



## TOOLKIT 12 – CLARIFY THE KEY ROLES IN YOUR BUSINESS

- ❖ **Ensure your key resources are focused on the right priorities for your business.**
- ❖ **Help your people to add value and not cost.**
- ❖ **Ensure the successful delivery of your strategic priorities.**

People do one of two things in business, they either add value or they add cost, there are no grey areas.

One of the ways that you can ensure that your senior team is adding value is to help them to clarify their roles.

There are a number of fairly common problems that point to a need for role clarification.

### **Role Ambiguity**

Where there is uncertainty in the mind of the jobholder or others in your organisation as to what their/your role is. Their confusion throws up questions like:

- How can I add real value right now to our business?
- How much emphasis should I put on strategy or operations?
- For what areas of work can I take initiatives?
- What are the strategic priorities because the strategy is unclear?

### **Role Conflict**

Where the jobholder has to carry out more than one role in the same situation she/he can experience tensions e.g.,

- Manager who is torn in loyalty between supporting the performance or actions of his/her own staff and acting as the representative of Senior Managers.

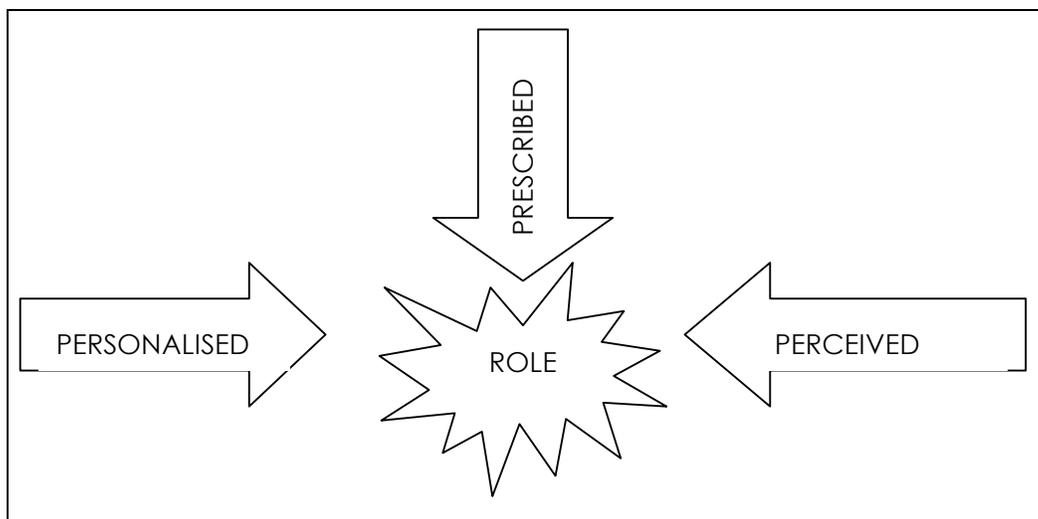
### Role Overload

Where the number of different roles that a person is asked to perform is excessive. This is different from overwork – although often involves this as well.

### Role Underload

Where a person feels she/he has the capacity to handle a more complex or a wider set of roles.

### Role Clarification – the background



### Prescribed Role

The prescribed role is that which the organisation uses to set down people's expected contribution to the overall goals and objectives. It is normally defined in a 'job description', which sets out responsibilities, authority, key tasks and location in the organisational hierarchy.

This is a mechanistic view of role, which does not take account of personal differences and changes of circumstances, i.e., growth of the business, need to cover weaknesses in performance of others etc.

### Personalised Role

The prescribed role is only part of the picture. There are factors internal to the individual, which will affect the way she/he performs the role:

*Abilities*                      Skills, professional competence, strengths

*Expectations*                      'I see this job as a stepping stone to ...'

Values: 'In my view employee relations are about ...'

Assumptions: 'My manager is really interested in ...'

Qualities: Assertiveness, patience

Uncertainty: 'I'm not sure that I can ...'

Vision: 'I want to achieve ...'

### Perceived Role

The perceptions and expectations of others in the organisation will affect the prescribed role and the personalised role. Others will have views on what the priorities for the job should be 'I don't want Contract Managers getting involved in ...'

