Role clarification for Teams

Short exercise: 20 mins
Enhanced exercise: 1 hour

Background
A key characteristic of effective teams is clarity about the roles and responsibilities of each person. One of the most common sources of conflict and dissatisfaction in teams stems from ambiguity between team members and between the team and the leader. Role clarification work is designed to help team members and the manager/team leader develop clarity about the roles and responsibilities of the team. Members also identify gaps and overlaps and make plans for dealing with them.

There are two team building activities below, which can be used individually or together. They are useful when teams are first formed, and can also help existing teams identify if lack of role clarity is an issue for them; it could also be viewed as a good “spring cleaning” or review activity that teams should consider on a periodic basis. Defining roles and responsibilities helps move your team from “storming” to “norming”, or help “performing” teams who’ve lost their way get back on track.

Short exercise – Identify ambiguities and remedies – 20 mins

As a group, discuss roles and/or responsibilities which are ambiguous, gapped, or ‘painful points’. Write them down on a flip chart and then ask each team member to come up and place a dot next to the three points they’re most keen to resolve.

In addition to these points, look for gaps in capabilities and areas where only one person is able to take responsibility. Brainstorm ways to fill those gaps and/or where a responsibility is no longer required. This may help you to cut down on unnecessary tasks.

After your brainstorm, prioritise three ideas to try out, with an eye toward the highest concentrations of dots. Break your top three ideas into bite-sized tasks, and agree on owners and due dates for each.
Enhanced exercise – Seven Steps Model – 1 hour

This exercise creates detailed discussions about roles and responsibilities within the team, and involves team members asking searching questions about their current role, areas of the role that are unclear, overlaps with other team members, and provides the opportunity for the team to provide feedback to each individual on what they would like to see “more of” and “less of”. By setting aside time to give and receive feedback in a positive way, your team members will avoid blow-ups and stress caused by ambiguity.

Below is a step by step guide to the exercise; ideally this should be facilitated by someone with good experience of facilitation, and plenty of time allowed for debrief and learning. It is typically a challenging and interactive session, designed to evoke some constructive conversations and actions to take forward, so people may need to do some warm up work before going into the exercise.

**Step 1: Originate**
On a large flip chart, each person writes down their title and a short description of their role. Then, post the role descriptions around the room where they can be seen by all (usually up to 16 sentences)

**Step 2: Role Requests**
Next, participants move around the room making notes and suggestions on each person’s role statement. For example, if you like what someone does, write, “I’d like you to keep on doing X.” Be sure to initial anything you write on someone else’s chart. If you’d like to suggest a role change, please use the words “more of” and “less of” (instead of good or bad, right or wrong): “Tom, I’d like you to return phone calls more quickly” JM.

**Step 3: Communicate**
Each person is invited to participate. The first volunteer reads their original role statements aloud, plus any feedback that was added and the author’s initials. The person asking for clarification then paraphrases what they think the written comment means and asks for feedback.

_Here’s an example:_
Read: “Tom, it says here on the chart answer phones quicker.”
Paraphrase: “What I hear you asking is that I get back to our customers within 3-4 hours, not 24 hours. Is that correct?”
Ask for Feedback: “Could you help me with some feedback”

**Step 4: Provide Feedback**
It is now up to team members to offer feedback to each other. The goal is to provide specific and candid information about what you want the other person to do (More of, less of, Keep on) in a respectful way.

**Step 5: Validate**
Clarification proceeds evaluation. Before the role negotiation process moves on to the step of negotiating a yes or no, summarize in your own words what you heard others request of you.

**Step 6: Negotiate**
The person clarifying their role may choose between three kinds of responses to role requests:
- **YES** - Answer “Yes” if you are willing and able to make the requested change.
- **NO** - Answer “No” if you can articulate that the change will not help the team meet its goals.
- **NEGOTIATE** - Ask team members for the help you need to make the change: “I’ll do X if you’ll do Y…”

**Step 7: Document**
The team documents what has been agreed upon so members can follow up. Times are set for updating agreed-upon commitments. Resolution is best accomplished one-on-one in a private setting. If conflicts arise and an easy resolution is not forthcoming, both members in the role negotiation may invite other
team members to help. In an effort to support the development of acceptable behaviour, the team offers suggestions for changes that will help individuals the most. Be creative!

Debrief and Close
At the end of the meeting, it’s a good idea to close with a conversational critique of the process. Encourage team members to talk freely about what was effective and useful; which steps were difficult, if any; and how to continue the process in the future as a helpful exercise for the team.

Overview of 7 Steps Model

1. Originate
   Describe what you do (up to 10 sentences) on a flip chart.

2. Role Requests
   Do More Of...
   Do Less Of...
   Keep On...

3. Communicate
   - Read, paraphrase, ask for feedback...
   - "Could you give me some feedback?"

4. Feedback
   - "Specifically, I'd like you to do more of..."

5. Validate
   - "As an example, what you could do less of..."

6. Negotiate
   - "Yes..."
   - "I agree to do X"
   - "Yes, I'll do X..."
   - "No, I cannot do Y..."
   - "I'll do this if you'll do that."

7. Document