



# STRUCTURE YOUR BUSINESS FOR SUCCESS: ALIGN TEAM ROLES AND ACCOUNTABILITIES



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## CONCEPT IN SHORT

The purpose of this paper is to explain in some detail the ROA Process we use with our clients to help them structure their business to align roles, establish accountability, and drive performance and productivity in their business.

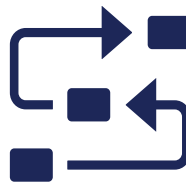


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## CONCEPT AT WORK



### INTENTION

At The Covenant Group, we utilize the ROA Process to build structure and create role clarity for yourself and others on your team. Clarifying each person's areas of responsibility and the objectives attached to each will help to establish accountability. Your understanding of the daily, weekly, and monthly activities that need to occur to fulfill your objectives will help you as you move through this process with your team.

### PROCESS

Role clarity is central to the success of your business. You and your team require clear responsibilities, objectives, and activities to drive results and create a system of accountability that will ensure success and sustainability over the long term. Implementing the ROA Process will create better alignment across your team and help people better understand what is expected of them.

### MEASUREMENT

Focus on building the right structure to create a supportive organization that will maximize your earning capacity and create job fulfillment for yourself and others on your team. With the ROA Process in place, you can more effectively manage and measure performance against the objectives you set out for each area of responsibility.



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## EMPLOY LEVERAGE

**There are two foundational principles of entrepreneurship: 1) Optimization 2) Leverage.**

Successful entrepreneurs optimize. By that, we mean they focus on working at the highest level of their capability. In order to work at the highest level of your capability, you have to focus on what you do best and delegate the rest. Leverage requires you to work with and through other people and effectively utilize resources. In order to do so, you have to learn the art and science of delegation. It starts with being very clear about the role you want to play in your business. Then, you have to determine what work you are going to assign or delegate to others. As you grow your business, you will move from assigning tasks to delegating functions.

At The Covenant Group, we utilize the ROA Process with our clients to build structure and clarify the role of yourself and others on a team. In our terminology, ROA stands for **Responsibilities** i.e. those areas of your work for which you are accountable, **Objectives** i.e. specific, measurable results within a stated timeframe, and **Activities** i.e. the action steps required to achieve your objectives.



As you know, ROA also stands for Return on Assets. In this case, the assets consist of the Human Capital in your business and the degree to which you can maximize the return on people. Human Capital is the sum of the time, energy, creativity, and intelligence of the people who work in your business. Structural Capital is the ability to embed what is learned from the application of Human Capital in to the bricks and mortar – the knowledge base – of your business. The ROA Process is part of maximizing the Human Capital in your business and building the Structural Capital of your business. It is the documentation of the knowledge, skills, responsibilities, and objectives of those on your team. The decisions you make around your people will directly contribute to your progress and help you to achieve your desired results.

Focusing on and building the right structure will create a supportive organization that will maximize your earning capacity and create job fulfillment for you and each member of your team. Very few entrepreneurs build the organization they need, and the result is that they do too much work that they do not enjoy or that does not require their level of capability and, ultimately, they are distracted from the work they do best. The money they save by not hiring a support staff is gained expensively.

To succeed, you need to develop and organize your business – the structure, systems, and the skills you and those around you possess – and align it with your strategy. The right structure allows the entrepreneur to do the work most appropriate for them to do, and to delegate the rest.



***The ROA Process creates better understanding of a role and how that role aligns with the rest of the team.***



## CREATE ALIGNMENT AND ACCOUNTABILITY

**The ROA process starts at the top of an organization with the principal(s) and management team.**

The principal(s) needs to decide and articulate their own role and the responsibilities and objectives they wish to establish for themselves and which ones they will oversee and delegate to others. From there, other roles are determined. The way the principal will complete their ROA will be very different from an employee.

Everyone else in the organization works to identify how they can best support their leader and manager(s) by aligning and identifying the responsibilities they are accountable for, the objectives that pertain to them, and the activities that will help them to fulfill the objectives. There is a difference between the way in which an entrepreneur or principal or someone compensated based on results will complete an ROA versus an employee.



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## RESPONSIBILITIES

Your Key Responsibilities = Functions



Sales



Marketing



Service



Administration



Financial Management



Business Strategy



Leadership



Human Capital Management

Entrepreneurship assumes that the person in that role gets paid for results. Their ROA would reflect objectives that are results based. For example, to achieve X amount of revenue in X timeframe through X product or service.

Employees, on the other hand, are paid for their effectiveness in their role. It is a manager's job to hold employees accountable for their areas of responsibility (be it marketing, service, accounting, sales support, etc.) and the objectives they set out to achieve.

As a leader, you want to encourage and empower your employees to take on full functions. A key management mistake entrepreneur's face is delegating tasks when they should be delegating functions. Delegating tasks means that you have to be accountable for all areas of responsibility in the business. Delegating a function, such



as marketing or service, allows you to shift accountability for the objectives of that function to a member of your team. You may be a key resource in fulfilling the objectives, but it is not on you to manage the daily tasks associated with fulfilling the objectives of that function. That accountability shifts to your team member who is empowered to take the initiative in their area of responsibility within the parameters you both set, keeping in mind the values that drive the business.

The ROA process helps you to clarify the objectives and identify the tasks or activities that are associated with each function so that it is clear to the individual in that role what they are accountable for. As the leader, your job will be to act as a resource to your team, provide guidance, and mentor where necessary. To further create alignment and accountability, it is important to institute regular meetings for everyone to share progress on their own areas of responsibility.

DEFINING YOUR ROLE		
Focus on whether or not:		
		You are capable of fulfilling the responsibility in the most effective and efficient way.
		Completing the activities associated with the objective is the best use of your time.
		You find the responsibility intellectually challenging.
		You will enjoy achieving the objective.