Others will have apprehensions, expectations and doubts about the way in which the job should be carried out. As the jobholder interacts with these people – their perception will constrain and limit their behaviour.

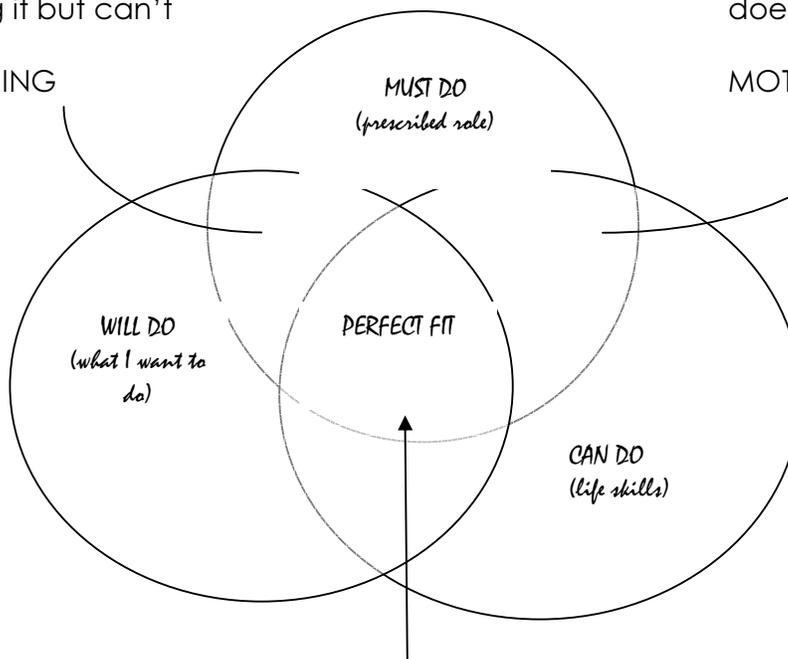
### Role Clarification – A Solution Must Do, Can Do, Will Do

Want to do it  
and should be  
doing it but can't

Can do it, and  
should do it but  
doesn't want to

TRAINING

MOTIVATION



Can do it, and want to  
do it, but not in job

description

EMPOWERMENT,  
ROLE EXPANSION

## Here's how to do it

TIP: It is sometimes helpful to use an independent facilitator to undertake this process.

**STEP 1** Ask the role holder to describe their role as they see it.

TIP: Don't ask them to get their job description out of the drawer, it's almost certain they never read it.

Push for them to describe what they actually do, e.g.,

'I go out and win new business.'

'I keep a close eye on the key indicators.'

'I see my role as motivating the team to really perform.'

- Ask them what they see the business priorities to be right now and their role in delivering it.
- Ask them what they must do, like doing or choose to do?

**STEP 2** Ask the role holders direct reports how they see their boss undertaking the role. Ask them to be honest and to look at the role and not the personality.

- What do they focus upon?
- What parts of the role are being ignored?
- What should they do more of?

TIP: Allow people space to talk. Deliberately leave gaps in the discussion to allow them to fill them. Try to say as little as possible.

**STEP 3** Ask their boss for their views on the role (not the personality), i.e., what they do rather than who they are.

- What do they see as the strategic priorities?
- What does the role holder do really well?

- What parts of the role get neglected?
- What could the role holder do more of?

## STEP 4

Summarise the feedback from Qs 1–3 into bullet points. Discuss the overall views of the role holder, their team and their boss.

- Q. Are there any themes emerging?  
E.g., all say the role holder is an excellent communicator.
- Q. Are there any significant differences between the views? Why?
- Q. What does the role holder take from it?

Here is a live example of steps 1–3 together with the action plan that was developed as a result of step 4.

### BJ – A real example

#### Role Clarification

BJ was a MD of a division of a large construction group in the West of England. He came from a project management background and enjoyed rolling his sleeves up and project managing. There was a feeling he was not fulfilling the strategic role of the MD. He felt he was doing a good job and was reluctant to change.

