CREATING AN ACCOUNTABILITY CHART

speakerflow.com

INTRODUCTION

The Accountability Chart is an essential tool for any business, without question.

For you, this will let you visualize the various roles and responsibilities that your business has to fulfill.

It's important to note that though the Accountability Chart is primarily created to hold you and your team accountable for the responsibilities assigned (obviously), it is not built with the people in mind.

What this means is that we create our accountability chart based on the roles and responsibilities your business has and needs, not the individuals that currently work for your business.

It's only after your business's roles and responsibilities are mapped out clearly that you assign an individual to them.

It's ultimately up to you to determine who fills these roles and responsibilities - even if it's entirely you! You get to decide if you want to hire people to help.

This process is critical even if you don't want to "scale" and ensures that core components of your business aren't left to whither - even when the going gets tough.

If you do want to scale, this exercise will let you see what you want to be doing and what you don't want to be doing, and then hire accordingly.

USING THIS GUIDE / TEMPLATE

This guide is broken up into two sections: the visualization, and the glossary.

The visualization section shows you a starter Accountability Chart as a flowchart. It shows you how the various functions play off of each other, and also clearly indicates the line of authority.

The glossary section explains each role by the responsibilities that are typically associated with it in plain English.

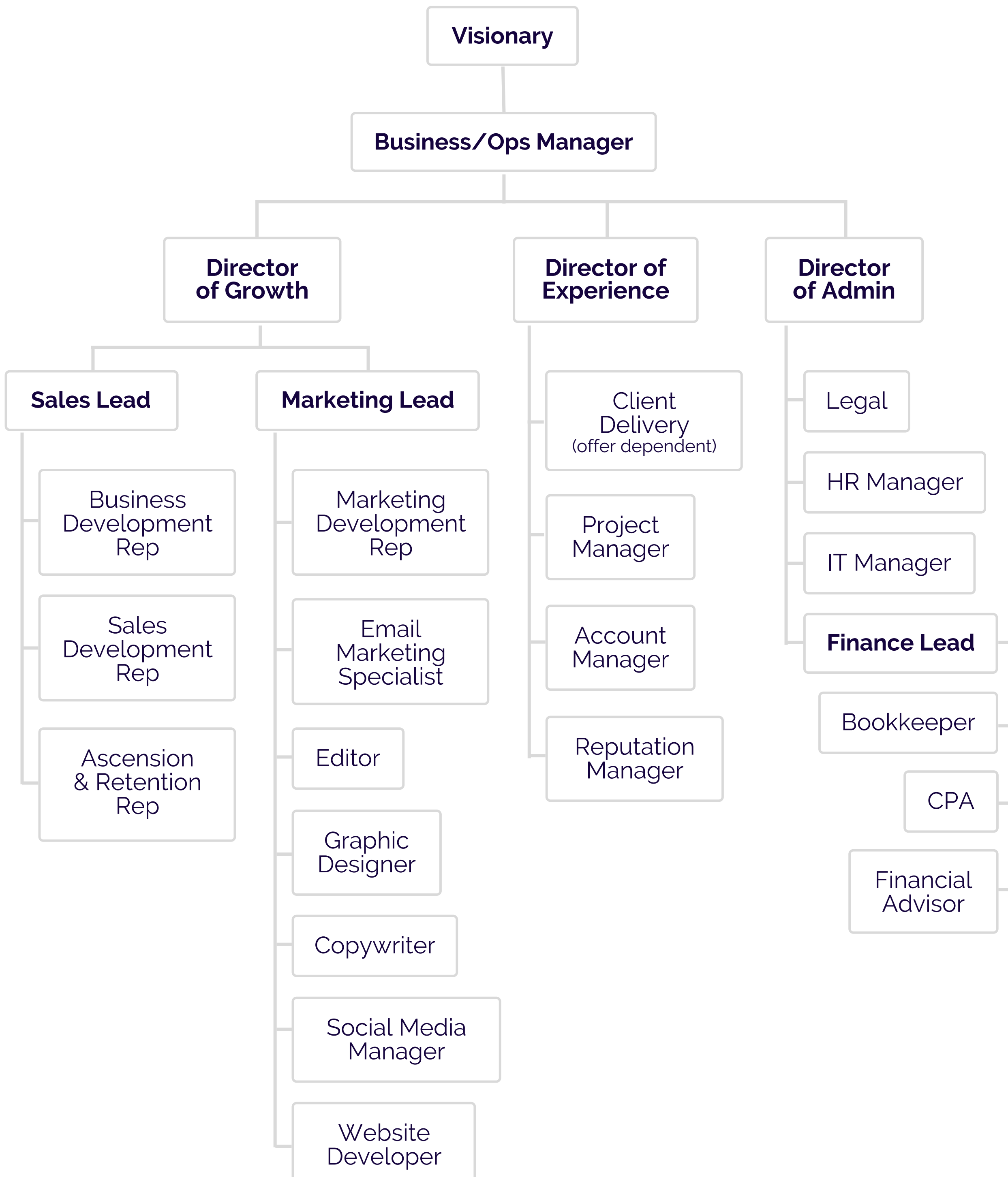
Your job is to take our template and adjust it accordingly. You can rename, delete, add on to, and reorganize to your heart's content. The only two criteria are:

1. Each role has at least 2-3 primary responsibilities, but no more than 5
2. No two roles share responsibility

Once this process is complete, you'll assign each individual in your organization to their role (or roles if you're a small team). You'll then decide how each individual will ensure their responsibilities are upheld, and how they'll inform you that is the case.

THE VISUALIZATION

You can see this in its original LucidChart form by following this link (requires a LucidChart account). You can see this in its larger form by following this link.



GLOSSARY

LEADERSHIP TEAM

The Visionary

The Visionary in your organization is, very likely, YOU!
Quickly summarized, the Visionary is responsible for the overall direction of the company. This includes:

- Thought-leadership and industry knowledge
- Setting the course of action for big ideas
- Creating, developing, and nurturing big relationships
- Fostering the company culture
- Keeping tabs on industry trends

Business/Operations Manager

The Business/Operations Manager is the second-in-command to the Visionary, and is primarily responsible for enacting the Visionary's....vision! All other leadership roles report to the Business/Operations Manager.

- Managing/monitoring/updating the numbers
- Leadership, management, and accountability of the leadership team
- Removing obstacles and barriers for the team
- Facilitating company meetings/planning/etc
- Ensuring communication between leadership parties

Director of Growth

- Brand keeper / Messaging / Expectation setting
- Sales and marketing alignment
- Generating revenue for the company
- Strategic planning for marketing campaigns
- Competitive/industry research

Director of Experience

- Client success management
- Improving client delivery processes

- Ideating offer improvements
- Tracking customer success metrics

Director of Admin

- Monitoring reporting for finance
- Projections/forecasting
- Managing recruiting processes
- Communicating between legal and leadership team

GROWTH TEAM

Business Development Rep

- Nurturing cold and warm leads
- Qualifying leads for Sales Development Reps
- Prospecting for new leads as necessary
- Booking meetings for Sales Development Reps

Sales Development Rep

- Running qualified sales meetings
- Nurturing deals in the pipeline
- Closing deals
- Handing off new clients to the client/customer experience team

Ascension & Retention Rep

- Long-term nurturing clients
- Upselling clients into deeper offers

EXPERIENCE TEAM

Client Delivery Roles

- These roles cannot be standardized as they are dependent on the offers that your business has.

Project Manager

- Ensuring all client deliverables are on track
- Handling logistics (travel, shipping, etc)
- Delegating resources as needed
- Monitoring delivery bandwidth
- Managing project management tool(s)

Account Manager

- The primary point of contact for existing clients
- Triaging requests/updates to client delivery roles
- Passing qualified clients to Ascension and Retention Reps

Reputation Manager

- Collecting testimonials from clients
- Posting/distributing testimonials as relevant
- Passing testimonials to growth team for content
- Passing along reputation-based issues to leadership

ADMIN TEAM

Finance Lead

- Manages all finance responsibilities and resources
    - Resource allocation
    - Financial advisory
    - Bookkeeping
    - Expense tracking
    - Taxes/CPA
- Communicates pertinent information to the leadership team

Legal Counsel

- Corporate record-keeping
- Advising in legal matters
- Handling lawsuits
- Company formation/organization strategy

HR Manager

- Specifying payroll instructions for Finance Lead
- Coordinating onboarding and training for new employees
- Managing team schedule/time off
- The mouthpiece of employees for the leadership team

IT Manager

- Managing company email/servers/etc
- Troubleshooting and updating hardware
- Solving general technology problems

Questions or Comments?

Contact us at
hello@speakerflow.com
and let us know what you think!

SPEAKERFLOW
speakerflow.com