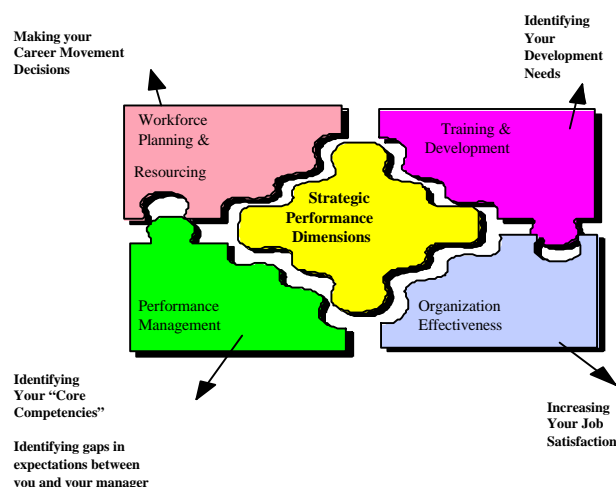




The Role Clarifier

Version 3.0

The Role Clarifier will help with. . .



The Role Clarifier: Introduction

The Role Clarifier is a multi-purpose tool that can be used in identifying the critical skills and tasks for a role, in interviewing situations and for career development. It incorporates both the Performance Dimensions and other factors called “role elements.” The Performance Dimensions (PDs) help you determine the skills and competency levels required for success in a particular role. The “role elements” describe other important factors of the role (such as environment, structure, tasks) that contribute to your motivation, performance, job satisfaction and career considerations. This tool provides a structured process for you to look at thirty typical role elements and understand how they link to your performance and satisfaction on the job.

You will complete the following steps:

1. **Assessment** - Use the “Role Elements Data Sheet” to assess your perception of the role (either as the manager or as the employee in the role/candidate for the role). If you are the employee/candidate, you can also identify the characteristics of your ideal role.
2. **Analysis** – Analyze the data from the “Role Elements Data Sheet,” to determine which role elements are most relevant to the role. Prepare to discuss these (manager and employee).
3. **Discussion** - Meet (manager and employee) to share perceptions of the role, resolve any differences about what the role requires and identify the critical Performance Dimensions for the role. In addition, you can use the information as a catalyst to discuss career movement decisions and determine which role elements and performance dimensions will be critical for future positions.
4. **Action Planning** – Using the *Performance Dimensions Development Map*, identify actions that will enhance your performance and satisfaction on the job (this step applies to the employee in the role/candidate for the role).

Instructions

You will be assessing the thirty Role Elements in terms of three viewpoints:

Column I: The employee's or candidate's view of what the role requires to accomplish deliverables.

Column II: The manager's view of what the role requires to accomplish deliverables.

Column III: The employee's or candidate's preference on how to structure the role.

Each of the Role Elements is described on a scale of 1 to 5 in the left column. A matrix on the last page lists the Performance Dimensions that correspond to each Role Element. This information will be used later when interpreting the results.

Instructions: Circle the number which best describes the Role Element as it relates to each viewpoint. If you are currently in this role or are interviewing for the role, complete columns I and III. If you are the manager of the person in the role, complete column II. **There are no "good" or "bad" answers.** The numbers indicate different views of what you think the role requires or what you would prefer, and the numbers in each column may be the same or quite different. Consolidate all views on your copy of the tool. You should then have one number circled in each column for each Role Element. See the example below:

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
1. Travel			
Half or more of my time at work is spent away from home and office	5	5	5
	4	4	④
Occasionally I spend time away from home and office.	③	3	3
	2	②	2
Little to none of my time is spent traveling.	1	1	1

Even if you do not get all views of the role (manager and employee), you may find your scores interesting and useful. The Role Elements can help identify areas of interest or concern you could not previously "put into words."

Additional situations when you might want to use this tool include:

- 1. As the candidate, when considering a position.** Do this exercise with the hiring manager's and your views of the prospective role. How do your views match? Are you a "good fit" for the role?
- 2. As the manager, when considering an applicant.** Complete the exercise, identifying what you need from the role. Ask an applicant to complete the tool in terms of how they see (and would prefer) the role to be. Then compare views. Is this a "good fit?"

