

Unlocking Untapped Potential with Role Analysis

A Leader's Guide for Clarifying Responsibilities,
Skills and Organizational Needs



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Introduction

Today, as industries evolve and automation advances, everyone's role is shifting. To keep employees moving forward, organizations need to ensure that their job responsibilities are current, unique and aligned with their strategy. One way to accomplish this is by conducting a role analysis — a structured review of a role's responsibilities, required skills and alignment with organizational goals.

When done well, a role analysis helps companies:

- Optimize productivity by removing low-value work and clarifying responsibilities
- Identify where automation or new skills can drive efficiencies
- Surface hidden talent and leadership potential within existing teams
- Retain top performers by ensuring they stay engaged as roles shift
- Prepare for upcoming retirements and strengthen succession pipelines
- Remain resilient and adaptable in the face of change

1 Why You Need Role Analysis

2 When to Conduct a Role Analysis

3 Steps to Conduct a Role Analysis

4 Best Practices

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Section 1

Why You Need Role Analysis

I. Efficiency & Productivity

Role analysis helps teams identify low-value or redundant tasks and streamline workflows. It highlights where automation, AI or technology partnerships could make the greatest impact, especially in roles or processes that currently cause inefficiency or "pain points."

2. Engagement & Retention

When job responsibilities drift or become unclear, employees disengage. Role analysis clarifies expectations, eliminates ambiguity and ensures people spend more time on meaningful work, driving engagement, satisfaction and ultimately, retention.

3. Future-Proofing

Work is changing fast. Role analysis highlights emerging skills, tasks that can be automated and areas where new capabilities are needed to stay competitive. It helps teams redeploy talent strategically rather than reactively.

4. Equity & Inclusion

By systematically reviewing responsibilities, organizations can uncover "invisible work" often carried out disproportionately by underrepresented groups, such as mentoring, emotional labour or DEI committee work, and ensure recognition and workload balance.



5. Succession Planning & Retirements

With retirements accelerating, many organizations risk losing key institutional knowledge. Role analysis provides a roadmap for identifying critical jobs, single-point dependencies and internal talent ready to grow. It supports structured succession planning rather than relying on last-minute replacements.

5. Organizational Design

Role analysis fits into the bigger picture of organizational design. By systematically reviewing roles, organizations can ensure every role fits logically within the structure (supporting strategy, avoiding duplication and clarifying central vs. decentralized ownership).

Section 2

When to Conduct a Role Analysis

Role analysis works best as an ongoing business practice, not a one-off exercise. Roles evolve quickly as priorities shift, new technologies emerge and employees take on new responsibilities. Regular reviews ensure your workforce structure keeps pace with these changes, rather than reacting once issues surface.

Regular Cadence (Every 12–18 Months)

Treat role analysis like budgeting or strategic planning, a regular check-in that:

