

Clarify Roles

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When and With Whom Might You Use This Tool?

Use this tool with your manager to clarify your understanding of which roles deserve most time and effort.

As a leader, use this tool to help your direct reports understand the importance of each of their roles in the organization and to plan their allocation of time accordingly.

How to Use It

1. List your primary roles (up to four).
2. Rank your roles in terms of importance to the organization.
3. Determine your current allocation of time in each role.
4. Discuss and revise your roles with your manager as needed.
5. Reach agreement on the importance of each role relative to the other roles and determine where you should be allocating your time. Ask:
 - Does the amount of time I spend in each role correspond with the importance of each role?
 - Do I notice anything that suggests changes I need to make, either in my own roles or for my reports?
 - Am I using my time where it is most needed? Are my reports using their time where it is most needed?

Clarify Roles

| List Roles | | Rank Order | % Time | Necessary Adjustments |
|------------|--|---------------|-----------|-----------------------|
| Role 1 | | | | |
| | | | | |
| Role 2 | | | | |
| Role 3 | | | | |
| Role 4 | | | | |

THE 3 QUESTIONS

WHEN AND WITH WHOM MIGHT YOU USE THIS TOOL?

Use this tool as a way to increase collaboration and alignment in multiple directions of your work—towards your customers, co-workers, direct reports, and manager.

HOW TO USE IT

Identify a person who is affected by your work.

- 1 **Meet with that person and ask them the following 3 questions.** (Record their responses in the corresponding spaces provided.)

Q1: How does somebody in my role affect or potentially affect your ability to do your work (both positively and negatively)?

Q2: From your perspective, how could a person in my role be most helpful to you?

Q3: How and at what frequency would you like me to check in and stay accountable to you for my impact on your ability to do your work?

- 2 **List possible adjustments.** Given what you have learned in your conversations, list any adjustments you could make in your work to be more helpful.

- 3 **Set check-in method and cadence.** You will measure your impact on this person by checking in with them according to the schedule you agreed to in response to Question 3. Record in this column the check-in method and cadence you agreed to with this person.

PERSON

| 3 QUESTIONS | | | 2 | 3 |
|---------------|--|--|----------------------|-----------------------------|
| | | | POSSIBLE ADJUSTMENTS | CHECK-IN METHOD AND CADENCE |
| Q1 Learnings: | | | | |
| Q2 Learnings: | | | | |
| Q3 Learnings: | | | | |

THE 3 QUESTIONS