

Role Clarity Template

A Team-Based Process for Defining Roles That Perform

Core Responsibilities · Success Factors · Daily Activities · Role Persona

Prepare

Core Responsibilities

Keep Stop Start

Success Factors

Build the Draft

Daily Activities

Tip: Use this template to guide a team-based workshop for each role. The result is a clear, working Role Persona that can be used for coaching, hiring, and performance.

1 **Prepare the Team**

A few days before the workshop, ask participants to list their five to ten most important responsibilities and think through what the role should keep doing, stop doing, and start doing. This preparation brings multiple perspectives into the room.

2 **Set the Context**

Open the session by explaining why role clarity matters. This is not just about documenting a role. It is about improving performance, simplifying coaching, and making expectations easier to align and apply consistently.

3 **Identify Core Responsibilities**

Compile all pre-work into one shared list that everyone can see. Have each participant mark what they believe are the top priorities. Use sticky dots to visualize agreement and surface where perspectives differ.

4 **Refine with Keep · Stop · Start**

Look at the combined list. What should the role keep doing? What should it start doing or do more of? What can be stopped or delegated? This step moves the conversation from what exists today to what the role should be going forward.

5 **Define Success Factors**

Ask the group to describe what an effective person in this role looks like. Capture the mindset, behaviors, and competencies that define strong performance. Connect these to your organization's values where relevant.

6 **Finalize the Role Persona**

Build the draft from the session input, review it with the group, add supporting daily activities, and finalize. Use the completed Role Persona for coaching conversations, onboarding, and hiring.

Role Clarity Process Overview

A six-step team-based process for defining roles clearly. Each step builds on the one before, ending with a complete and usable Role Persona.

1. Prepare the Team

Share pre-work ahead of the session. Ask participants to list key responsibilities and think through Keep, Stop, and Start.

What you need:

- Participant list identified
- Pre-work prompt shared
- Session scheduled

2. Core Responsibilities

Combine pre-work, vote on priorities, run Keep / Stop / Start, and sort into ownership tiers: Lead, Major Role, Support.

What you need:

- Completed pre-work
- Whiteboard / shared space
- Sticky dots for voting

3. Keep Stop Start

Use this exercise to move from what exists today to what the role should look like going forward. This step shapes the role intentionally.

What you need:

- Ideas on how the role could be improved
- A willingness to try a new approach
- Be open to redefine the role to meeting the current needs of the business

4. Success Factors

Define the attributes, behaviors, and competencies that describe what strong performance looks like in this role day to day.

What you need:

- Agreed responsibility list
- Org values reference
- Group input captured

5. Build the Draft

Turn session input into a working draft with role purpose, responsibilities, and decision ownership. Share ahead of a review session.

What you need:

- Session notes compiled
- Review session scheduled
- Draft shared in advance

6. Daily Activities

Map activities into three tiers: Lead, Major Role, and Support. Connects role definition to day-to-day execution and the finalized Role Persona.

What you need:

- Finalized responsibility list
- Ownership tiers agreed
- Ready to finalize persona

A few days before the workshop, share pre-work with participants. Good preparation ensures richer discussion and stronger buy-in from the team.

Responsibility Pre-Work

Ask each participant to list five to ten responsibilities they believe are most important. This surfaces individual perspectives before the session.

Pre-Work Notes:

- Enter notes here.
- Participants invited:
- Session date and location:
- Key questions to prepare:
- Any known gaps to surface:

Keep · Stop · Start

Have participants think through: What should the role keep doing? What should it stop or delegate? What should it start doing?

Pre-Work Notes:

- Enter notes here.
- Participants invited:
- Session date and location:
- Key questions to prepare:
- Any known gaps to surface:

Set the Context

Plan the opening of the session. Explain that this process creates a shared, working definition of the role — one that is used day to day.

Pre-Work Notes:

- Enter notes here.
- Participants invited:
- Session date and location:
- Key questions to prepare:
- Any known gaps to surface:

Compile participant pre-work into a single shared list. The goal is to surface how the role is currently understood and where perspectives align or differ.

Build the Shared List

Combine all pre-work into one visible list on a whiteboard or shared space. Every participant should be able to see and contribute.

