Working Together: Team Roles and Responsibilities Exercise Guide

Purpose and Introduction

Role alignment and clarity support strong teamwork which leads to personal and professional development and success.

The exercises in this guide are recommended to be used when new teams come together or team structures change.

Working as a Team

Organizations often form teams for different purposes, consisting of members with diverse roles and experiences. As a result, it's not always clear who is responsible for what, even among highly collaborative team members. Individuals may have their own ideas about what other team members should be doing.

Lack of clarity regarding the roles, responsibilities, and expectations of the individuals within the team can impede success. Role expectations should be discussed to avoid misunderstanding. Team members should come together to review, assess, and discuss responsibilities across roles, particularly when new team members engage.

Various tools exist to help your team better determine, define, and assign roles and responsibilities. Consider using one of the following based on the specific role clarity situations a team is experiencing.

Discussing roles within a team can be difficult - consider utilizing an ice breaker to help start the discussion: see Role Responsibility Discussion Ice Breaker.

Team Tools and Exercises for Role and Responsibility Clarity

Review these tools within your team to determine if they can further help support and grow your team experience.

Select the links below to learn more about the available tools:

Team Initiation Exercise

Why use this exercise
Careful consideration of team purpose and members should occur when a new team is formed. By assessing and determining some basic criteria the "storming and norming" period for a team can be reduced and productivity accelerated.

When to use this exercise
This exercise is most useful when a new team is being formed, roles are being identified, and members are being selected.

How to use this exercise
Consider the following questions when establishing a new team and assigning team member roles.

1. **How will team members be engaging?** Different expectations and dynamics exist depending on whether a team is coming together to support a long-term need, daily operations, or a temporary project engagement.

2. **What roles are required, and can/will members support multiple roles?** Team roles often differ from HR positions therefore it is important to clarify member roles and the associated responsibilities.

3. **Do the team roles or people serving in those roles have overlapping or similar responsibilities**? This is common particularly when a team is dealing with ambiguous or complex topics. Rather than creating walls between members, use communication to manage anticipated role overlap and achieve greater team collaboration, perspective, and support.

4. **What are the team members' experience levels and how will they impact expectations for working together and role responsibilities?** As resources gain experience and their capabilities mature the ability to take on more responsibilities increases allowing for greater cross-team functionality and flexibility. But this can also contribute to role clarity, confusion, and conflict. Additionally, newer resources may bring different perspectives and historical references.

5. **Do team members want or need an opportunity to grow and learn?** Teams can provide good opportunities for members to try new roles, expand their knowledge, and grow their capabilities and talent.

Team Role Discovery

Why use this exercise

This exercise aids members in understanding the team's **formal** and **informal** roles and responsibilities. Additionally, it assists team members in reviewing where there is role distinction and where there are role overlaps, and how overlaps can be managed to contribute to and improve team collaboration and success.

> **Formal roles** are generally defined, established functions necessary to accomplish the goals of the team.
>
> **Informal roles** are assumed based on personalities, motivations, styles, and experiences. Examples of informal roles include spokesperson, social coordinator, optimist, realist, catalyst, etc.

When to use this exercise

The Team Role Discovery exercise is most useful when work may be dynamic or ambiguous, roles have overlap, or when there is not always clear distinct lines of handoff or separation across teams or positions.

This tool should be used to increase clarity and agreement of team member roles and responsibilities; and to establish comfort discussing roles and complex team dynamics.

How to complete the exercise

In this exercise each team member outlines the roles and responsibilities they believe they individually contribute. This is then presented and discussed with the team, and members then have an opportunity to respond and share their expectations of other roles on the team.

1. Identify a facilitator either from within or from outside the team.
2. Have each team member write a brief bulleted description of what they believe their formal and informal responsibilities are on the team. Each member should consider the skills, talents, and expertise they bring to the group as well as the work expected and required by the team.
3. Each team member then presents to the team. The facilitator should prompt the other team members to ask questions and provide feedback in terms of their own expectations. Compare and contrast, discuss any differences in opinions or observations.
4. Once all team members have presented, identify the role and responsibility gaps, and clarify the role conflicts.
5. As a team, come to an understanding of and consensus on each person's roles and responsibilities, and how gaps and conflict will be resolved; then update the team role descriptions.

