

Best practices for communicating role expectations



A complete must-read guide to best practices in ensuring role clarity



Be Brilliant.™

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Introduction:

Why role clarity is so important

If you want to build a world-class workforce and achieve stellar results, a few things need to be clear in your organization from the get-go. Everyone needs to have a solid understanding of:



their own roles



their manager's role



the organization's expectations of them



the behaviors that lead to success

Together, these elements provide role clarity and support both individual and organizational high performance.

So what are some of the costs when role clarity is ignored? Employees can become frustrated and disengaged, performance can suffer, and the organization can become misaligned — all of which can hinder your organization's ability to meet its objectives.

When we look at it through this lens, providing role clarity for all your employees becomes not just a nice-to-have; it becomes a strategic imperative.

In this eBook, you'll:

- Discover the best practices research that every organization should follow to provide role clarity.
- Find out how you can adopt those practices in your organization, using the Halogen TalentSpace™ suite.
- Read about companies who've adopted these practices and are realizing some impressive benefits.

Best practices for providing role clarity

As employee roles become more complex and the pace of change increases, providing role clarity becomes more of a challenge.

In order for organizations to achieve top results, there must be clear alignment between their objectives and what employees spend their time doing. Unfortunately, less than 50% of employees know what is expected of them at work according to the Human Capital Institute. Studies from the Corporate Executive Board suggest that the average employee spends 50% of their time on non-productive work. IDC research sheds light on how costly this misalignment can be. For U.S. and UK companies alone, the cost of employees not fully understanding their job is \$37 Billion USD each year.

So how do you clearly communicate role expectations to employees throughout the employment lifecycle?

Research points to five best practices:



Using competencies to communicate desired behaviors



Outlining job accountabilities in job descriptions



Clearly identifying requirements in job requisitions/postings



Setting SMART goals that are aligned with the organization's objectives



Maintaining ongoing conversations about expectations

Let's look at each of these best practices in more detail.



Best practice #1

Use competencies to communicate desired behaviors

Competencies are defined as the observable and measurable knowledge, skills, abilities and attributes that lead to high performance and success in a role or in the organization. They're a way to describe "how" work gets done.

As such, competencies are a vital way to communicate role expectations with greater clarity.

Research from the Corporate Executive Board tells us that organizations should define a set of measurable core, leadership and job-specific competencies that align with business objectives. These should be specific and defined in terms of observable behaviors, so they can be assessed or measured.

Once established, these competencies should be used to guide recruiting, performance management, development and career planning, and succession planning, so the organization can build organizational strength and culture, and support individual success.



Studies by Bersin by Deloitte, the Aberdeen Group and the Human Capital Institute, show that using competencies in this way helps to:

- Improve hiring and selection decisions through competency-based assessments
- Improve candidate quality by providing candidates with the information they need to self-identify and to communicate their experience and capabilities
- Improve employee engagement and reduce turnover by helping employees understand what it takes to be successful in their role
- Increase employee effectiveness by helping them focus on required/ desired behaviors
- Provide a way to identify skill gaps that need to be addressed
- Reduce learning and development costs or refocus development dollars by aligning learning and development to the right competencies
- Enable internal mobility by making employees aware of the skills and capabilities required for other positions
- Build talent pools for succession planning purposes



According to research by the Aberdeen Group, organizations should agree on a consistent set of competencies that support business objectives and are used throughout the employee lifecycle. The Aberdeen Group found that best-in-class organizations:

- Have a common language for organizational competencies, and use them to assess and develop employees
- Integrate their competency models with their performance management programs
- Integrate their competency models with their learning and development initiatives

And both Bersin by Deloitte and the Corporate Executive Board found that competencies form an important foundation for effective talent management.

You can learn more about how to use competencies to effectively communicate job expectations from our [Center of Excellence for competency management](#).



We've also created a [Competency definition template](#) that you can download and use to help you define and describe the competencies for your library.



Best practice #2

Outline job accountabilities in job descriptions

To support role clarity, every employee should have an up-to-date job description that outlines the performance expectations and accountabilities for their role.

Research by HRIZONS, Bersin by Deloitte and the Corporate Executive Board found that using job descriptions as a foundation is an important way to improve the effectiveness of your talent management programs — from recruiting through to retirement.

When properly executed, job descriptions establish clear performance requirements. These descriptions not only help improve accountability and performance, they can also help you attract and retain employees.

The best job descriptions are created not by HR alone, but in concert with the various stakeholders who have a deep understanding of the requirements for the role. This collaborative approach helps ensure job descriptions accurately communicate roles, responsibilities and accountabilities.

