraints, and executive succession implications. Direct feedback from a departing executive can also inform the board's understanding of the role.