Developing a Role's Key Accountabilities: Laying a Foundation for Performance, Satisfaction and Results

Different managers have different methods of communicating expectations and delivering employee performance appraisals. At some point in your business career, you have likely been on the receiving end of both effective and ineffective performance appraisals. You have also probably experienced frustrating situations where you weren't sure what you were supposed to be working on or had conflicting priorities. The main reason we've experienced these frustrating times in the past has been due to the lack of a solid foundation for the job. In other words, were the true goals of the position identified? Was the performance criterion really necessary or accurate for the position?

Here is an interesting idea for most managers. The delivery of "best-in-class" performance for any position is predicated on how well the job's critical accountabilities have been identified. To do this requires taking a close look at what is really important. When someone says they are responsible for doing 'X', the key accountability is discovered by asking "why" they are doing 'X' using a cascading investigative approach. In the end, when you have identified the position's accountabilities, then you have accomplished the first step in laying a solid foundation for performance.

A position's accountabilities are not the same as a job description. They are instead a succinct summary of critical goals and key successes the position is held accountable to produce for the business. Accountabilities define the reasons why the position is necessary in the first place. They lay the groundwork for defining the supporting behaviors, motivators, skills, capacities and cultural rewards that will support successful achievement of the position's accountabilities.

The position's key accountabilities are defined through a facilitated process in which participants who are familiar with the position explore, validate and quantify its "reason for being." Those involved in the process can be chosen from incumbents, employees who formerly held the position, the manager and/or a former manager of the position, and key managers/staff who interact closely with the position on a regular basis. Ideally, three (3) but not more than ten people with current actual working knowledge of the position should be involved. At every step of the process, it is important for each participant to focus on the simple objective: defining a short list of key accountabilities for the position. When complete, the resulting list of accountabilities typically numbers from 3-7 in total.

Accountabilities vary considerably depending on the job, the industry, company, culture and management. Every set of key accountabilities must contain, wherever possible, targets to achieve for successful performance. These targets should be measurable wherever possible to leave no question as to when success has been achieved. Each accountability should also be prioritized and weighted to reflect which is most important to the position. This becomes useful information if you plan to complete a job profile to identify the required competencies for performing in the job. Review the examples provided on the following pages to get a better understanding of different jobs' key accountabilities:

EXAMPLES OF KEY ACCOUNTABILITIES

DIRECTOR, ORACLE HR IMPLEMENTATION

1. Provide strong leadership and project management skills to the Oracle HR project

2. Ensure executive management and stakeholders are kept informed of critical-path progress and variances from plan (20%)

   a. Keep appropriate executive management and governance committees informed of project status, goal attainment and issues

   b. Serve as liaison to business unit advisory council

   c. Ensure all stakeholders and users receive frequent and appropriate communications

   d. Oversee and monitor all phases of the project schedule

   e. Monitor performance of project team

3. Respond proactively to potential delays in a manner that reduces or eliminates the risk of delay (10%)

4. Ensure all stakeholders and users receive timely, appropriate and effective training (20%

5. Ensure new processes are simplified to leverage Oracle configurations and any new HR process cycle times are reduced ((30%)

6. Ensure all service provider expenditures are approved by the governance committee and services delivered in a manner that meets Cendant's needs (20%)

PHARMACY CUSTOMER CARE REP

1. Provide a patient advocacy approach with every customer contact (patient, doctor, pharmacist, patient caregiver) so that the customer recognizes you as an active liaison between the patient, the doctor and the pharmacy and as a provider of helpful information.

   a. 30% importance to job

   b. Measured by: Call monitoring scores, customer feedback

2. Provide accurate and timely follow-through on all call tasks and commitments and ensure that communications are clear, proper action is taken and all internal processes are followed.

   a. 30% importance to job

   b. Measured by: Call monitoring scores, customer feedback, internal audit

3. Manage to a high level of productivity while maintaining quality and providing an empathetic and supportive experience to the patient by controlling the patient

conversation, learning and applying effective and efficient strategies and processes and multi-tasking while conversing.

    a.   40% importance to job

    b. Measured by: Call monitoring scores, customer feedback, internal audit

NATIONAL SALES MANAGER

1. Increase total annual corporate sales by a minimum of 15% (40%)

2. Consistently achieve a minimum of 3% monthly regional sales increases (30%)

4. Demonstrate sales leadership, measured by favorable staff feedback (15%)

5. Recruit, retain and develop top sales talent while maintaining an average annual employee turnover rate of less than 10% (15%)