Role Elements Data Sheet

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Name: _____

Date: _____

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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1. Travel

Half or more of my time at work is spent away from home and office.	5	5	5
	4	4	4
Occasionally I spend time away from home and office.	3	3	3
	2	2	2
Little to none of my time is spent traveling.	1	1	1

2. Hours of work

I have flexible hours; I set my own based on the work that needs to be done.	5	5	5
	4	4	4
I have some flexibility in setting my work schedule.	3	3	3
	2	2	2
I have fixed hours and no flexibility in setting my work schedule.	1	1	1

3. Interact with people in positions senior to me (higher complexity/level)

I often interact with people senior to me to complete my deliverables.	5	5	5
	4	4	4
I occasionally interact with people senior to me to complete my deliverables.	3	3	3
	2	2	2
I rarely interact with people senior to me to complete my deliverables.	1	1	1

4. Working on teams

I often have to work on teams to complete my deliverables.	5	5	5
	4	4	4
I occasionally have to work on teams to complete my deliverables.	3	3	3
	2	2	2
I rarely am required to work on a team.	1	1	1

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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5. Virtual team/Remote location from team members/manager

I am based at a different location than my team members & manager.	5	5	5
	4	4	4
I sometimes work from a different location than my team members & manager.	3	3	3
	2	2	2
I am based at the same location as my team members & manager.	1	1	1

6. Technology

I am constantly required to keep up-to-date with new technology in my field.	5	5	5
	4	4	4
I am occasionally required to deal with new technology in my field.	3	3	3
	2	2	2
I am rarely required to deal with new technology in my field.	1	1	1

7. Degree of specialization (technical/professional)

The skill set required for this role is very specialized/rare.	5	5	5
	4	4	4
The skill set required for this role is somewhat specialized.	3	3	3
	2	2	2
The skill set required for this role is broad-based.	1	1	1

8. Interaction with the organization

I interact with many different parts of the organization.	5	5	5
	4	4	4
I interact with a few parts of the organization.	3	3	3
	2	2	2
I interact with a fairly defined group of people within my own area.	1	1	1

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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9. Structure

My tasks are highly structured and clearly defined within a process.	5	5	5
My tasks are moderately structured ; I have some flexibility in how/when to get things done.	4	4	4
My tasks are slightly structured ; I choose how and when to get things done.	3	3	3
	2	2	2
	1	1	1

10. Freedom of decision

I have complete responsibility for decisions required by or affecting my work.	5	5	5
	4	4	4
I have some responsibility for decisions required by or affecting my work.	3	3	3
	2	2	2
Others make important decisions for me using my input/advice.	1	1	1

11. Influence

I often have to persuade others to a different point of view to get things done.	5	5	5
	4	4	4
I occasionally have to persuade others to a different point of view to get things done.	3	3	3
	2	2	2
I rarely am required to persuade others.	1	1	1

12. Creativity

I often have to come up with new ideas and develop those of others to complete my deliverables.	5	5	5
	4	4	4
I occasionally have to come up with new ideas and develop those of others to complete my deliverables.	3	3	3
	2	2	2
My role requires little or no creativity.	1	1	1

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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13. New things/changes

I am often required to deal with new things/changes in my environment.	5	5	5
I am occasionally required to deal with new things/changes in my environment.	4	4	4
I am rarely required to deal with new things/changes in my environment.	3	3	3
	2	2	2
	1	1	1

14. Multiple work locations

I am based at several locations.	5	5	5
	4	4	4
I am based at a couple of locations.	3	3	3
	2	2	2
I am based at only one location.	1	1	1

15. Complexity

The role is highly complex and involves working with intricate, interrelated detailed and specialized processes.	5	5	5
	4	4	4
The role is moderately complex with some straightforward processes.	3	3	3
	2	2	2
The role is straightforward and process-based.	1	1	1

16. Decision making

I frequently have to make decisions of significant importance.	5	5	5
	4	4	4
I occasionally have to make decisions of significant importance.	3	3	3
	2	2	2
I rarely have to make decisions of significant importance.	1	1	1

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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17. Simultaneous tasks

