

Checklist: redefine roles

- Assess skills:** Identify the unique skills and competencies that you need to build a scalable and efficient team today. Start with each of your current processes and identify the key skills needed to take ownership. Include hard skills, such as understanding the nitty gritty of the applicable GAAP, and soft skills, such as translating complex accounting issues for operational teams to understand. Don't worry about what your team can do today – start with what you need.
- Define roles:** Clearly define the major tasks or responsibilities you need going forward to be successful in growing alongside your business and align the skills needed for each. Once again, keep your focus on what needs to be done, not what can be done with your team today.
- Identify must-haves:** For each of your future-focused must-have tasks and/or responsibilities, identify critical skills and map them to your existing team. If you have more than one person capable of a skill, or someone with many skills, map all the possibilities so that you can make trade-offs and get people into the roles where they're most likely to excel. If you wind up with people that don't have a corresponding role, or roles without corresponding people, identify a course of action to address that gap. It could be hiring, training, or process changes so that you have a plan to cover all the necessary skills.

- Match roles to people:** Starting with any one to one relationships, build out jobs that align the needs of the business to adapt and the skills of your team. Once all the major tasks are mapped out, review each person to see if they're under- or overutilized, and address the most extreme cases by moving tasks around to best balance the load.
- Provide skills training:** Equip your team for their new roles and identify key backups. Put together a plan to train them, too.
- Communicate changes clearly and openly:** Be receptive to feedback and questions. Keep your communication direct and as simple as possible, in the channel your audience prefers. Let people know what you're working on ahead of time and ask for their input. This lets people know their opinion is important. Keep people informed of key decisions and why you made them. It's not enough to just communicate what is happening. People want to know the why, the when, and the how to alleviate their concerns.
- Provide ongoing support:** Remember that it takes a little time for changes to settle in and you may need to encourage folks as they navigate through the frustrations that new roles and processes bring. Encourage your team to ask for help early. Be sure to check in, especially during those busy days when things can get sideways quickly.

- Monitor performance for positive impact:** Most of us are willing to adapt to change but feel good when our progress is seen. Be sure to provide encouragement and recognition on what is going well, alongside support when there is a miss.
- Remain flexible and open to further adjustments:** Processes should never become so embedded that they cannot adapt to better methods, tools, or business changes. Keep your eyes on the output, not the process itself. Even tight internal controls can change, as long as the result is achieved in an observable and auditable fashion.
- Consider future growth and roles evolution:** share your ideas with the team on how you can all grow, learn new techniques and become better business partners everyday.