

Roles & Responsibilities

Use the prompts in this worksheet to help you structure the different roles you need fulfilled in your organization and the responsibilities each role will hold.

The Work:

Before you can effectively define roles and their responsibilities you need to have a keen understanding of all the work which needs to be done in order to operate your organization. Think about work that's currently done daily, weekly, monthly, or more sporadically, as well as work that will need to be added to support your strategy and plan. You'll split this work into two separate categories as you brainstorm, Camp Work and Climb Work.

Step 1: Brainstorm

Use the following spaces to brainstorm all of "the work" in your organization. Write down anything that comes to mind for now, you'll be able to consolidate and re-organize in the following steps.

Camp Work

These are activities that may not be strategic but need to get done. (Bookkeeping, Cleaning, Maintenance, etc.)

Climb Work

These are activities that directly impact reaching your Summit & Objectives. Your Task Lists are a great starting point.

Camp Work

These are activities that may not be strategic but need to get done. (Bookkeeping, Cleaning, Maintenance, etc.)

Climb Work

These are activities that directly impact reaching your Summit & Objectives. Your Task Lists are a great starting point.

Step 2: Build the Packs

Sort and organize the Camp and Climb work you brainstormed into individual packs that should be carried by a role in your organization. Group related work together, each pack should represent a common purpose, area of your business, and/or level of authority. Most packs will include a mix of Camp and Climb work. Make sure every task has a pack. If something is left out, it may point to a missing role or a structural gap in your team.

Role 1

Camp Work

Climb Work

Role 2

Camp Work

Climb Work

Role 3

Camp Work

Climb Work

Role 4

Camp Work

Climb Work

Role 5

Camp Work

Climb Work

Step 3: Refine the Roles

Your Mission is where you begin to drill down into not only where your business is going, but how it's going to get there. If your Vision is where you want to go, your Mission is what you're doing right now to get there.

Role Title:

Person/s Performing This Role:

Summary:

Key Responsibilities

Camp

Climb

Role Title:

Person/s Performing This Role:

Summary:

Key Responsibilities

Camp

Climb

Role Title:

Person/s Performing This Role:

Summary:

Key Responsibilities

Camp

Climb

Role Title:

Person/s Performing This Role:

Summary:

Key Responsibilities

Camp

Climb

Role Title:

Person/s Performing This Role:

Summary:

Key Responsibilities

Camp

Climb