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An objective should be SMART. By SMART, we mean 1) Specific 2) Measurable 3) Attainable 4) Realistic and 5) Time-based. It should identify how much, of what, by when. You must consider the outputs or objectives you wish and are required to achieve within your role. The rest of your team, with your help, will need to do the same.

OBJECTIVES				
				
<b>SPECIFIC</b>	<b>MEASURABLE</b>	<b>ATTAINABLE</b>	<b>REALISTIC</b>	<b>TIME-BASED</b>
Exactly what do we want to accomplish?	Is information available to evaluate results?	Are the objectives realistic and reasonable, given time, talent, and resources?	What is the significance of achieving the objectives?	How much time is allowed to achieve the objectives?

Activities deal with the steps and processes that contribute to the fulfillment of the objectives – what you’re going to do, when you’re going to do it, where you are going to do it, how, and with whom.

This offers a very detailed accounting of the activities that need to be taken to be effective in a role.

As you work to complete your own ROA, you will have to beware of vague language. For example, if you were to identify an objective to be “Host a variety of client events” it would be important to reflect on whether this objective is SMART. How many events do you want to host and over what timeframe? Do you want the events to be educational or entertainment oriented? Will they be open to all clients or a select group? The level of detail is very important to make sure you are accountable to the objectives and activities you put down on paper. What often happens is people forget to include activities that they are so used to doing and which seem obvious to them. Encourage yourself and members of your team to be as detailed as they can as they build out their ROA.

Structural Capital is essential in building a sustainable business.



***The ROA is an iterative process that will evolve with the growth of your business. You will need to make adjustments to your objectives and the activities over time, especially if you add new members to your team.***

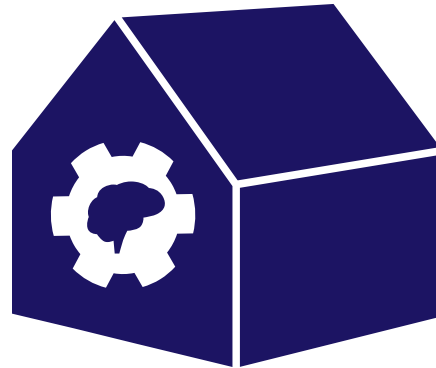


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## BUILDING STRUCTURAL CAPITAL



**Consider the following questions and whether any uncertainty arises as you answer:**

- *Is it clear to you and your team what areas of work you are each held accountable for?*
- *For each accountability or responsibility, can each team member articulate clear objectives?*
- *Are you delegating daily or weekly tasks to your employees, instead of full functions they can report on at weekly meetings?*
- *If a member of your team left, are you confident that you have a detailed understanding of their daily, weekly, and monthly activities?*
- *If you were replacing one of your team members, would you be able to provide a new hire with a detailed document highlighting their responsibilities, the objectives, and the activities necessary to drive the results you expect from their role?*








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The ROA will help you build Structural Capital inside your organization and have a clear picture of all the activities – big and small – each person considers as part of their role. Members of your team may move on and when we take the ROA process and marry it with the job description, what we have are two very powerful tools to increase knowledge transfer, effectiveness in understanding the role, and where it fits in the overall business or organization.

Many times when a new employee starts a job, they usually will have the job description and maybe an employee manual. But then what? The employee doesn't actually know what to do next to be productive. The ROA creates better understanding of a role and how that role aligns with the rest of the team, tells people where to go when they have questions, and helps to easily identify activities that can be delegated to others.

ROA			
Responsibilities	Objectives		Activities
Function		S – Specific	What?
		M – Measurable	When?
		A – Attainable	Where?
		R – Realistic	How Much?
		T – Time-based	with Who?

*Please do not hesitate to email us for a copy of the ROA template  
[tcg@covenantgroup.com](mailto:tcg@covenantgroup.com)*



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We recommend that each team member complete the first draft of their ROA on their own and then share it, first with their manager, and then with the whole team to refine it and establish accountability across the team.

Your understanding of the daily, weekly, and monthly activities that need to occur to build the vision for your business will help you as you move through this process with your team.

A very important component to the ROA Process is considering how you can be proactive in your role, as opposed to reactive. You and members of your team should be focused on tasks that are important, but not urgent.

## SUMMARY

**As we stated earlier, the ROA provides you with a framework for applying the art and science of delegation.**



The ROA Process will help you gain more control over what you are doing and it will help you become clear about what each person in your business is accountable for, starting with you. As you start to build out the ROAs for you and each member of your team, remember to consider and clarify what you need to know about the person, your company, each role, the expectations, and how you will align the whole team to meet the objectives you seek to achieve.

Your people are instrumental in developing, changing, and utilizing the resources you require to build your business. You want to be sure they understand their responsibilities and the overall objectives of the business. Pairing structure, alignment, and accountability with your vision, mission, and top priorities will put you on the road to success.

# WE HOPE THIS WHITE PAPER IS OF VALUE TO YOU & YOUR BUSINESS!

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***The Covenant Group is in the business of redefining performance.***

We provide passionate entrepreneurs and executives with the tools to grow market share and increase productivity. We are international thought leaders and have helped thousands achieve success.

## **We Create Outcomes**

Our programs are designed to help our clients:

- **Develop** and implement a strategy to build a business that is right for them;
- **Implement** a marketing system to attract the right clients;
- **Create** more sales to clients and prospective clients;
- **Generate** new leads; and
- **Build** an organization to create more free time and professional satisfaction.

To learn more, please feel free to contact us:

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or visit our website [www.covenantgroup.com](http://www.covenantgroup.com)