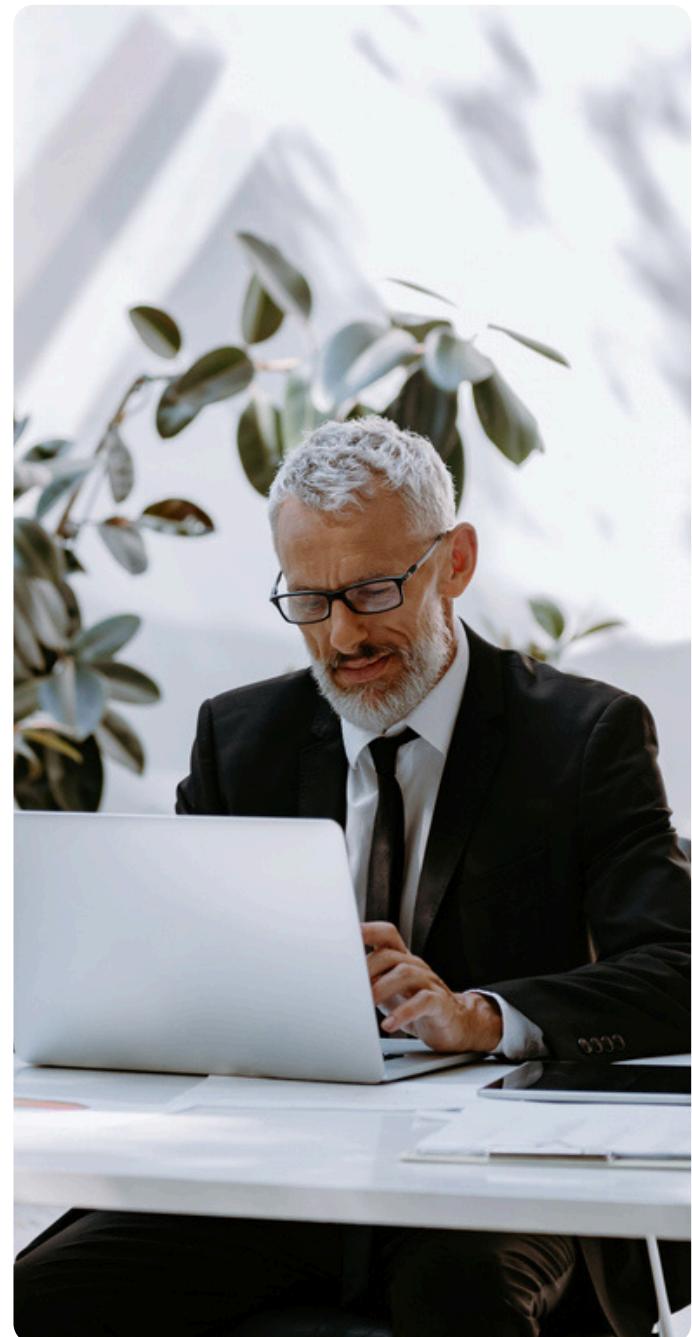
- Keeps job expectations accurate
- Surfaces low-value tasks that have crept in
- Identifies new skills or technologies needed
- Aligns responsibilities with current business priorities

This proactive approach prevents job descriptions from going stale and ensures roles continue to deliver value.

Key Trigger Points

In addition to regular cycles, role analysis is especially valuable at key moments of change, such as:

- **Restructuring or Leadership Changes** – Clarifies new expectations and eliminates gaps or overlaps
- **Performance or Engagement Dips** – Uncovers misalignments between the role's design and current reality
- **Before Hiring or Promoting** – Ensures you hire for the role you need now and in the future, not a legacy version
- **New Technology or Automation** – Redesigns roles intentionally to leverage new tools and free up capacity
- **Regulatory Changes or New Functions** – Keeps responsibilities compliant and up-to-date
- **Anticipated Retirements** – Identifies knowledge at risk and supports succession planning
- **Mergers, Acquisitions or Reorgs** – Harmonizes roles and clarifies ownership



Section 3

Steps to Run a Role Analysis

A well-structured role analysis follows a clear process. Whether you're reviewing a single role or conducting a broader departmental audit, these seven steps help you gather the right information, engage stakeholders thoughtfully and translate insights into tangible improvements.

Step 1

Define the Scope

Before you begin, decide whether you're analyzing a single role, an entire team, a department or the whole organization. Start with the most high-impact roles: those that are business-critical, tend to have high turnover or are likely to be affected by upcoming retirements or technology shifts.

Tip for Leaders

When engaging leaders in this process, frame the conversation around the seat, not the person. The goal is to understand the role at 80–100% capacity (its intended purpose, core responsibilities and strategic value) rather than evaluating individual performance.



Step 2

Gather Data

Collect both quantitative and qualitative information to build a clear picture of the role:

- **Existing Documentation:** Current job descriptions, KPIs, performance metrics, organizational charts
- **Feedback:** Self-assessments, manager evaluations and stakeholder input
- **Workflow Analysis:** Data on where time is actually spent, what tasks take the longest, where bottlenecks occur and what responsibilities may have expanded or shifted over time

This groundwork ensures you enter interviews with context and a fact-based understanding of the role.

Step 3

Conduct Role Interviews

Interviews are the heart of role analysis. They reveal how work is truly getting done and surface hidden strengths, inefficiencies and opportunities. How you frame these conversations matters. See the Role Audit Template in Section 5.



