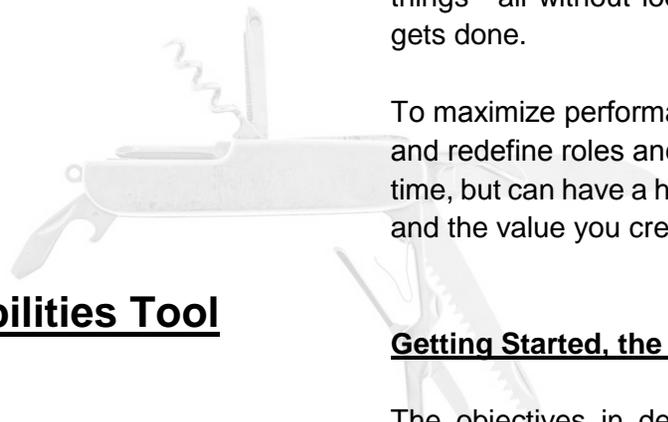




# **Sales Manager Survival Guide**

**Roles and  
Responsibilities Tool**



## **Roles and Responsibilities Tool**

One of the biggest issues in organizational effectiveness is poorly defined roles and responsibilities. It not only impacts our productivity, but effects our relationships and value we bring to our customers.

Poorly defined roles and responsibilities impact the results we produce, our effectiveness, and our performance. Poorly defined roles and responsibilities create confusion both within the organization and for customers. There is always the potential to for things to “fall through the cracks,” because people don’t know who is responsible. Or there are redundant, duplicative efforts, multiple people doing the same thing.

Taking the time to review and redefine roles and responsibilities is critical to focus everyone on those things most critical to their performance.

It’s easy for us to become unfocused. Over time, the business changes, but we don’t update who is responsible for what. We acquire new companies, we re-organize, and we do new things---all without looking at who does the work and how it gets done.

To maximize performance, it’s critical to periodically reassess and redefine roles and responsibilities. It doesn’t take a lot of time, but can have a huge impact on performance, productivity and the value you create for your customers.

### **Getting Started, the Roles and Responsibilities Matrix:**

The objectives in developing the roles and responsibilities matrix are:

- To identify critical activities, processes and other areas necessary to achieve the business unit plan.
- To clearly identify the roles and responsibilities of the organization’s players in executing the processes and activities. Additionally, this should clearly assign accountability within the organization.
- To identify areas in which there may be duplication of effort or those in which there is no accountability assigned.
- To help the organization identify conflicts in role definition, mission and responsibilities.

- To stream-line decision-making and communication within the organization.
- Help the team work together more effectively in accomplishing their mission.
- To help the organization's constituents (other company organizations, vendors, customers, etc.) understand who in the organization is responsible for supporting them.

**Structure and Format of the Responsibility Matrix:**

The vertical axis of the matrix identifies key activities, processes, accountabilities, reports or other items. These can be generated from the responsibilities of the people in various functions, from looking at problems the organization has had, of from questions customers might have. An example of the matrix is displayed below:

	Function 1	Function 2	Function 3
Responsibility Item A.	S	R	
Responsibility Item B.	R	I	S
Responsibility Item C.	S		R

The format of a responsibility is very important in order to establish clarity in the development of the responsibilities matrix. Each responsibility should be clearly worded. As much as possible, responsibilities should be defined as a complete sentence. As examples, responsibility for strategy development and implementation may be split between

functions. In this case, two responsibility items need be defined. Examples of responsibility items include:

- Development of the overall strategy for launching product line X in the U.S. market.
- Development of the sales and distribution strategy for product line X in the U.S. market.
- Sales of product line X in the U.S. market. (or )  
Implementation of the sales strategy in the U.S. market.

In completing the matrix, there can be **only one function responsible** for the item. That function are identified with a “R.” Several functions play roles in supporting the function that has responsibility for the item. These functions may play roles in the decision-making process, may support development or execution or provide other critical support. These functions are identified with a “S.” While there can be many functions in supporting a specific responsibility, there should be some criticism if every function plays a supporting role. If this occurs, it is usually the result of one of the following factors:

- The responsibility item has not been clearly enough. The responsibility item should be re-worded or split into multiple items.
- The function does not have a supporting role, but has an informational need in order to execute their responsibilities. These functions should be identified with an “I.”

An example of a responsibility matrix might be:

	Sales Mgmt.	Product Mgmt.	Sales People
Development of the overall strategy for launching product line X in the U.S. market.	S	R	
Development of the sales and distribution strategy for product line X in the U.S. market.	R	I	S
Sales of product line X in the U.S. market. (or ) Implementation of the sales strategy in the U.S. market.	S		R

**Developing the Matrix:**

In developing the responsibility matrix for the organization, it is most effective to have wide participation of the organization in developing and completing the matrix. In addition to having a more completely defined matrix, resolving differences serves as an excellent team building exercise.

The first step is to develop a “strawman” from which the organization can begin its efforts. Each function should complete the matrix independently; identifying responsibility roles, support roles, and informational roles based on their understanding of the organization, their mission and their jobs.

Additional responsibility items should be identified, if they have been omitted.

The leadership team should then consolidate the separate lists, identifying areas in which there are conflict in identification of the “R” items. These items should be discussed, the responsibility item clarified, and the single function having responsibility should be identified. (This process may merit separate meetings between the disagreeing organizations.) The leadership team members should be actively involved in the process. While members of their organizations may be involved, responsibility for completing the matrix should not be delegated.

Once the leadership team has identified and agreed to all the responsibility items and roles, the matrix should be finalized. Based on the final agreement, the following activities may have to take place:

- Functional mission statements may be refined or re-defined.
- Individual performance plans and expectations may be refined or re-defined.
- Job definitions may be changed.

These actions are important if the roles and responsibilities matrix to become an “actionable” definition of the manner in which the organization’s functions are to work together in accomplishing the organizational mission.

Another important aspect is the establishment of a communications plan. It is important to communicate the roles

and responsibilities within the organization and to its constituents.

Many things should change as a result of making the responsibilities matrix “real.” Decision-making should become faster and clearer. Meetings should become more focused with the responsible function chairing the meeting, driving the agenda and objectives with the support of the other appropriate functions. Duplication of effort and re-work should be minimized and organizational teamwork should be improved.

### **Follow-up steps:**

Once the responsibility matrix has been adopted, it several additional steps might be taken. An important step is for the function responsible for each item to clearly define it, define how its attainment will be measured and to establish goals or targets.

The matrix can be “cascaded” within the various functions of the organization. The various responsibility items can be broken down to more detailed items and assigned to specific people or jobs within the function.

### **Conclusion:**

The responsibility matrix is a powerful tool in helping the organization improve its effectiveness. It can be developed by the organization in a relatively short period of time. The

development may create conflict and disagreement in the organization. It is critical that these disagreements be addressed and resolved as part of the process of developing the matrix. If this is not done, development of the matrix becomes a useless exercise and should be stopped.

Once the process is completed, the teamwork will be stronger. The process of working together in resolving conflicts creates stronger understanding and relationships. Completing the effort will create a team that has a unified view of the critical activities and processes needed for the organization to accomplish its mission and the role of each function in achieving the goals of the organization.

Upon the completion of the matrix, it is critical that the organization implements the role identified. If this is not changed, the process has been a meaningless exercise and will not improve the effectiveness of the organization.

### **About Sales Manager Survival Guide:**

These materials are supplementary materials provided to purchasers of the Sales Manager Survival Guide. For more information and resources, visit [salesmanagersurvivalguide.com](http://salesmanagersurvivalguide.com)

### **About Dave Brock:**

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