I focus on many tasks at a time.	5	5	5
	4	4	4
I focus on a few tasks at a time.	3	3	3
	2	2	2
I focus on only one main task at a time.	1	1	1

18. Project planning & managing

I am often required to plan or manage projects.	5	5	5
	4	4	4
I am occasionally required to plan or manage projects.	3	3	3
	2	2	2
I am not required to plan or manage projects.	1	1	1

19. Pressure & timelines

I must often deal with timelines and pressure for results.	5	5	5
	4	4	4
I occasionally deal with timelines and pressure for results.	3	3	3
	2	2	2
I rarely have timelines or feel pressure for results.	1	1	1

20. Cross-functional activity

I often work cross-functionally to complete my deliverables.	5	5	5
	4	4	4
I occasionally work cross-functionally to complete my deliverables.	3	3	3
	2	2	2
I work only within my own function.	1	1	1

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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21. Working with diverse people

I often work with people who are different from me.	5	5	5
	4	4	4
I sometimes work with people who are different from me.	3	3	3
	2	2	2
I work only with people who are similar to me.	1	1	1

22. Working in diverse cultures/environments

I often work in or with cultures/ environments different from my own.	5	5	5
	4	4	4
I occasionally work in or with cultures/environments different from my own.	3	3	3
	2	2	2
I rarely work in cultures/ environments different from my own.	1	1	1

23. Strategic impact

My role's output has a strategic impact across the organization.	5	5	5
	4	4	4
My role's output has some strategic impact across the organization.	3	3	3
	2	2	2
My role is tactical and impacts only team/departmental deliverables.	1	1	1

24. Managing others

I am responsible for managing the work of others.	5	5	5
	4	4	4
I have some people management responsibilities.	3	3	3
	2	2	2
I do not have management or team leader responsibilities.	1	1	1

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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25. Contact with external suppliers & vendors

I have frequent contact with external suppliers/vendors to complete my deliverables.	5	5	5
	4	4	4
I have occasional contact with external suppliers/vendors to complete my deliverables.	3	3	3
	2	2	2
I have no contact with external suppliers/vendors.	1	1	1

26. Budget responsibility

I have total responsibility for a budget.	5	5	5
	4	4	4
I have some responsibility for a budget.	3	3	3
	2	2	2
I do not have responsibility for a budget.	1	1	1

27. Interface with the end customer

I have frequent contact with the external customer to complete my deliverables.	5	5	5
	4	4	4
I have occasional contact with the external customer to complete my deliverables.	3	3	3
	2	2	2
I have no contact with the external customer.	1	1	1

28. Organizational impact

My actions have a far reaching impact on the organization.	5	5	5
	4	4	4
My actions have a moderate impact on the organization.	3	3	3
	2	2	2
My actions have a confined impact on the organization.	1	1	1

Role Element	Column I Your view of the role	Column II Manager's view of the role	Column III Your role preference
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29. Developing/coaching others

Developing and coaching others is a frequent and critical part of my role.	5	5	5
	4	4	4
Developing and coaching others is an occasional part of my role.	3	3	3
	2	2	2
Developing and coaching others is not part of my role.	1	1	1

30. New problems/opportunities

I frequently encounter new problems and opportunities.	5	5	5
	4	4	4
I occasionally encounter new problems and opportunities.	3	3	3
	2	2	2
I rarely encounter new problems and opportunities.	1	1	1

Role Elements: Analysis & Discussion

You are now ready to compare the three viewpoints you used in the Role Elements Data Sheet. The analysis of this data will help you identify potential areas for change to enable you to improve performance, enhance job satisfaction, and/or make career movement decisions.

The worksheet below is to be used in two phases: Analysis and Discussion.

Analysis Phase

During this phase, you will review your Role Elements Data Sheet and identify the areas of significance. The worksheet below provides instructions on how to analyze your data and a place to record your significant Role Elements along with questions, comments, or ideas about each one.

Discussion Phase

During this phase, meet with your manager to review the results, gain clarification, and discuss ideas that both of you have for enhancing job satisfaction, improving performance, and/or making career movement decisions. In the "Notes" section you can record questions, ideas, and thoughts from the discussion. Below each Role Element identification box are suggestions for how to interpret the results and thoughts for discussion.