And best practice job descriptions leverage the competencies in your competency library, so they communicate performance expectations consistently.

Competencies should be kept up-to-date and made readily accessible to managers and employees.

You can learn more about how to create best practice job descriptions from our [Center of Excellence for job descriptions](#).



We also have [sample job description templates](#) that you can download to guide your efforts.

Job Description

Title: Manager in Customer Service	Job Code: 01
Department: Customer Service	Location: Office
Division: 1	Reporting To: Customer Service Manager
Job Classification: 10	Employment Type: Full Time
Created Date: 01/10/10	Version: 1.0

Position Summary

This is a management level position responsible for analyzing and directing all IT related activities of the organization with supervisory responsibilities for all staff assigned to the IT Department. This position is accountable for ensuring continuity of customer service for customer service throughout the organization through planning, technical leadership, and project coordination.

Essential Duties and Responsibilities

Title and Description

Supervisory Responsibilities

Perform all supervisory responsibilities associated with the IT department including analyzing related issues.

Policies and Procedures

Enforce company policies and procedures as a member of management for all employees.

Professional Image

Present a professional image as a representative of the company.

Professional Relationships

Establish and maintain effective professional working relationships with co-workers, and every level of management.

IF/Then

Determine the goals of IT within broad outlines provided by the executive management and contribute to the continuity of computer services by providing technical leadership and project coordination.

Forecast



Best practice #3

Clearly identify requirements in job requisitions/postings

Unfortunately, all too often job postings don't accurately reflect the work an employee will do once they're hired.

This causes two common problems. First, the recruiting process fails to identify properly qualified candidates who will succeed in the role because they're sourcing for the wrong requirements. And, secondly, new hire turnover rates are high because new employees' expectations are not being met.

Job requisitions should give prospective candidates an accurate reflection of the experience of being in the role, and identify the behaviors a candidate must have to be effective in the role. This allows candidates to determine if they are truly a good fit for the position and to effectively communicate their qualifications.

It also allows hiring managers to better assess candidates' suitability for the role and supports best practice behavioral interviewing techniques.

As Tammy Johns, senior vice president at ManpowerGroup, states in a [Harvard Business Review blog post](#), job requisitions should "be specific about the key skills, mindset, and core competencies required to succeed with less emphasis on every skill and task the candidate may encounter. Specificity about what is most important to the role will generate a smaller pool of stronger candidates who can see themselves in that job."

So, as the Aberdeen Group identified, best-in-class organizations define the competencies required at the start of the hiring process.

Here again, there should be continuity between the job requisition/job posting, the job description and the core and job-specific competencies.





Best practice #4

Set SMART goals

Another key way to provide role clarity and communicate expectations is to ensure all employees have effective SMART goals that are aligned to the organization's high-level goals.

We've outlined best practices related to goal management and alignment in our [How to excel at goal management ebook](#).

You'll also find lots of resources and guidance in our [Center of Excellence for goal management](#), including a [Goal setting template](#) and guidance on [writing SMART goals](#).



S **Specific.** The goal identifies a specific action or event that will take place.



M **Measurable.** The goal allows you to determine and measure your progress towards completion.



A **Achievable.** The goal should be achievable given available resources.



R **Relevant/Realistic.** The goal allows for likely success based on available skills and time.



T **Time-bound.** The goal should state the specific time period in which it will be accomplished.



Best practice #5

Have ongoing conversations about expectations

While employees need to have role clarity and understand what is expected of them, in most markets and industries today, that is an evolving thing.

As PWC reveals in their 17th annual CEO survey:

"More seismic shifts loom on the horizon. CEOs told us that three global trends — technological advances, demographic changes and shifts in economic power — would have a huge impact on their businesses over the next five years. And the interplay between them will be as significant as the trends themselves."

As the truism goes: the only thing that is constant is change.

To be responsive to continuous change, organizations need to be highly nimble. And that means employees need to continually adjust and adapt to changing requirements. It's what keeps them and their employers competitive.

So in addition to communicating expectations through competencies, job descriptions, job requisitions and goals, organizations need to ensure their managers and employees are engaged in an ongoing dialogue about expectations.

Employees need to regularly report on their progress, get feedback on their performance, get coaching and learning support, and ensure they clearly understand what is expected of them in their role.

And the only way to stay current and in synch with expectations, both at the macro and micro level, is through a regular, two-way dialogue.

In their research, Bersin by Deloitte, the Aberdeen Group, and the Human Capital Institute have found that when managers consistently conduct regular one-on-one meetings with their employees, employees better understand what is expected of them, feel more engaged, are more accountable, and can perform at a higher level.