Next Steps

Save your completed team role descriptions to a location accessible by all team members and revisit as needed or when the team situation changes.

Complement your Team Role Discovery exercise with a [Work Agreement](#).

Work Agreements

Why use a Work Agreement

The purpose of a team created work agreement is to ensure the team shares responsibility in defining expectations, takes ownership in their self-organization process, and commits to how they will work together.

A work agreement serves as a document of shared understanding where parties have agreed upon specific matters that become the rules of behavior and engagement, minimizing friction, and providing a template for what is expected.

When to use a Work Agreement

A Work agreement can be helpful when looking to increase individual accountability for team tasks, when member operational practices differ, and when wanting to reduce the possibility of team conflict.

Role responsibility ice breaker tools can also aid in deciphering operational and personal work differences that should be included in a Work Agreement discussion.

How to use a Work Agreement

1. Prior to starting, determine how mitigation will be done when there are disagreements in how the team will work.

2. Meet as a Team to identify and discuss work agreement questions – the things that need to be decided by the team. It is recommended that a “starter” list of questions be used to kick-off the discussion.

   See Appendix A for example Work Agreement Questions. You can use and adjust these questions to create a starter list.

3. As a team, brainstorm responses and then decide and document the team’s answer.

Note: An effective work agreement does not have to be formally documented. The discussion exercise alone may clarify expectations and establish team harmony as well as foster an environment where team members feel comfortable speaking up about team dynamics. In other words, don’t over think or over engineer the process.

Next Steps

Save your team’s completed work agreement to a location accessible by all team members and revisit as needed or when the team situation changes.

Complement your team’s Work Agreement with an Ice Breaker exercise, Team Role Discovery exercise, and/or a RACI.

RACI Matrix

Why use a RACI

A RACI matrix - **R**esponsible, **A**ccountable, **C**onsulted, **I**nformed - is a tool to provide role clarity, drive task accountability, and support teamwork.

RACIs can be leveraged when ownership of an explicit task comes into question. With the myriad of tasks shared across teams and organizations, and the variety of overlapping, interdependent but independent work and services often occurring, it is easy to lose the clarity of task ownership; sometimes more than one person is owning a task and sometimes no one is.

RACIs are most useful for less experienced teams who are learning their positions and roles, and when work is unambiguous and with clearly discernible hand-offs from one team member to another.

When to use the RACI

RACIs are most helpful when needing clarity of ownership for pre-identified, explicitly known, and clearly separated tasks and activities. For project implementations, the RACI is a great tool to be utilized during the project kick-off and during project team meetings.

Evaluate using a RACI matrix when there are questions, concerns, or conflicts regarding role responsibilities within your team.

Example RACI definitions

R = Responsible. Who is responsible for completing the work, who is assigned the function, the doer.

A = Accountable. Who is accountable for ensuring this task or function is properly completed, who has the authority to make the final decision.

C = Consulted. Who needs to provide input for the task or function to be properly performed and completed.

I = Informed. Whose work is impacted by this task, who needs to be informed of the results, kept in the loop.

How to Use the RACI

1. Answer the following questions as a Team **<u>BEFORE</u>** completing the RACI matrix.

   - What type of team engagement is the RACI for?
   - What is the objective for completing the RACI? (better team collaboration, hierarchy leadership organization, addressing specific engagement challenges, etc.)
   - Who is the audience for the RACI (internal, external or both; executive leadership, middle management, customers, analysts, informatics, learning services, PMO, etc.)?
   - What roles and positions need to be included in the RACI?
   - What task responsibilities apply and don't apply to the team engagement?

- What task responsibilities are missing from the template?
- What definitions will be used for the RACI?