Set the Context First:

Employees may worry that “role analysis” is tied to performance reviews or job cuts, so it’s essential to clarify the purpose upfront:

- The goal is to update and clarify roles, ensuring they stay aligned with the company’s evolving strategy
- This is not a performance review: it’s about understanding the role, not evaluating the person
- Their input will directly shape career pathing, training and workload balance, not job reductions
- The conversation is an opportunity to spotlight their impact and highlight skills or responsibilities that may be underused

Who to Speak With & What to Ask:

Employees:

- What do you actually do day-to-day?
- Which responsibilities energize you? Which feel outdated or misaligned?
- What skills or experiences do you have that aren’t fully utilized?
- Where are the most significant pain points or inefficiencies in your work?

Managers:

- Where do you see gaps, redundancies or untapped potential in this role?
- Which responsibilities have shifted informally over time?
- Are there opportunities for automation or redistribution to improve impact?

Peers/Stakeholders:

- What’s working well in how this role interfaces with yours?
- Where are there dependencies, overlaps or unclear ownership?
- How could this role evolve to better support shared goals?

Approaching interviews this way builds trust and surfaces insights that rarely appear in job descriptions or performance data.

Step 4

Map Responsibilities vs. Impact

Once you've gathered input, evaluate how each responsibility contributes to organizational goals. For each task, ask:

- Is it core, strategic or administrative?
- Does it directly support business outcomes?
- Could it be automated, delegated or eliminated?
- Is it "invisible work" (e.g., mentoring, DEI committee work, emotional labour) that should be recognized and factored into the role?

This mapping helps identify where time is being spent vs. where value is being created.



Step 5

Identify Gaps & Opportunities

Use your mapping to pinpoint:

- Underutilized skills that could add value if better leveraged
- Leadership potential: employees already mentoring, influencing others or leading informally
- Succession risks: knowledge or responsibilities concentrated in one person, especially ahead of retirements
- Process gaps where responsibilities are unclear or duplicated

These insights lay the foundation for redesigning roles to be more strategic and future-ready.

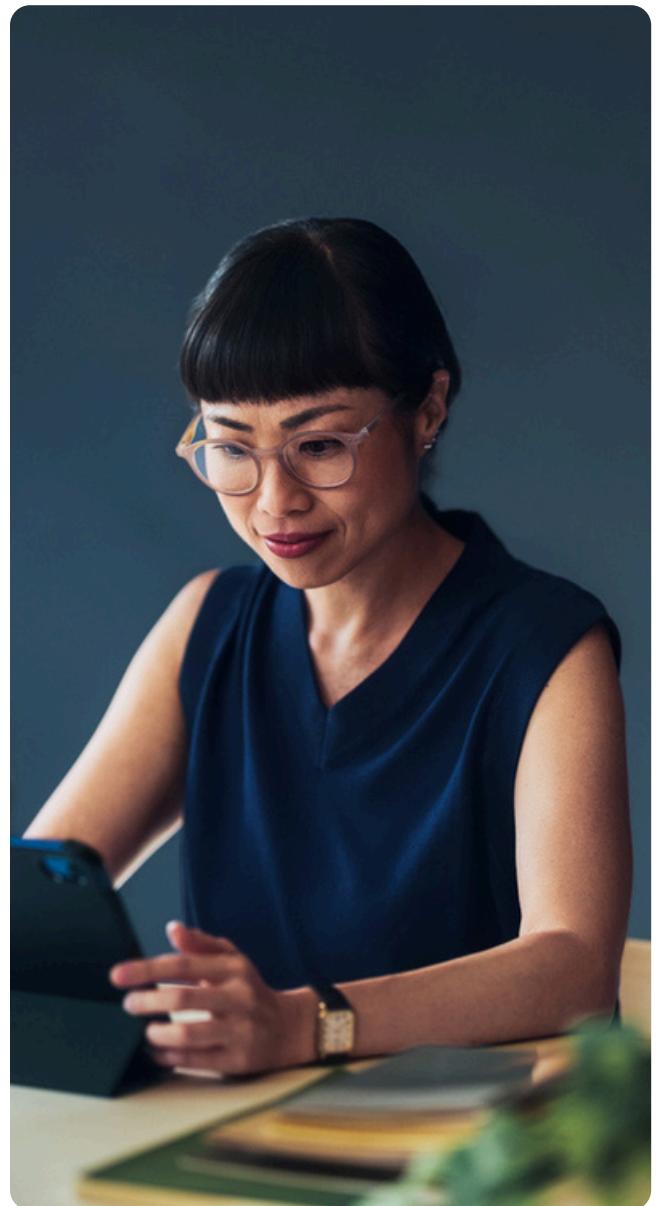


Step 6

Redesign & Realign

With a clear understanding of the current state, redesign the role for maximum impact:

- Update role descriptions to reflect reality and future needs
- Redistribute responsibilities to balance workload and eliminate redundancies
- Partner with technology teams to automate where possible and free up capacity
- Create stretch opportunities for high-potential employees as part of succession planning
- Build development pathways for emerging skills and future leadership transitions



Step 7

Document & Communicate

Finally, communicate clearly and transparently:

- Share updated role expectations with employees
- Highlight opportunities identified through the process, such as growth areas or workload improvements
- Explain why changes are happening and how they support both organizational strategy and individual growth
- Document key takeaways and set a timeline for follow-up to ensure changes are implemented

Pitfalls to Avoid

- Treating succession planning as reactive
- Assuming “someone will step up” without documented pathways
- Overlooking quiet high-performers who may not self-promote
- Slipping into performance conversations rather than role conversations
- Conducting the analysis without follow-through or communication



Section 4

Best Practices

To make role analysis meaningful, not just a paperwork exercise, embed it into your regular rhythms and follow through with action.

I. Make It Part of Annual Planning

Treat role analysis like budgeting or strategy planning. Build it into your annual or 18-month cycle so reviews happen consistently, not just in reaction to problems.

Example: Schedule role analysis for critical roles each fall alongside budgeting.

2. Pair with Succession Planning

Include a succession lens in every review to identify single-point dependencies and future leaders, especially ahead of retirements.

Example: If a senior manager is two years from retirement, map their unique responsibilities and identify who could be developed to step in.

3. Involve Technology Early

Some of the biggest gains come from identifying tasks that can be automated. Bring IT/Tech in early to flag opportunities.

Example: If reports take 20% of someone's time, automate dashboards to free capacity for strategic work.

4. Be Transparent with Employees

Set clear expectations upfront. Position role analysis as a career clarity and development exercise, not a performance review.

Example: Send a short memo explaining the purpose, timeline and how input will shape training and workload balance.

5. Follow Through on Insights

The fastest way to lose trust is to collect feedback and do nothing with it. Implement quick wins, communicate changes and build a timeline for larger shifts.

Example: If a gap in data literacy is uncovered, launch training within three months rather than waiting for next year's cycle.

6. Start Small, Then Scale

Begin with a handful of high-impact roles, refine your approach, then expand. Consistency matters more than scale.

Example: Pilot in one business unit this year and roll out company-wide next year with a standard template.

Section 5

Role Audit Template

Instructions: Use this template to review each role on your team. Aim to capture both what's written in the role description and what actually happens day-to-day. Involve the employee, their manager and key stakeholders.

Part 1: Role Snapshot

- Role Title: _____
- Department/Team: _____
- Employee Name (if applicable): _____
- Date of Audit: _____
- Audited by: _____

Part 2: Role Purpose & Alignment

Ahead of Time:

- Draft a short summary of the role's stated purpose and strategic contribution (from role description or workforce plans).

During Conversation, Ask:

- How would you describe the main purpose of your role in your own words?

- How does your work contribute to team or company goals?

- Are there parts of the role that feel outdated, unclear or misaligned?

Part 3: Key Responsibilities

Ahead of Time:

- List responsibilities from the official role description.

During Conversation, Ask:

- What are your core day-to-day tasks?

- Are there responsibilities you've taken on over time that aren't documented?

- Are there tasks listed in the role description that you no longer do?

After:

Note mismatches between written responsibilities and reality. Highlight new or shifted tasks that should be captured.

Part 4: Time & Task Breakdown

During Conversation:

Work with the employee to estimate:

- The % of time spent on each responsibility:

- Relative impact (High / Medium / Low):

- Tasks that could be automated, delegated or removed:

After:

Transfer responses into the table below to visualize where time is going vs. where value is created.