How to foster the dialogue

You should foster this dialogue through informal means, as well as regular, formal one-on-one meetings.

How often should managers and employees meet?

That depends on the employee, the complexity of their role, their experience and autonomy, the pace of change, and how closely the manager works with the employee on a day-to-day basis. The interval should be set based on how far back both can remember details about the employee's performance.



To help guide manager-employee discussions, we've develop an [employee feedback template](#) as well as [tips for effective coaching conversations](#).

And our [Performance management training for managers Center of Excellence](#) has a wealth of resources on things like giving feedback, setting goals, engaging employees, coaching, etc

Role clarity in the Halogen TalentSpace™ suite

So how do you implement these five role clarity best practices and ensure everyone in your organization is following them? The Halogen TalentSpace™ suite can help. Let's take a look at how.



Using competencies to communicate desired behaviors



Outlining job accountabilities in job descriptions



Clearly identifying requirements in job requisitions/postings



Setting SMART goals that are aligned with the organization's objectives



Maintaining ongoing conversations about expectations





Best practice #1

Use a common set of competencies to drive talent management processes

The Halogen TalentSpace™ suite comes complete with a comprehensive library of competencies. The competencies include: a definition, descriptions of the various levels of demonstration, and coaching and development tips.

You can preview samples of our competency content [here](#).

You can use the library as is, easily customize the content to suit your needs, import your own library of competencies, or import competencies from a third-party library, including the Lominger Leadership Architect® competency library.

One central library of competencies

The centralized competency library is used across the Halogen Performance™, Halogen 360 Multirater™, Halogen Learning™, Halogen Succession™, and Halogen Job Description Builder™ modules.

This centralization helps you maintain a consistent competency language throughout all your talent management processes.





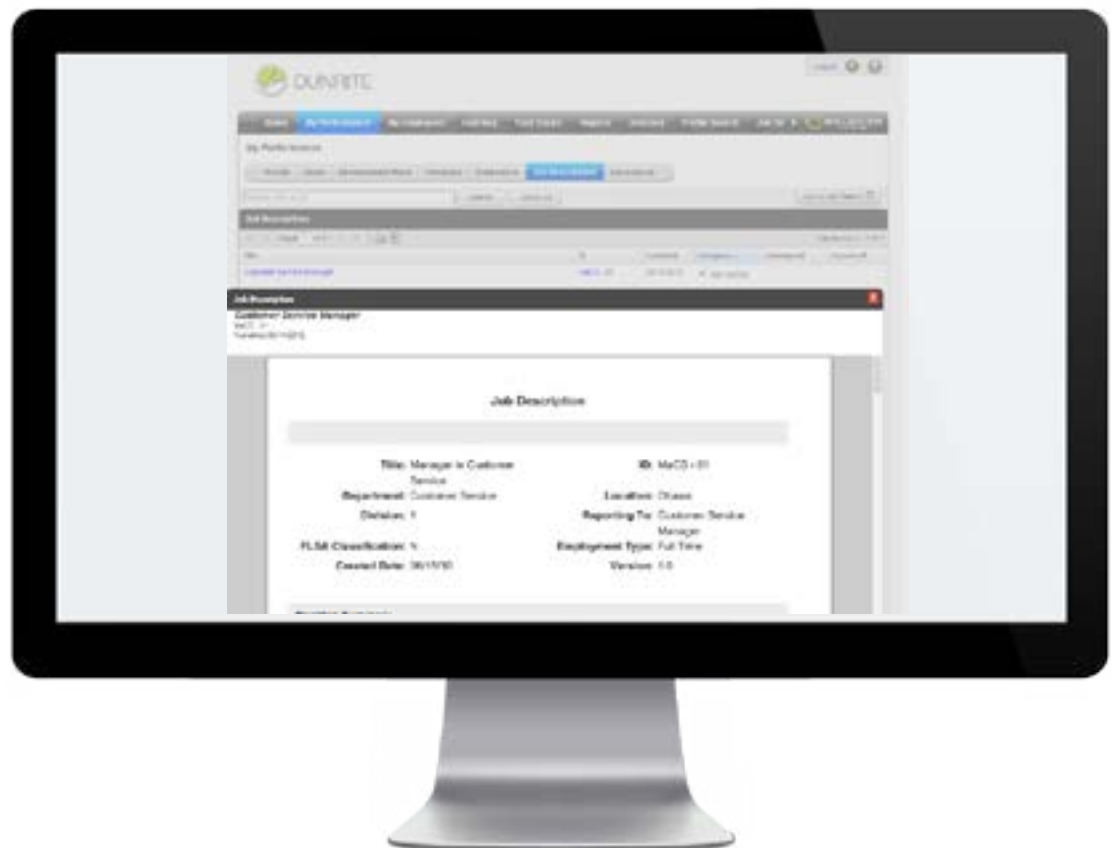
Best practice #2

Ensure every employee has a clear, up-to-date job description

With Halogen Job Description Builder™ you can ensure every employee has an up-to-date job description.