2. Create the team RACI using a RACI Template.
   - Select the appropriate RACI Template. See Appendix B for example templates.
   - Outline the key tasks relevant to the team down the left side of the matrix; be sure to clarify terms that may be interpreted by team members differently.
   - Complete a RACI by Role matrix by entering the team roles along the top of the matrix (Note: roles may be different than operational position). For each task/function and roles enter an R, A, C, or I to indicate the expectation for the role and the task/function.
   - Alternatively, complete a RACI by Responsibility matrix by entering R A C and I in the column headers at the top of the matrix. Under each column, for each task/function enter the role or roles that belong in the column.
   - Determine if multiple roles can be responsible and accountable (it is generally recommended to limit accountability to a single role).

3. Regularly review and adjust.
   - The team's RACI should be assessed and adjusted when new team members are onboarded, when tasks or roles change, and when role conflict is identified.
   - If reviewing the RACI does not resolve the role conflict, consider the team engagement and experience to assess if other role clarity tools and exercises, such as Team Role Discovery or Work Agreements, are more appropriate.

Next Steps
Save your completed RACI matrix to a location accessible by all team members and revisit as needed or when the team situation changes.

Complement your RACI matrix with a Work Agreement.

Role Responsibility Discussion Ice Breaker

Why use the Role Responsibility Discussion Ice Breaker
Role expectations should be discussed to avoid misunderstandings. However, sometimes individuals within a team are uncomfortable bringing up role clarity issues and discussing role responsibilities.

When to use the Role Responsibility Discussion Ice Breaker
Use ice breaker exercises to help a team get comfortable being uncomfortable and better prepared to discuss this complex topic. Ice breaker tools can also aid in deciphering operational and personal work differences that should be included in a Work Agreement discussion.

How to use the Role Responsibility Ice Breaker
1. Create a list of emotional responses the team might feel when talking with others about roles and responsibilities. Examples of emotional responses include Invigorated, Productive and meaningful, Educated and informed, Confrontational, Worthless and a waste of time, Frustrated, etc.
2. Write each emotional response on an individual index card.
3. Hand out the index cards with the emotional responses to the team (or if doing it remotely, assign each person one or more of the emotional responses).
4. Each person takes a turn holding up the card they received, and the rest of the team identifies if they agree or disagree with the listed response as something they feel or believe others feel when talking about roles and responsibilities.
5. Ask / encourage discussion between those who agree or disagree to explain why they feel that way.
6. Once the ice breaker is complete, proceed to team roles and responsibilities discussion.

Alternative Options
Other tools such as personality surveys can help team members understand and adapt better to each other's styles for working together. Team members who know each other's styles of working can better adapt to work more effectively together.

As a team activity, personality surveys, such as "16 Personalities", can be a fun and effective way of improving how teams operate and communicate.

How MAKE can help

Our operational excellence consultants have been in your shoes and have decades of experience navigating role clarity challenges. Our experience and facilitation expertise can help you address role confusion within your organization and support these crucial conversations.

For more information visit our website at makesolutionsinc.com or contact Tamara Pomerantz, VP Client Operations, Tamara.Pomerantz@makesolutionsinc.com.

Appendix A – Example Work Agreement Questions

Work Agreement Questions
Team and individual objectives
What is the purpose, scope, and expected outcome for this team?
What does each member personally and/or professionally want to achieve from their engagement on the team?
Roles and responsibilities
What type of team engagement is the Work Agreement for?
Who are the team stakeholders (audience)? (internal, external or both; executive leadership, middle management, analysts, etc.)
What is the objective for completing the Work Agreement? (better team collaboration, hierarchy leadership organization, addressing specific engagement challenges, etc.)
What task responsibilities apply and don't apply?
What roles make up the engagement and need to participate in the Work Agreement exercise?
If one of the recommended roles is not staffed, who will take ownership of those responsibilities?
Understanding the unique and similar behavioral styles on the team
What work relevant to the team’s purpose do the members enjoy, what plays to their strengths?
What work relevant to the team’s purpose do the members not enjoy doing / find challenging?
Team communication and status reporting
What process will our team use to provide updates to each other?
Do you prefer email, IM, text, phone, or face to face communication?
What process will our team use to provide status updates to our customers and/or leadership?
Who is responsible for managing and addressing performance or professionalism issues?
Established standards and procedure for decisions and key activities
What are the major types of decisions that might arise and who on the team needs to be involved?
What are the key activities that might arise and who on the team needs to be involved?
Risk management, mitigation strategy and escalation process
What should qualify as an escalation / when should an escalation process “kick-in”?
What is the escalation path?
How will we work together to log and monitor risks and issues, and ensure escalations are managed?