1. Identify the "Areas of Agreement"

Compare columns I-III for each Role Element. List below those Role Elements with close scores (0-1 point difference).

Agreement between Your View (Col. I) and Manager's View (Col. II)	This is an area where you have a common understanding of what the role requires. Elements here may be "core competencies" for the role.
Role Element(s)	Notes

Suggestions for discussion

It is for you (employee and manager) to discuss each Role Element to ensure you both interpret the Element in the same way. If you agree that certain elements are key to success in the role (for example you both mark Item 29, "Developing/Coaching Others," as a "5"), then this indicates that the associated Performance Dimension (see matrix on last page) may be a "Core Competence" for the role. If you are the employee in the role, you may want to raise or bolster your skill/mastery level of the Performance Dimension(s) for that Element.

Agreement between Your View (Col. I) and Your Preference (Col. III)	These are elements that are most likely contributing to your current job satisfaction.
Role Element(s)	Notes

Suggestions for discussion

Getting clear about which Role Elements are current satisfiers in your job is important. You may want to share these with your manager so that he/she knows to keep those elements in the role or tries to look for opportunities/projects that will enhance these areas. These Role Element are also ones you will want to consider as you look for new assignments or positions within the company.

2. Identify the Significant “Gaps”

Compare columns I-III for each Role Element. List below those Role Elements where there are the largest differences in scores (2-4 point difference).

Gap between Your View (Col. I) and Manager’s View (Col. II)	This is an area where you and your manager have a different perception of what is required to meet the deliverables of the role.
Role Element(s)	Notes

Suggestions for discussion

If Self Score is greater than Manager’s: Determine why this gap is here. If your discussion reveals that the Element is not as significant as you thought, ensure that you do not expend more time and energy in this area than you need. Establish exactly what your manager requires and expects in this area.

If Manager’s Score is greater than Self: Determine why this gap is here. If your discussion reveals that this Element is more significant than you thought, establish exactly what your manager expects so that you can target your efforts. See the “Role Elements: Action Plan” on how to take developmental action.

Gap between Your View (Col. I) and Your Preference (Col. III)	This is an area where there are opportunities to enhance your satisfaction with the role.
Role Element(s)	Notes

Suggestions for discussion

If Your View is Higher than Your Preference: This Element may be an area of dissatisfaction in your role. First, discuss your view with your manager to see if he/she agrees on the importance of this Element. Discuss this with you manager to see if there are ways that you can do the job differently. Make sure that you understand your manager's expectations and, if required, identify development activities for the skills associated with this Element. Be aware that the tasks associated with this Element may be less interesting and important to you than other Elements that you enjoy or prefer.

If Your View is Lower than Your Preference: This Element may represent an area in which you feel unchallenged in your role. Discuss this with you manager to see if there are ways that you can do the job differently that would make use of your interest in this Role Element. Ensure that you understand your manager's expectations, and address any development need in this area. You may also find that developing your skills in this area will be more enjoyable (and possibly faster) than developing areas in which you have low preference.

Gap between Manager's View (Col. I) and Your Preference (Col. II)	This is an area where you may be unchallenged or have lower motivation for meeting the expectation of your manager.
Role Element(s)	Notes

Suggestions for discussion

If Manager's View is Higher than Your Preference: This Element may be an area where you will find it difficult to satisfy the expectations of your manager because of low interest/motivation by this type of work or environment. Make sure that you understand your manager's expectations and take any development action required if your skills related to this area are not at the appropriate level. Be aware that the work associated with this Element may be harder and less satisfying for you.

If Manager's View is Lower than Your Preference: This Element is likely to be an area in which you feel unchallenged or possibly unrewarded in your job. Discuss this with you manager to see if there are ways that the job can be done differently to make use of your interest in this Role Element. Ensure that you understand your manager's expectations and needs, and don't expend unnecessary time and effort on this Element if it is not required. You may find that developing your skills in this area will be more enjoyable (and possibly faster) than areas in which you have low preference - but make sure that your role requires these skills and that you don't develop the skills you like at the expense of the skills you need.

