READY-TO-USE TEMPLATE

Agree the Role and the Boundaries

A role clarity agreement covering purpose, decisions, relationships, support, and boundaries.

40 minutes | Role clarity agreement

Use the supplied wording as it is, or change it together. The Word file and Notion template are editable. Keep only notes you need.

Purpose · What is this role here to contribute?

Write this together, in terms a colleague can understand.

This role helps [people] achieve [useful difference] by [main contribution]. We will know the role is useful through [examples and evidence], not just how busy the person appears.

Responsibilities · What is included?

Use a small set of meaningful responsibilities.

Own:
Contribute to:
Advise on:
Not responsible for:
Work that is currently assumed but not agreed:

Notes and changes for our situation

Agree the Role and the Boundaries

WORKING AGENDA / CONTINUED

Authority · Which decisions belong here?

Name decisions, not vague levels of empowerment.

Can decide independently:
Must consult before deciding:
Needs another person's approval:
Who resolves an unclear boundary:
How we will communicate decisions:

Relationships · Where does the work meet others?

Check this section with the adjacent roles.

Partner role / team:
What we need from each other:
Handoff or shared decision:
How we will raise a mismatch:
What we still need to agree:

Notes and changes for our situation

Agree the Role and the Boundaries

WORKING AGENDA / CONTINUED

Conditions · What makes the role possible?

Include capacity and access, not only capability.

Time and capacity assumptions:
Information and tools needed:
Support and learning opportunities:
Conflicting expectations to resolve:
Manager commitments:

Review · Keep the role alive

Changes in the work should be able to change the agreement.

We will review this on [date], or earlier if [trigger]. We will ask: What is clear? What is being done without recognition or authority? Which boundary creates avoidable friction? What should change, and who will communicate it?

The thinking behind it

A role is a contribution within relationships and conditions. Clarity should make judgment possible without making a person smaller than their job description.

Read When Mattering Isn't Enough by Nic Payne

Keep the useful part

A shared record, not a transcript. Agree what belongs here and what should stay private.

Date / people / purpose

What we agreed

Next step / owner / support / date

What remains open

When we will return to it

Where have we assigned responsibility without the authority or support to carry it?