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| **POSITION:**  **\_\_\_\_\_\_\_\_\_\_\_\_** | **1.**  **2.** |  | 1.  2. |  |

TIPS ON USING THIS FORM:

1. Setting roles, goals, expectations and metrics is a process. Each step in the process builds on the step just before it. In filling this out, start by brainstorming 5-7 roles for the position. Use emotive words to come up with the roles, and realize you can always come back and change them – but take your best shot and defining their primary roles.
2. Once roles are defined, then put in writing 2-3 goals associated with EACH role. Be specific, but leave the metrics for later. Once again, use emotive phrases that clearly define an OUTCOME for that role.
3. As you capture goals, expectations will also come out. Expectations are not goals, as much as they are unwritten rules to succeed in this position. In other words, an expectation will describe more “how” a role is fulfilled, while a role zeros in more on “what” success in the role looks like.
4. Finally, with Roles, Goals, and Expectations set…that last question to detail is: What are the key measurements that capture success in this position? What can be measured that reflects success in achieving the goals established? There may be 2-3 key measurements, or as many as 5-7. Do not go above 7, however. That becomes far too difficult to track, and indicates either the position is too broad, or the metrics need to be refined and consolidated.

Allow the process to work for itself. Don’t take short cuts with it. Go step by step…and then see what comes of it. When done well, this allows a leader to see his or her people in a new light – and becomes a powerful tool for expectation setting, delegation, and accountability.

Remember to not do this without feedback from the person in the role. Arrive at the final roles, goals, expectations and metrics together, and then use this as a basis for the one on one coaching you will do going forward.

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