

LEARNING TO MASTER THE MATRIX



WORKSHEET #3

ROLE CLARITY TROUBLESHOOTING GUIDE

PRESENTED BY





Our roles are not defined—where do we start?

On page 2 you will find a template for a RACI document. Here are the steps to completing this template:

Step 1: Identify the key tasks and decisions

What are some key tasks/decisions that you would want to clarify with a partner or partner’s team?

Step 2: Bring together as many people as is practical into this process to determine the RACI designations

Who are some of the people you would bring into this process?

TIP! For a reporting relationship matrix, include both bosses and bring in the employee to review the document.

TIP! For teams, bring the full team together to discuss and include their bosses in a review discussion.

TIP! The closer people are to the construction of this plan and the more opportunity they have to ask questions, the better your product and their understanding will be.

Step 3: Test for clarity

Whether your role definition is high level or as detailed as a RACI chart, test for clarity and agreement by running it through some “what if” scenarios with your team or partner, or maybe even garner outside opinions.

What questions will you use to test for clarity?

What if one of us gets a question that is part of the other’s role?

- > *Will a shift in timelines change the roles at all?*
- > *How do we use each other’s “input”? When do we need it, and when do we make the call ourselves?*
- > *What if we reach an impasse on a decision we need to make?*
- > *Other:*

Step 4: Keep it accessible and make it easy to edit

How will you keep this accessible and easy to edit?

TIP! Roles shift over time or reveal themselves differently based on the specific task or project, so updating this knowledge is key.



RACI Chart

| | RESPONSIBLE: Responsible for completing a work product | ACCOUNTABLE: Ensures this task is completed | CONSULT: Gives input into how task is carried out or into work product | INFORM: Kept apprised of progress and outcome |
|------------------------|--|---|--|---|
| DECISIONS/TASKS | | | | |
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We Have Defined Roles But There Is Still Not Enough Clarity

You may be trying to solve the wrong problem:

Don't assume role clarity is the problem, look at trust.

Role clarity can seem like an easy solution for teams and partnerships—far easier than dealing with the fact that they don't trust each other. By itself, clarification of roles won't increase trust or improve a partnership. But when coupled with genuine intent and actions to improve the partnership (like those outlined in Essential #1), role clarity can help put a relationship back on track.

You may be using role definitions in the wrong way:

Use role definitions offensively, not just defensively.

Any role clarity mechanism runs the risk of being used as a weapon. Especially in low-trust settings, it can become a conduit for trust issues. Role definitions are best used proactively, in initial project planning and as tasks or decisions emerge, not when you are reacting to a boundary breach and emotions are high.

Your definitions may need updating:

Don't ever put it on the shelf.

Role clarity is a point in time, and the outline is a living document. There will be infractions. Sometimes those infractions can lead you to an even better, clearer definition. Revise and edit accordingly.

You may be expecting too much:

Roles can only be defined so much—don't expect total clarity.

Make sure you are building trust, using definitions in the right way and updating when required—outside of that expect some ambiguity (and get good at working with it).

What is the root cause of role clarity issues in your group? What steps can you take?

I Feel Like Someone Is Stepping Into My Area Of Responsibility—What Do I Do?

Step One: Understand the cause.

Boundary breach happens for a variety of reasons ranging from innocently unaware to deliberately defying. The explanations can be thought of as a continuum:



Why do you think this person is stepping into your area of responsibility?

Step Two: Decide if it should be tackled.

You should let it go if this is the first time you have seen the person make a particular mistake, and it doesn't have much of an impact on your goal or the morale of the people involved. Let it go if it is truly an exception that won't come up again. Also let it go if the politics created by addressing the issue are worse than the role infraction itself.

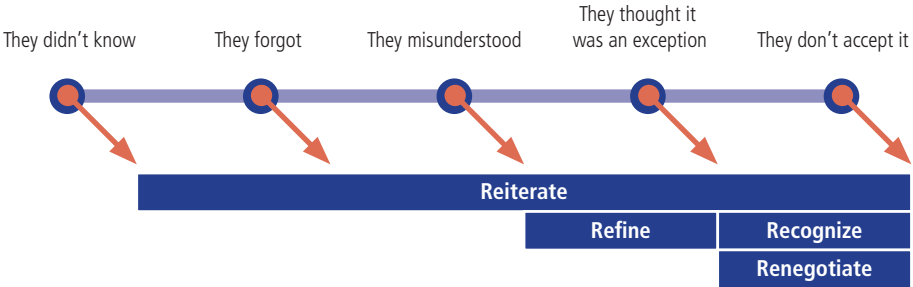


What is the frequency and impact of their actions? Should you tackle this issue?



Step Three: Strive for Partnership-driven resolution.

When you have decided to tackle the boundary issue, a little planning is called for because the person you are approaching most likely is or should be a partner. Here’s how the cause of the boundary breach impacts your approach:



The causes on the left-hand side require a simple reiteration of the role definitions. In the middle (misunderstood or thought it was an exception), reiteration is still needed, but so is refining of the role definitions.

In the case of lack of acceptance, or when there is a trend for repeated missteps by the same person, a number of carefully delivered messages are necessary. You will need to reiterate, potentially go as far as renegotiating roles and recognize that accepting the role may be difficult.

What will you need to do to resolve this issue? Reiterate? Refine? Recognize? Renegotiate?

TIP! Walk in assuming it a simple misunderstanding. We tend to see our own boundary breaches as accidents or attempts to “help out,” but see others as overstepping their bounds and encroaching on our territory. If you grant their intentions the same leniency that you grant you own, you will walk in assuming best intent—which sets the tone for the interaction.



Step Four: Have a partnership-based conversation.

The conversation starts with a “safe opening” and then based on what you need to do (Reiterate, Refine, Recognize, Renegotiate) your conversation builds from there. Below are examples of what this might sound like. In the far right hand column, write out what you will say in your conversation.

| | EXAMPLE | WHAT YOU WILL SAY... |
|--|---|----------------------|
| START WITH A SAFE OPENING | “I wanted to circle back on the role agreements we set up last month...” | |
| KEEP IT TENTATIVE AND REITERATE | “We had agreed that you would complete the paperwork and keep me informed, but I haven’t heard anything from you on it. Maybe I missed an email from you?” | |
| RECOGNIZE IT MAY BE TOUGH TO ACCEPT | “I know it must be frustrating having me in the middle of this with you and Angel, but I do think keeping me updated will help us better manage this consistently.” | |
| RENEGOTIATE | “Would it make more sense for us to just set up 30-minute calls each week, than to leave it impromptu?” | |