Appendix B – RACI templates

RACI Matrix by Role

R = Responsible: who is responsible for completing the work, who is assigned the function, the doer.
A = Accountable: who is accountable for ensuring the task or function is properly completed, who makes the final decision.
C = Consulted: who needs to provide input for the task or function to be properly performed and completed.
I = Informed: whose work depends on this task, who needs to be informed of the results, kept in the loop.
*Use this **example** template as a tool to help build your own RACI* *Update to reflect the appropriate functions/tasks and roles for your team.* *Enter either an **R, A, C** or **I** in each cell for the corresponding role and task/function.*

Project Implementation Task/Function	Exec Sponsor & Steering	Business Owner	Project Manager/ Lead	Vendor	Analyst	Informatic ist	Learning Lead	Testing Coordinat or	SME
Maintain project resource staffing in PPM									
Manage scope									
Support project contract management									
Monitor and report on project financials									
Creation and management of project plan									
Maintain and monitor the project dashboard and timeline									
Run/facilitate weekly team meetings									
Participate in Portfolio review meetings									
Write and submit the weekly status report									
Write and submit the monthly executive status report									
Monitor and manage Risk/Issue mitigation									
Conduct project risk reviews and gateway reviews									
Monitor escalations									
Mange project value metrics & KPI's									
Sign off on project gateways and deliverables									
Update and communicate with stakeholders and governance									

Updates of assigned project tasks									
Submit project change requests									
Approves project change requests									
Submit technical build change control									
Monitor code install needs									
Develop and monitor communication plan									
Develop testing plan									
Manage and facilitate testing process									
Participate in testing									
Identify education needs and policy or procedure changes									
Develop education/learning plan									
Develop education materials									
Manage education delivery (training)									
Provide team recognition									
Capture lessons learned									
Close project									

RACI Matrix by Responsibility

R = Responsible: who is responsible for completing the work, who is assigned the function, the doer.
A = Accountable: who is accountable for ensuring the task or function is properly completed, who makes the final decision.
C = Consulted: who needs to provide input for the task or function to be properly performed and completed.
I = Informed: whose work depends on this task, who needs to be informed of the results, kept in the loop.
Use this example template as a tool to help build your own RACI *Update to reflect the appropriate functions/tasks for your team.* *Enter the appropriate roles in each cell corresponding to the responsibility level and task/function.*

Project Implementation Task/Function	**R**	**A**	**C**	**I**
Maintain project resource staffing in PPM				
Manage scope				
Support project contract management				
Monitor and report on project financials				
Creation and management of project plan				
Maintain and monitor the project dashboard and timeline				
Run/facilitate weekly team meetings				
Participate in Portfolio review meetings				
Write and submit the weekly status report				
Write and submit the monthly executive status report				
Monitor and manage Risk/Issue mitigation				
Conduct project risk reviews and gateway reviews				
Monitor escalations				
Mange project value metrics & KPI's				
Sign off on project gateways and deliverables				
Update and communicate with stakeholders and governance				
Updates of assigned project tasks				

Submit project change requests				
Approves project change requests				
Submit technical build change control				
Monitor code install needs				
Develop and monitor communication plan				
Develop testing plan				
Manage and facilitate testing process				
Participate in testing				
Identify education needs and policy or procedure changes				
Develop education/learning plan				
Develop education materials				
Manage education delivery (training)				
Provide team recognition				
Capture lessons learned				
Close project				