

ROLE ASSIGNMENT CHART

Ensure your operational processes run optimally with the right staff in the right roles. Identify overlap and overload, and make sure everyone is aware of their operational responsibilities. Use a Responsibility Matrix or a R.A.C.I Chart

Major Process	Responsible Completes the task	Accountable Delegates & approves	Consulted Provides input	Informed Inform progress	Time to Complete
Example: <i>Prospecting</i>	<i>Kirsten</i>	<i>Nicole</i>	<i>Stephanie</i>	<i>John</i>	<i>92 minutes</i>
Prepare	<i>Kirsten</i>	<i>Nicole</i>	<i>Nicole</i>	<i>John</i>	<i>47 minutes</i>
Conduct	<i>Shauna</i>	<i>Stephanie</i>	<i>John</i>	<i>John</i>	<i>35 minutes</i>
Follow-up	<i>Kirsten</i>	<i>Stephanie</i>	<i>Nicole</i>	<i>John</i>	<i>10 minutes</i>
Client Meeting					
Prepare					
Conduct					
Follow-up					
Client Service Request					
Prepare					
Conduct					
Follow-up					
Onboarding					
Prepare					
Conduct					
Follow-up					
Other Processes (Choose from List)					
Prepare					
Conduct					
Follow-up					

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Other Processes (cont.)					
[Choose from List]					
Prepare					
Conduct					
Follow-up					
[Choose from List]					
Prepare					
Conduct					
Follow-up					
[Choose from List]					
Prepare					
Conduct					
Follow-up					
[Choose from List]					
Prepare					
Conduct					
Follow-up					
[Choose from List]					
Prepare					
Conduct					
Follow-up					