

DATE

POSITION TITLE: (e.g. President)

PURPOSE OF POSITION:

The “Purpose” of a position is the primary reason the position exists.

For Example:

Coordinate all functional areas of the company to ensure happy customers, happy employees and happy stakeholders.)

MAJOR ROLES & RESPONSIBILITIES, and percentage of time:

“Major roles and responsibilities” are 4-7 primary areas that an individual is responsible for that encompass more than 5% of that individual’s time, on average over the course of the year.

Examples include:

1. Develop, implement, and monitor progress toward the annual plan – 10%
2. Lead the executive team in meeting plan goals and objectives – 10%
3. Identify, train, and train leaders for the functional areas of the organization – 25%

CONDITIONS OF SATISFACTION for each Role

“Conditions of satisfaction” are measures of how you can tell you’ve successfully met your responsibilities.

Examples for role #1 above might include:

- a. The plan is completed by December 1st.
- b. The plan includes complete monthly budgets, by product line or facility.
- c. The leadership team reviews progress toward plan at least monthly and is adjusting activities appropriately.

TASKS

“Tasks” are the specific actions you take to meet the conditions of satisfaction.

Example tasks for condition of satisfaction “c” above might include:

- Schedule monthly team meetings to review progress on plan.
- Facilitate monthly planning meeting.
- Send out AGENDA 48 hours in advance of plan review meeting.
- Identify a monthly scribe to complete ACTION-DECISION REGISTER.