

How do you ensure roles and responsibilities are clear in your team? – a practical tool



“We need to spend time getting clearer about roles and responsibilities!” This is one of the most common themes team members mention when I ask them what would improve the effectiveness of their team. They talk about the difficulty of getting a shared understanding of who owns what and a sense of silo working and turf wars. In the worst cases, members of a leadership team come together, contribute only when the topic is in their area, give a passing nod to the idea that they are a team with joint accountabilities and then leave and go back to their functional roles when they leave the room.

If you recognise even parts of this, do read.

I noticed that I struggled to start writing. Was this my natural resistance to hard and fast boundaries? (After all roles and responsibilities are constantly shifting, aren't they?) Or was it a sense that clearly defining roles and responsibilities could undermine the very things that enable high performing teams: a clear, shared purpose and agenda to which team members hold each other jointly accountable?

With this thinking in mind, I've included some questions to consider before we get to our practical tool.

Before you jump into a discussion on roles and responsibilities – ask a few more questions

There's a risk that "roles and responsibilities" is a generalisation that masks something else (a bit like 'communication'). I've seen overlap between roles causing conflict; gaps which mean that important things fall through the cracks; sometimes this is a safe way of naming lack of collaboration and support.

So here are some questions to consider/ ask which can unpick the problem:

- What's the real issue here?
- What are the challenges which team members notice that lead them to say roles and responsibilities is an issue?
- Why is this a problem? What's the impact?

If you have done that and it seems like an exercise on clarifying roles and responsibilities will help the team...

Let me assume that you are clear about your shared purpose as a team – that's an important foundation. If not, you might first want to read our article [How to Articulate a Robust Team Purpose](#).

Tool: Clear roles and responsibilities

Group size: 6-8 (can be done with 12 and it takes longer)

Timings: Typically, 90 – 120 minutes

Key message/ outcome of the exercise: Team members are clear about who owns what, what they jointly own and have identified ways to address gaps or grey areas.

Key set up steps:

- A flipchart for each member of the team
- Post it notes and a central flipchart on a table with the heading "We are jointly accountable for..."
- If appropriate, you may also want other materials such as organisation charts on view.

Key facilitation steps:

1. *Explain why we are doing this – how it links to the issues identified by team members and the intended outcomes*
2. *Ask team members each to prepare a flip chart with 2 columns: I own... I contribute to/ support (this is for things they support others in the team). As they do this, ask them to note any grey areas/ gaps or issues and any areas they would define as the joint accountability of the whole team on a post-it note (one per post-it note) – this takes about 15 minutes.*
3. *Invite team members to place post-its for gaps/ grey areas on a single flip chart **and** place those for joint accountability on the chart you prepared in the middle.*

4. *Ask team members to visit each other's flip charts and put a '?' against anything that is not clear; an 'X' where they disagree/challenge; "D" against areas of duplication (particularly in ownership).*
5. *Explore and discuss each of the "?", "X" and "D" in turn and invite the team to note any recommendations so there are proposals for where ownership sits. (This is the part of the exercise that can eat time – see our article "[How to Cultivate Shared Airtime in teams](#)" for a process that will help.*
6. *Invite team members to discuss their proposals, requests and offers in pairs (5 minutes each way).*
7. *Discuss and finalise proposals and decisions as a whole group.*

Extension to this exercise:

Invite team members to review and decide on

- their 'deal' – how they will handle gaps/ grey areas in the future so that these are speedily addressed.
- area of joint accountability – how they will ensure they pay attention to these and hold each other accountable. Often this leads to regular agenda items or new meetings (such as succession planning and capability development).

Tips:

- If you notice there are no "D" identified, it could be that levels of challenge and trust are low in this team. It's worth testing further "If you were a new team member/ new boss for this team – what might you challenge?"
- This exercise can be adapted for cross team collaboration. Each team prepares their flipchart and notes on post-it notes any gaps/ overlaps/ grey areas which are undermining collaboration. The teams can then split into pairs (1 from each team) – do explore ideas for how to address the gaps/ overlaps and grey areas.
- You can speed up this exercise if you ask team members to come prepared with their list of things they own and activities that they contribute to/ support other team members with.
- You can tweak and adapt this to fit with tools you already use. Many clients I work with use RACI analysis (responsible; accountable; consulted and informed). This is useful where engagement and stakeholder management is an issue for the team.

Alyse Ashton

For more fresh thinking, resources and practical tools visit <https://eye2eyedev.com/resources/>

References:

For more information on RACI

https://en.wikipedia.org/wiki/Responsibility_assignment_matrix

Alyse Ashton and Richard Spence are the co-authors of the Team Health Check and draw on over 50 years' combined experience as team coaches and facilitators working with global organisations.



alyse@eye2eyedev.com
uk.linkedin.com/in/alyseashtoneye2eye

richard.spence@clearpictures.org.uk
<https://www.linkedin.com/in/clearpictures/>

Feel free to print or forward this resource in its entirety, but please ensure you include the logos and authorship when doing so. Thank you!