BLACK GLASS

Mission- and Role-Based Team Workshop

The following is a workshop-based methodology for designing a team around a Mission and the Roles that are necessary to achieve the mission. **Necessary technology:** Multi-player spreadsheet tool, like Google Sheets, Airtable, or similar.

<table>
<thead>
<tr><th>Timing</th><th>Activity</th><th>Notes</th></tr>
</thead>
<tbody>
<tr>
<td>Pre-work for the leader</td>
<td>Get clear on the team's mission</td>
<td>For the team in question, write a short (Tweet-length or shorter) statement that describes the team's mission. Some helpful prompts to consider.

Given the department's overall purpose, what outcomes is this team accountable for? If we are successful, what will happen? What outcomes are we trying to achieve? How does the work support the broader mission of the organization? How are we measured, and how does this team contribute to those measures?

Share this mission with the team, either in a meeting to explain the mission, or in an email with an invite to the next steps.</td>
</tr>
<tr>
<td>Pre-work for the team</td>
<td>Capture the work to be done</td>
<td>In a shared spreadsheet (ideally Google Docs), work as a team to capture all the work that is necessary for the team to achieve their mission. Try to break down the work to a task level. As an example, "Scheduling flights for vendor assessment" is better than "Travel," and "Selecting which content gets presented to execs" is better than "Exec decks." Useful prompts:

What do we do to serve our customers? What work is required to guide other teams or direct reports? What goes into our team's partnership with other firms? How do we surface data to leadership?

As the leader, review the work of the team in advance to be prepped for the workshop.</td>
</tr>
<tr>
<td>15-30min</td>
<td>Group the work into roles</td>
<td>1. In the spreadsheet, work as a team to "tag" each row with a descriptive handle.
2. For the tagging, consider using categories like Customer Type, Functional Category, or Required Expertise.
3. Use the tags to sort the list into clusters.
4. Describe the clusters with broader terms than before, like "Finance Guide" or "Strategy Adviser."
5. The resulting set of named clusters are your roles.</td>
</tr>
<tr>
<td>15-30min</td>
<td>Add meaningful detail to the roles</td>
<td>1. Use the rows in the spreadsheet as a starter set of responsibilities.
2. Re-write each row into a common format: be sure they all start with a verb.
3. Add any missing work that aligns with the role, using the same format (verb-first).
4. Flag any responsibility that starts with "Decide" or "Work with ___ to". These are indicators of decision rights and dependencies.
5. Review and reflect: "Are these the roles, and the work, necessary for us to achieve our mission? Why or why not?"</td>
</tr>
<tr>
<td>10-15min</td>
<td>Assign people to roles</td>
<td>Add a new column, and as the leader of the team, assign individuals to the roles. Check to see that each individual understands their work.</td>
</tr>
</tbody>
</table>