Example table:

Responsibility	% Time	Impact	Automate/Delegate?	Notes
Preparing weekly reports	20%	Medium	Could be automated	<i>Manual data entry is time-consuming</i>

Part 5: Skills & Strengths

During Conversation, Ask:

- What skills are essential for success in this role today?
- What new skills or tools do you think will become more important in the next 1–3 years?
- Do you have any skills or experiences (e.g., languages, certifications, leadership) that aren't currently being fully used?

After:

Summarize skill gaps and opportunities for development.

Part 6: Gaps & Risks

Ahead of Time:

- Review dependencies or known single points of failure using org charts or project documentation.

During Conversation, Ask:

- If you were away for a month, what responsibilities would be hard for others to cover?

- Are there tasks that only you know how to do?

- What would be lost if you retired or left tomorrow?

After:

Document key risks and where knowledge transfer or documentation is needed.

Part 7: Succession Planning Lens

Ahead of Time:

- Review potential internal successors or upcoming retirements where relevant.

During Conversation, Ask:

- Who might be able to step into your role in the future?

- What skills or experience would they need to be ready?

- Are there upcoming changes that might affect succession?

After:

Record succession considerations, development needs or external hiring gaps.

Part 8: Opportunities & Recommendations

(Complete this section after synthesizing data from the conversation.)

- Tasks to remove (low-value, outdated):

- Tasks to redistribute (balance workload):

- Skills to develop (training, mentoring, stretch projects):

- Career pathway potential (next step for this role/employee):

Part 9: Action Plan

Action	Owner	Timeline	Success Measure
<i>Enroll employee in leadership training</i>	<i>HR</i>	<i>Q3</i>	<i>Employee leads next project independently</i>

Part 10: Follow-Up

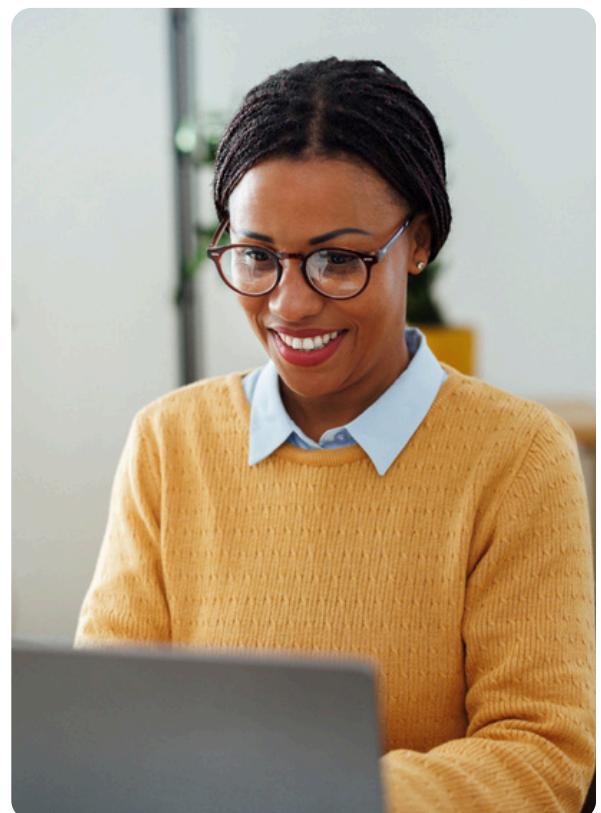
- Schedule the next review (recommended every 12–18 months)
- Note any agreed upon follow-up items or checkpoints to track progress

Pro Tip

If time is tight, you can pre-fill Parts 1–3, focus the conversation on Parts 4–7 and complete Parts 8–10 afterward. That structure typically results in a 45–60-minute conversation per role audit.

Conclusion

A well-executed role analysis turns insights into action. It gives leaders a clear view of how work is actually happening, highlights where roles can evolve and provides a roadmap for making strategic, people-focused decisions. By embedding this practice into regular planning cycles, organizations move from reacting to workforce changes to shaping their future intentionally — with clearer roles and a stronger, more resilient team.





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Questions about the role analysis process?
Contact our team today.

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