1. BJ's view of himself in the role:

- No job guide ← No prescribed role
- Key tasks
  - Fronting the business ← Personalised role
  - Winning work
  - Guiding it – setting parameters
  - Commercial selling
  - First over the top to solve problems
- Finds it easy to delegate, to trust people.
- Fills roles of people missing or not up to the job. ← Perceived role
- BJ's strategic priorities
  - Satisfied customers
  - Right people
  - Financial results

Overall: Business winner, hands on, troubleshooter, business builder.

2. BJ's team view of BJ:

- Close team, very flexible
- Strong charismatic, leadership style (can sometimes cause a halo effect, i.e., everything that BJ does is good)

Areas they thought BJ should consider developing:

- More networking with longer term partners
- Need a clearer strategy
- Need to backfill systems – IT etc.
- Need to free up time to work 'on' as well as 'in' the business
- Need to take training and development of staff much more seriously
- Develop teams to enable directors to direct and not be so 'hands on' operational
- Need to improve internal communications

3. BJ's bosses view of BJ:

- Good role model
- Very hardworking hands on
- Very good project management skills

Areas to consider developing:

- Use of systems to control business more effectively
- Networking with targeted partners – longer term
- Focus on priorities (not necessarily immediate problems)
- Being open minded and listening
- Taking more responsibility for reportage

- Do 'system slippage' type investigations
  - Need to turn strategic priorities into objectives for people, i.e., more focused delegation
4. BJ's Review – Action Plan
- Get a clear strategy
  - Spend more time networking
  - Create time to direct and work on, as well as in, the business
  - Improve systems
  - Develop a training plan
  - Improve internal communications

BJ really benefited from the role clarification, which came from his boss and his team. It helped him to consider his prescribed role as MD and that the role demanded more than just following his project management inclinations (personalised role). He responded positively to the feedback.

## STEP 5

Repeat the exercise with all members of the team.

- This enables the CEO to be certain that the top team is focusing their energies on the strategic priorities of the business. It also significantly increases the chances of long term success.

Step	Output (example)
1 ask the role holder to explain what they do (as they see it)	<b>Business development, linking key accounts to key account managers</b>
2 Ask subordinates how the role holder performs their role	<p>What do they do well?  <b>Always out of the office looking for business</b>  <b>Always positive</b></p> <p>What is being ignored?  <b>Communication and advising us of issues that they hear when they are out.</b>  <b>Asking for staff feedback on key accounts</b></p>

	<p>What could be done better? <b>Paperwork</b></p>
<p>3 Ask their manager how the role holder performs their role</p>	<p>How does what they do link to the businesses strategic priorities? <b>Our key is to grow the business by 12% (net) pa so keeping old customers happy and obtaining new customers is paramount</b></p> <p>What do they do well? <b>Always out of the office and getting new business</b></p> <p>What is being ingnored? <b>Solving existing profitable customers issues quickly enough</b></p> <p>What could be done better? <b>Diary management Staff moral</b></p>
<p>4 Summarise the above points and look for themes. Discuss these with the role holder and agree priority steps to address issues arising</p>	<p>Positives <b>Out of the office Good at getting new business</b></p> <p>Improvement areas <b>Communication during the day when issues are highlighted Keeping paerwork and diary up to date</b></p>
<p>5 Review in monthly one to ones</p>	<p>March – Diary management improved and staff feeling more comfortable that you are involving them as soon as issues arise</p>

Step	Output
1 ask the role holder to explain what they do (as they see it)	
2 Ask subordinates how the role holder performs their role	<p data-bbox="505 520 834 552">What do they do well?</p> <p data-bbox="505 663 839 695">What is being ignored?</p> <p data-bbox="505 806 922 837">What could be done better?</p>
3 Ask their manager how the role holder performs their role	<p data-bbox="505 997 1292 1062">How does what they do link to the businesses strategic priorities?</p> <p data-bbox="505 1142 834 1173">What do they do well?</p> <p data-bbox="505 1253 857 1285">What is being ingnored?</p> <p data-bbox="505 1362 922 1394">What could be done better?</p>
4 Summarise the above points and look for themes. Discuss these with the role holder and agree priority steps to address issues arising	
5 Review in monthly one to ones	