

The Collaborative Intelligence Role Charter: Redefine the role after AI adoption, shifting the focus from execution to orchestration.

Instructions: Use this template to document the new human alpha responsibilities, KPIs, and development goals agreed on during the workshop.

Employee: _____ **Role:** _____ **Date:** ____

1. CORE MISSION SHIFT

The role is evolving from task-based actions to outcome-driven value creation

- **FROM (Legacy Focus):**

(e.g., Manual drafting, data entry, scheduling)

- **TO (Future Focus):** _____

(e.g., Strategic planning, relationship building, decision governance)

2. HUMAN ALPHA RESPONSIBILITIES

We are reinvesting the cognitive dividend into these high-value activities:

- **Strategic:** _____

- **Creative:** _____

- **Relational:** _____

3. NEW OUTCOME-BASED KPIs

Success is no longer measured by activity volume, but by impact.

1. _____
(e.g., Increase proposal win rate by 10%)

2. _____
(e.g., Generate 3 new expansion opportunities per quarter)

4. ENABLEMENT PLAN

To support this shift, we are committing to the following upskilling:

- **Target Skill:** _____

- **Resource/Action:** _____

- **Completion Date:** _____

Agreed: _____ (Employee) _____ (Manager)