

Role-Fit Matrix

QUICK LOOK

A tool to help you and your team regularly reflect on and adapt roles and responsibilities.

Summary

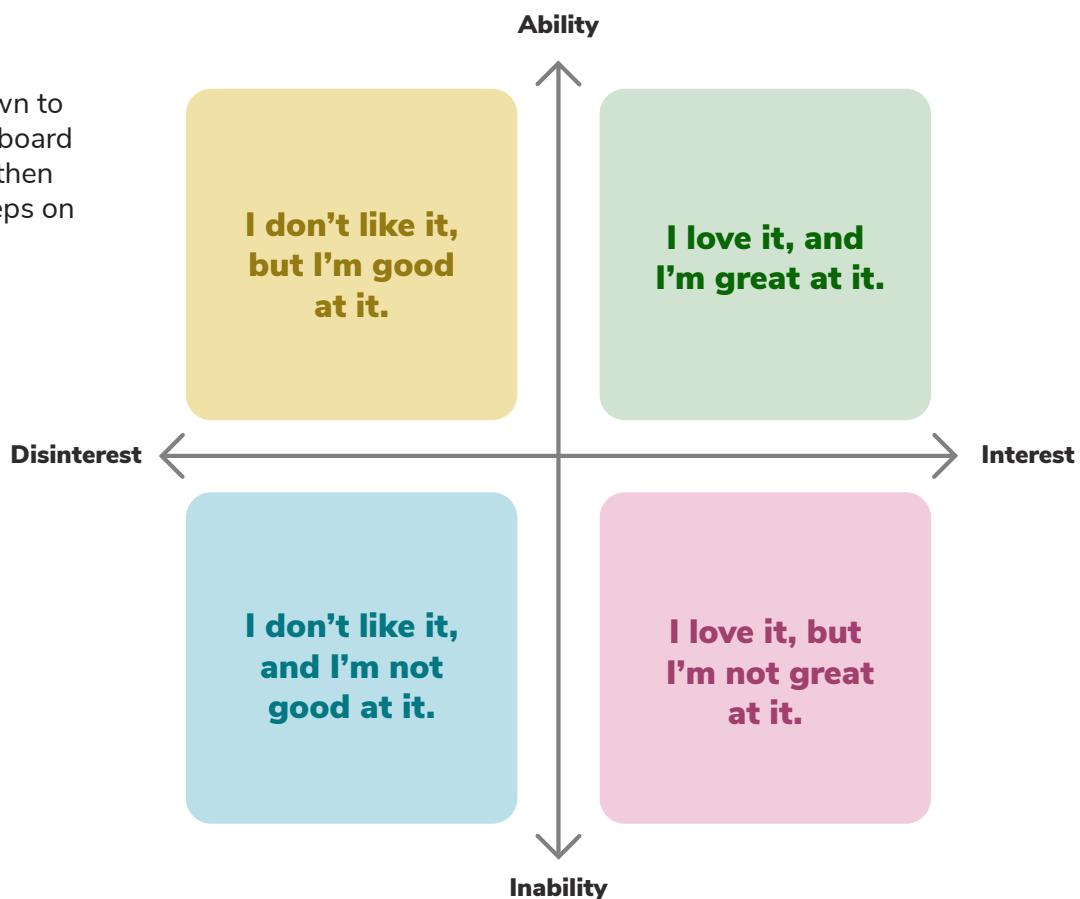
Lack of role clarity is an issue in almost every struggling team. Teams not only need to be clear on what hats each person is wearing, they must also make changes to ensure their work aligns with their strengths and interests.

The Role-Fit Matrix creates space to identify the roles that exist on your team and talk openly about where change is needed. It will affirm where people are experiencing a good fit with their strengths, as well as highlight where they may be struggling or stuck in the wrong role.

This tool is designed to be used in a group setting, but it works equally well in a one-on-one meeting.

Key Actions

Start by drawing the Role-Fit Matrix (shown to the right) on a whiteboard or poster paper and then work through the steps on the following page.





01 | Individual reflection

Hand out different coloured sticky notes to each person and invite them to write out all the roles that they play on the team (keep it to one role per sticky note).



02 | Categorization

Ask each person to group their notes according to the four categories in the matrix. They are organized on two axes, based on how much interest you have in a role and how much ability you believe you have to execute that role.



03 | Group sharing

Take turns sharing what you've written down and place the sticky notes on the matrix.



04 | Reaction round

Invite people to share what they're noticing and what might be surprising.



05 | Analyze and adjust

What could be adjusted so that each person is able to spend more time on the work that is most meaningful to them? Potential adjustments could include:

- **Swap:** What one person dislikes, another may enjoy.
- **Rotate:** If roles are unenjoyable but need to be done, consider rotating the responsibility.
- **Improve:** Is there a process change or some other tweak that could improve the experience for the role holder?
- **Eliminate:** If it's the wrong fit for everyone, consider if it still needs to happen.



Tips

- Include your own roles as a manager. You're a member of the team and everyone also needs to be clear on what you do.
- Once the roles have been identified, find a way to visually map them out so they're easier to see and adjust in the future. Online whiteboards or simple project management tools give you the ability to lay out roles by name and easily edit them as needed.