Responsibility Notes:

- Enter notes here.
- Items with strong agreement:
- Items with differing views:
- Responsibilities to clarify further:
- Draft ownership tier assignments:

Prioritize Together

Have each participant place sticky dots next to the highest-priority items. This creates a visual map of agreement and surfaces healthy disagreements.

Responsibility Notes:

- Enter notes here.
- Items with strong agreement:
- Items with differing views:
- Responsibilities to clarify further:
- Draft ownership tier assignments:

Organize by Ownership Tier

Sort the list into three tiers: I take the lead in... I play a major role in... and I support... This clarifies accountability.

Responsibility Notes:

- Enter notes here.
- Items with strong agreement:
- Items with differing views:
- Responsibilities to clarify further:
- Draft ownership tier assignments:

Use this exercise to move from what exists today to what the role should look like going forward. This step shapes the role intentionally.

Keep Doing

What the role does well and should continue. These are high-value activities that contribute directly to results and should be protected.

Workshop Notes:

- Enter notes here.
- Key items to keep:
- Items to stop or reassign:
- New activities to introduce:
- Decisions or follow-ups needed:

Stop Doing

What the role should eliminate or delegate. Activities that consume time without adding meaningful value.

Workshop Notes:

- Enter notes here.
- Key items to keep:
- Items to stop or reassign:
- New activities to introduce:
- Decisions or follow-ups needed:

Start Doing

What the role should begin doing or do more consistently. These close the gap between current and defined state.

Workshop Notes:

- Enter notes here.
- Key items to keep:
- Items to stop or reassign:
- New activities to introduce:
- Decisions or follow-ups needed:

Define the attributes, behaviors, and competencies that describe what strong performance looks like in this role day to day.

Personal Attributes

Describe the mindset, character traits, and personal qualities that an effective person in this role consistently demonstrates.

Success Factor Notes:

- Enter notes here.
- Attributes with strong consensus:
- Behaviors to highlight:
- Competencies to include:
- Connections to org values:

Key Behaviors

Identify the observable actions and habits that define how this role should operate day to day.

Success Factor Notes:

- Enter notes here.
- Attributes with strong consensus:
- Behaviors to highlight:
- Competencies to include:
- Connections to org values:

Core Competencies

Define the skills, knowledge, and capabilities required. Connect these to your organization's values where relevant.

Success Factor Notes:

- Enter notes here.
- Attributes with strong consensus:
- Behaviors to highlight:
- Competencies to include:
- Connections to org values:

After the session, turn the group's input into a working draft. Share it before the follow-up review so participants can come prepared with specific feedback.

Role Purpose

Write a concise 1-3 sentence summary of what this role is responsible for and why it exists. Focus on contribution, not tasks.

Draft Notes:

- Enter notes here.
- Key points to include:
- Areas needing further refinement:
- Group feedback themes:
- Changes from review session:

Responsibilities & Priorities

Document the top responsibilities organized by ownership tier. Note what matters most when tradeoffs are required.

Draft Notes:

- Enter notes here.
- Key points to include:
- Areas needing further refinement:
- Group feedback themes:
- Changes from review session:

Decision Ownership

Clarify what the role decides independently, where collaboration is needed, and what gets escalated. This prevents hesitation and overlap.

Draft Notes:

- Enter notes here.
- Key points to include:
- Areas needing further refinement:
- Group feedback themes:
- Changes from review session:

Identify the key activities, routines, and actions that ensure the role is performed consistently. Clarity here connects the role definition to day-to-day execution.

I Take the Lead in...

Activities the role owns directly. These define how most of the role's time should be spent and what the person is primarily accountable for.

Activity Notes:

- Enter notes here.
- High-frequency lead activities:
- Key collaboration touchpoints:
- Support activities to document:
- Activities needing clarification:

I Play a Major Role in...

Activities where this role contributes significantly but shares ownership. Coordination and reliable follow-through are especially important here.

Activity Notes:

- Enter notes here.
- High-frequency lead activities:
- Key collaboration touchpoints:
- Support activities to document:
- Activities needing clarification:

I Support...

Activities where this role provides assistance, information, or backup. The contribution is important but not the primary ownership.