OPERATIONS MANAGER

1. Assure reliable operational systems 24x5 with 99% availability (30%)

2. Administer the operations budget to no more than 100% of allotted funds (25%)

3. Establish and maintain quality vendor services within allotted budget (15%)

4. Proactively recommend and implement quality enhancements to operational systems, measured by a continued decrease in time, manpower and costs needed to process client orders and product shipping (15%)

5. Demonstrate leadership in managing operations staff, measured by favorable staff feedback (15%)

ENTERPRISE HRTS STRATEGIC ANALYST

1. Proactively and comprehensively follow through on client and stakeholder needs analysis and business process design research with limited direction. Utilize project management tools and skills to organize and manage tasks and timelines in a manner that ensures timely completion of research.

2. Manage client and stakeholder interactions in a manner that ensures timely completion of research assignments while building a collaborative environment for stakeholder change.
   - Ensure all stakeholders are identified and included in communications
   - Develop or provide direction for developing communication plans on large scope assignments
   - Utilize a communication plan to ensure all clients and stakeholders receive adequate communication throughout the life of the work assignment

3. Compile detailed information about transformation opportunities. Create documentation and make "best alternative" recommendations through analysis.

- o Facilitate group brainstorming to drive client/stakeholder interactions and conversation.

- o Apply critical thinking to produce alternative ideas and solutions

- o Produce basic financial cost/benefit analysis

- o Identify and recommend alternative solutions by convincingly building and presenting case to senior management

FLEET VEHICLE MAINTENANCE SPECIALIST

1. Efficiently and effectively resolve drivers' vehicle service issues by actively supporting both the drivers and the network suppliers to reach a satisfactory solution.

   - Take calls from drivers, clients, and supplier network repair facilities

   - Work as part of the team with the driver, client, and network supplier

   - Minimize costs for the client while maintaining concern for safety issues

2. Maintain and apply the technical and mechanical knowledge necessary to evaluate and validate repair recommendations and therefore ensure that PHH and the driver's interests are served appropriately
   - Add to and maintain ASE certifications

   - Engage in continuous learning via external/internal courses, videos and other resources

   - Regularly review and remain current with Manufacturer's Technical Service Bulletins.

3. Keep productivity high and proactively manage the supplier and driver relationship
   - Control conversations

   - Learn and apply effective, efficient strategies and processes

   - Multi-task while conversing (talk, listen, type, negotiate, and recommend appropriate actions).

   - Follow through in a timely manner as necessary on all call tasks and commitments to ensure service was performed correctly and at a fair and reasonable cost.

4. Ensure that communication and documentation is clear, proper action is taken based on client business rules and all internal processes are followed.
   - Use layman's terms when communicating with drivers

   - Use appropriate technical/mechanical terms when communicating with repair shops

   - Apply prior automotive industry knowledge to resolve driver's situations and to forecast and recommend appropriate course of action.

Measures of Success

The following criteria measure the success of the position of VM Specialist is measured by:

- Accurate recommendation and consultation focused on cost savings as measured by documented cost savings, report card, supervisor/case management staff observation.

- Achieve 100 % of call metrics and market standards 60 Second or less ASA, with 5 % or less abandon % per hour

- Absenteeism, Compliance to work schedules.

Conclusion

Key accountabilities are the bedrock for performance. Attempting to duplicate someone else's list of accountabilities rarely generates satisfactory results. It is best to start from scratch in establishing accountabilities and not assume that one predefined set will suit your company's unique requirements in a given job. The process of defining a position's accountabilities provides value to the organization by focusing management and incumbent attention on assuring that the organization's key success factors are supported by the key accountabilities of the position, which in turn assures maximum return on investment for the organization.

The most effective strategy for the successful performance of a set of key accountabilities is to identify the critical soft skills or competencies required to accomplish the accountabilities. By translating key accountabilities into competencies, we can then match a person's natural talents to the required talents, focus development in the gap areas and leverage the talents that match to the job.

After developing the key accountabilities, the next logical steps in laying the foundation for effective performance involves defining further dimensions of the position, including behaviors, motivators, skills, attributes and cultural rewards. These dimensions make up the competencies required to succeed in the job. Refer to the TriMetrix System Multi-Respondent Job Report to collect and validate each of these dimensions.

Key Accountabilities Exercise

Job Title: _____

Key Accountability #1: _____

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Key Accountability #2: _____

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Key Accountability #3: _____

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Key Accountability #4: _____

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Key Accountability #5: _____

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Key Accountability #6: _____

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Key Accountability #7: _____

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