

Project Tech Lead Appointment Sheet

Use this sheet to name the technical leadership needed for one initiative without creating a vague shadow-management role. The role exists to make a specific technical route, risk, and decision set easier for the team to carry. It should rotate, narrow, or end when that need declines.

01 APPOINTMENT

PROMPT

RECORD

Initiative and intended outcome

Project tech lead

Start date and next role review

Technical uncertainty or coordination problem the role addresses

Condition for rotating, narrowing, or retiring the role

02 DELEGATED AUTHORITY

THE PROJECT TECH LEAD MAY DECIDE

A PARTNER MUST BE INVOLVED

ESCALATE TO THE ACCOUNTABLE OWNER WHEN

The role commonly covers technical route, key trade-offs, interfaces, acceptance conditions, technical risks, and a clear view of what needs decision. It does not automatically make the person the only architect, people manager, project administrator, or permanent escalation path.

03 PARTNER ROLES

ROLE	WHAT THIS PERSON OR GROUP REMAINS ACCOUNTABLE FOR	WORKING AGREEMENT
Project tech lead	Technical route, material decisions, risk visibility, and workstream coherence	
Engineering manager	Staffing, workload, delivery health, coaching, and contributor support	
Product partner	Customer problem, value, scope, validation, and acceptance	
Sponsor or leadership group	Material trade-offs, capacity, commitments, and interventions beyond the team	

Add or rename roles for the actual team. The point is to make the boundaries discussable, not to enforce a universal org chart.

04 RISK AND DECISION REVIEW

CURRENT RISK, DEPENDENCY, OR DECISION	WHY IT MATTERS NOW	PTL ACTION	PARTNER OR DELEGATE	ESCALATION NEEDED	REVIEW DATE
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Use a short regular review with the engineering manager and product partner:

1. What changed in the technical route, risk, or dependency map?
2. What decision needs to be made or made visible next?
3. Is the role clarifying the work, or becoming a review bottleneck?
4. Which ownership can now move to a contributor, team, or normal operating practice?

05 ROLE REVIEW

DECISION	EVIDENCE	ACCOUNTABLE OWNER	NEXT ACTION
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Continue / change scope / transfer / end

BOUNDARY

This is a client-neutral operating template. Formal job architecture, title, compensation, performance, hiring, and employment decisions remain subject to the organization's own people, legal, and HR policies.