Activity Notes:

- Enter notes here.
- High-frequency lead activities:
- Key collaboration touchpoints:
- Support activities to document:
- Activities needing clarification:



As the [Name of Role], I am responsible for...

Write a concise 2–3 sentence summary of what this role is responsible for and why it exists. Focus on contribution, not just tasks. This becomes the defining statement of the role.

My Success Factors

Attribute 1 – Describe this attribute and how it shows up in the role.

Attribute 2 – Describe this attribute and how it shows up in the role.

Attribute 3 – Describe this attribute and how it shows up in the role.

Attribute 4 – Describe this attribute and how it shows up in the role.

Attribute 5 – Describe this attribute and how it shows up in the role.

Attribute 6 – Describe this attribute and how it shows up in the role.

Priorities & Measures of Success

- Priority or top focus area 1
- Priority or top focus area 2
- Measure of success 1
- Measure of success 2

My Key Responsibilities

[Key Category #1]

- List key responsibility
- List key responsibility
- List key responsibility

[Key Category #2]

- List key responsibility
- List key responsibility
- List key responsibility

[Key Category #3]

- List key responsibility
- List key responsibility
- List key responsibility

[Key Category #4]

- List key responsibility
- List key responsibility

[Key Category #5]

- List key responsibility
- List key responsibility
- List key responsibility

My Daily Activities

I take the lead in...

- Key daily lead activity 1
- Key daily lead activity 2
- Key daily lead activity 3
- Key daily lead activity 4
- Key daily lead activity 5

I play a major role in...

- Major role activity 1
- Major role activity 2

I support...

- Support activity 1
- Support activity 2



As the Customer Service Manager, I am responsible for...

Creating a consistent, high-quality service environment where team members are clear on expectations and supported in delivering strong customer experiences. Leading and developing the team with the structure, guidance, and coaching needed to perform at a high level. Focused on strengthening customer relationships by ensuring service is responsive, accurate, and aligned with what matters most to the customer.

My Success Factors

Proactive – Takes initiative to address issues early and continually improve service delivery.

Adaptable – Adjusts quickly as priorities shift and keeps the team focused through change.

Active Listener – Understands different perspectives and uses that input to guide better decisions.

Focused – Keeps the team aligned and on task when multiple demands compete for attention.

Coaching – Provides clear guidance that helps team members improve performance and build confidence.

Accountable – Takes ownership and ensures commitments are followed through consistently.

Priorities & Measures of Success

- Protect team development and performance coaching time
- Consistent, high-quality experience in every customer interaction
- Team performance improves measurably over time
- Low repeat contacts and strong customer satisfaction scores

My Key Responsibilities

Quality Assurance

- Monitor service standards and performance metrics
- Address quality gaps through targeted coaching
- Implement practical service delivery improvements

Customer Service Delivery

- Responsive and accurate service in every interaction
- Customer issue resolution and escalation management
- Reinforce service standards across the team

Training & Coaching

- Staff skill development and competency building
- Coaching cadence and performance feedback
- New team member onboarding and integration

Teamwork

- Cross-functional coordination and communication
- Partner relationship management and collaboration

Leadership

- Daily team direction and prioritization
- Staffing, scheduling, and personnel decisions
- Operational oversight and reporting

My Daily Activities

I take the lead in...

- Team standup, priorities, and daily direction
- 1:1 coaching and performance check-ins
- Service quality monitoring and issue response
- Partner and cross-team coordination
- Tracking, reporting, and operational oversight

I play a major role in...

- New staff onboarding and training delivery
- Process audits and workflow improvement

I support...

- Service and account transaction processing
- Customer service process adherence

What comes next?

Use the Role Persona

Apply the completed Role Persona in coaching conversations, performance discussions, and team alignment. Revisit it whenever priorities or responsibilities shift significantly.

Support Hiring & Onboarding

Update job descriptions to reflect the Role Persona. Use it to sharpen interview questions and give new team members a clear picture of expectations from day one.

Build Your Growth Roadmap

Now that roles are clearly defined, use the Growth Roadmap to identify training, coaching, and development opportunities that will help each person perform the role well.

Review and Refresh

Roles evolve over time. Revisit each Role Persona periodically to ensure it still reflects how the work needs to be done and what strong performance looks like.