Action Plan

Select 1 to 3 Role Elements to include in your action/development plan. Consider the following goals as you consider which Role Elements to select:

- **Improve Performance** - You may select Role Elements that you and your manager agree are important to success in your role. As mentioned, those elements may be a “Core Competence” in your role. You might also select a Role Element where there is a gap between your and your manager’s ratings in order to increase your level of mastery.
- **Enhance Job Satisfaction** - You may want to select a Role Element where there is a gap between your preference and either your or your manager’s perception of your role. Here is a chance to communicate what factors would bring your current reality closer to your ideal.
- **Make Career Movement Decisions** - Perhaps you are in a position to consider career movement within the organization. You might identify Role Elements and correspond-ing Performance Dimensions that will be important to develop for your next position.

Instructions:

1. List the Role Elements you selected in the matrix below.
2. Refer to the “Role Elements/Performance Dimensions Matrix” on the last page and review the corresponding Performance Dimension associated with each Role Element. For each of the Role Elements you selected, choose the Performance Dimension which seems most relevant to your role (think about the required deliverables). Record these Performance Dimension(s) in the matrix below.
3. Using the *Performance Dimensions Development Map*, identify and record your current and required mastery level for each PD, and, if appropriate, agree to development activities with your manager. You may wish to document these development activities as part of the *Priorities* process. [Note: you may order or download a copy of the *Development Map* from <http://Learn/PD> or <http://47.132.128.238/PD/default.html>
4. Make a list of the activities and deliverables which describe the way that you will use each Role Element in the next 3-6 months. For example, one deliverable associated with the “Technology” element would be: “Cross-train with Javier on XXX feature so that I can complete software upgrades for release 10 in Q4.” This will give you a detailed idea of exactly how the Role Element relates to your deliverables and will help you identify development needs and activities.

Role Element(s)	Performance Dimension (PD)	Current PD level	Required PD level	Activities/objectives for this Role Element in the next 3-6 months

Role Elements/Performance Dimensions Matrix

Role Element		Performance Dimensions	
1	Travel	Change Management/Adaptability	Initiative
2	Hours of work	Organizing Work/Project Management	Personal Drive
3	Interface with people senior to me	Organizational Awareness Self Confidence	Business Acumen
4	Working on teams	Team Leadership Listening & Responding	Working with Others Building Trust
5	Virtual team/ remote location	Personal Drive Organizational Awareness Building Trust	Self Confidence Initiative
6	Technology	Technical/Professional Expertise	Customer Orientation
7	Specialization	Technical/Professional Expertise Applied Creativity	Customer Orientation
8	Interaction with organization	Organizational Awareness	Relationship Building
9	Structure	Change Management/Adaptability Listening & Responding	Initiative
10	Freedom of decision	Organizing Work/Project Management Personal Drive	Decisiveness Initiative
11	Influence	Directing Work Through Others Visiting	Influence Working with Others
12	Creativity	Applied Creativity	Self Confidence
13	Newness of things	Directing Work Through Others	Change Management/ Adaptability
14	Multiple work locations	Organizing Work/Project Management	Personal Drive
15	Complexity	Analysis	Judgment
16	Decision making	Decisiveness	Building Trust
17	Simultaneous tasks	Change Management/Adaptability	Initiative
18	Project planning & managing	Organizing Work/Project Management Visioning	Developing Others Team Leadership
19	Pressure & timelines	Personal Drive	Self Confidence
20	Cross functional activity	Working with Others Organizational Awareness Developing Others	Team Leadership Relationship Building
21	Working w/ diverse people	Listening & Responding	
22	Working in diverse cultures	Change Management/Adaptability	Listening & Responding
23	Strategic Impact	Organizing Work/Project Management Team Leadership	Visioning
24	Managing others	Directing Work Through Others Relationship Building	Influence
25	Contact w/ external suppliers & vendors	Technical/Professional Expertise Analysis	Judgment Decisiveness
26	Budget responsibility	Analysis Business Acumen	Judgment
27	Interface with end customer	Customer Orientation Technical/Professional Expertise	Listening & Responding
28	Organizational impact	Judgment	Business Acumen
29	Developing/coaching others	Developing Others Directing Work Through Others	Listening & Responding
30	New problems/ opportunities	Applied Creativity Technical/Professional Expertise	Visioning