

Role Clarity Template

A team-based process for defining roles that perform.

Clear roles create stronger teams. When a team member knows what they own, what strong performance looks like, and how their daily work connects to team goals, performance improves, coaching becomes more focused, and accountability feels natural.

Most instances of role confusion builds slowly as responsibilities shift, priorities change, and assumptions go unspoken. This template gives you a structured process for resetting that clarity, and provides a finished Role Persona each team member can reference for clarity on where their focus should be.

Leaders should plan for one to two working sessions with each peer group, with some preparation in between. The conversation that happens during the process is invaluable as the input will help to inform the document that comes out of it.

THE PROCESS

Step 1 · Prepare the Team

A few days before the session, ask the team member to list five to ten responsibilities they believe are most important to their role. Have them think through what the role should keep doing, stop doing, and start doing. Good preparation makes the session more productive.

Step 2 · Set the Context

Open the session by explaining why role clarity matters. This is not just a documentation exercise. It's about creating a shared, working definition of the role, one that both of you can use in coaching, planning, and performance discussions.

Step 3 · Identify Core Responsibilities

Compile all responsibilities into one shared list. Use the Keep · Stop · Start exercise to clarify what the role does well, what can be eliminated or delegated, and what should be added going forward.

Step 4 · Define Success Factors

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

Step 5 · Draft and Refine

Build the first draft from the session input and share it for review to confirm it captures the spirit of the group feedback. A second brief conversation usually sharpens the language and strengthens buy-in. Daily activities can be added before or after this conversation.

Step 6 · Finalize and Put It to Work

Use the completed Role Persona in coaching conversations, onboarding, and performance discussions. Update job descriptions to improve recruitment efforts. Revisit it when roles or priorities shift significantly.

PAIR THIS WITH OTHER TOOLS

Growth Roadmap

Identify development, coaching, and training opportunities that will help the team member grow into their Role Persona over time.

www.leadership-tools.com/leadership-action-plan.html

Project Prioritization Template

Once the role is clear, use this template to identify and rank the initiatives the role should focus on first.

www.leadership-tools.com/project-prioritization-template.html

"A role that's clearly defined is easier to coach, easier to hire for, and easier to hold to a standard."



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

- [Enter priority or top focus area]
- [Enter priority or top focus area]
- [Enter measure of success]
- [Enter measure of success]

My Key Responsibilities

[Key Category #1]

- [Enter key responsibility]
- [Enter key responsibility]
- [Enter key responsibility]

[Key Category #2]

- [Enter key responsibility]
- [Enter key responsibility]
- [Enter key responsibility]

[Key Category #3]

- [Enter key responsibility]
- [Enter key responsibility]
- [Enter key responsibility]

[Key Category #4]

- [Enter key responsibility]
- [Enter key responsibility]
- [Enter key responsibility]

[Key Category #5]

- [Enter key responsibility]
- [Enter key responsibility]
- [Enter key responsibility]

My Daily Activities

I take the lead in...

- [Enter daily lead activity]
- [Enter daily lead activity]
- [Enter daily lead activity]
- [Enter daily lead activity]
- [Enter daily lead activity]
- [Enter daily lead activity]

I play a major role in...

- [Enter major role activity]
- [Enter major role activity]
- [Enter major role activity]

I support...

- [Enter support activity]
- [Enter support activity]
- [Enter support activity]



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