

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.

NAME & DEFINE ADVISOR SERVICING TEAM (1 PER SHEET)					
e.g. John Advisory Team; individual(s), ops team 1, CSA, junior advisor, etc.					
USE A RESPONSIBILITY MATRIX OR A “R.A.C.I.” CHART					
Major Processes	Responsible Completes the task	Accountable Delegates and approves	Consulted Provides input	Informed Inform on progress	Time to complete
Example: <i>Prospecting</i>	<i>Kirsten</i>	<i>Nicole</i>	<i>Stephanie</i>	<i>John</i>	<i>92 mins</i>
Prepare	<i>Kirsten</i>	<i>Nicole</i>	<i>Nicole</i>	<i>John</i>	<i>47 mins</i>
Conduct	<i>Shauna</i>	<i>Stephanie</i>	<i>John</i>	<i>John</i>	<i>35 mins</i>
Follow-up	<i>Kirsten</i>	<i>Stephanie</i>	<i>Nicole</i>	<i>John</i>	<i>10 mins</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					



Role Assignment Chart.

Other Processes (cont.)	Responsible	Accountable	Consulted	Informed	Time to Complete
Prepare					
Conduct					
Follow-up					
Prepare					
Conduct					
Follow-up					
Prepare					
Conduct					
Follow-up					
Prepare					
Conduct					
Follow-up					
Prepare					
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Follow-up					
Prepare					
Conduct					
Follow-up					

