



Name: _____

Roles & Objectives Clarification

It will be very beneficial if you fill out the A & C questions before our session.

Answer the questions as quickly as possible. Don't agonize, spell check or over analyze. The A's shouldn't take more than 15 minutes. Call me if you want to discuss or elaborate but don't take more time than is needed. Just do it ASAP. E-Mail back to faust@echelonmanagement.com and print a copy for yourself.

A1. My professional skill strengths as they apply to my being a part of this team are:

A2. My professional skill weaknesses as they apply to my being a part of this team are:

A3. The strengths of my personality that affect my roles in this team are:

A4. The weaknesses of my personality that drag on the effectiveness of my roles on this team are:

A5. The activities I most want to be doing on a regular basis for this team are:

A6. The work activities I least want to be doing on a regular basis, yet might be normally required from me in my position on this team are:

A7. The definition of my Role and responsibilities on this team is:

A8. The changes I would like to see in my Role and responsibilities on this team would be, or what I would like to see my new Role and Responsibilities become in the very near future would be:



B2. The vision for our organization (a grand long term goal of our team):

B3. Our organization's Mission is (what we do and how we benefit our customers):

B4. Our values (how we will work with each other and customers and the priority of those values)

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.



C1. Our top 3 goals as a team:

1.

2.

3.

C2. My top 3 goals / contributions within the organization:

1.

2.

3.

C3. The most important measurable actions or performance standards we need to be aware of that will determine our reaching the above team goals (critical success factors)

C4. The most important Action Steps that I want to be personally accountable for in helping to reach our goals listed above.

C5. Other items that may be helpful to discuss in our session...