



Seven Steps to Role Clarification

Why Clarify Roles?

Role clarification helps team members perform more effectively. In fact, clarifying roles on a regular basis is essential for a high-performing work team. By setting aside time to give and receive feedback in a positive way, your team members will avoid blow-ups and stress producing chaos. Just follow the steps below.

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.

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

Read • Paraphrase • Ask for Feedback

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 parties document 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 behavior, 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.

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