Job descriptions are created using templates, so they contain a standard set of information.

And they include competencies from your centralized competency library, so you communicate role expectations in a clear and consistent way.



Leverage job descriptions to create performance appraisal forms and job requisitions

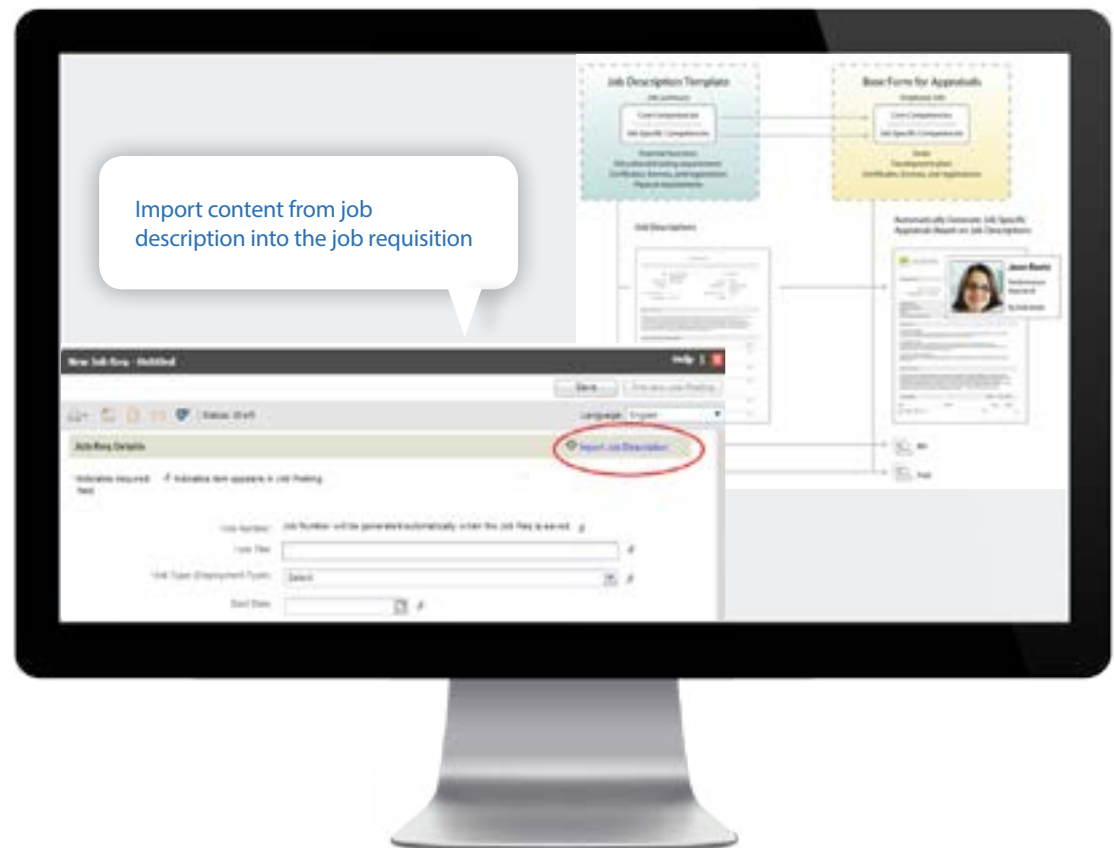
Because all the Halogen TalentSpace™ modules are so tightly and seamlessly integrated, you can automatically generate job specific performance appraisal forms that include the competencies found in the employee's job description.

And when you're creating a new job requisition, you can also import content from the job description into the job requisition.

This not only eliminates duplication of effort, it also ensures consistency and congruence between job requisitions/postings, job descriptions and performance appraisal forms, and improves role clarity.

Support career planning and development

Having up-to-date job descriptions that describe the expectations and accountabilities for each role also supports employees and managers in career planning and development. It allows them to easily see the requirements for all jobs, so employees and managers can assess an employee's readiness for career progression, and put development plans in place to address knowledge, skill and/or experience gaps.





Best practice #3

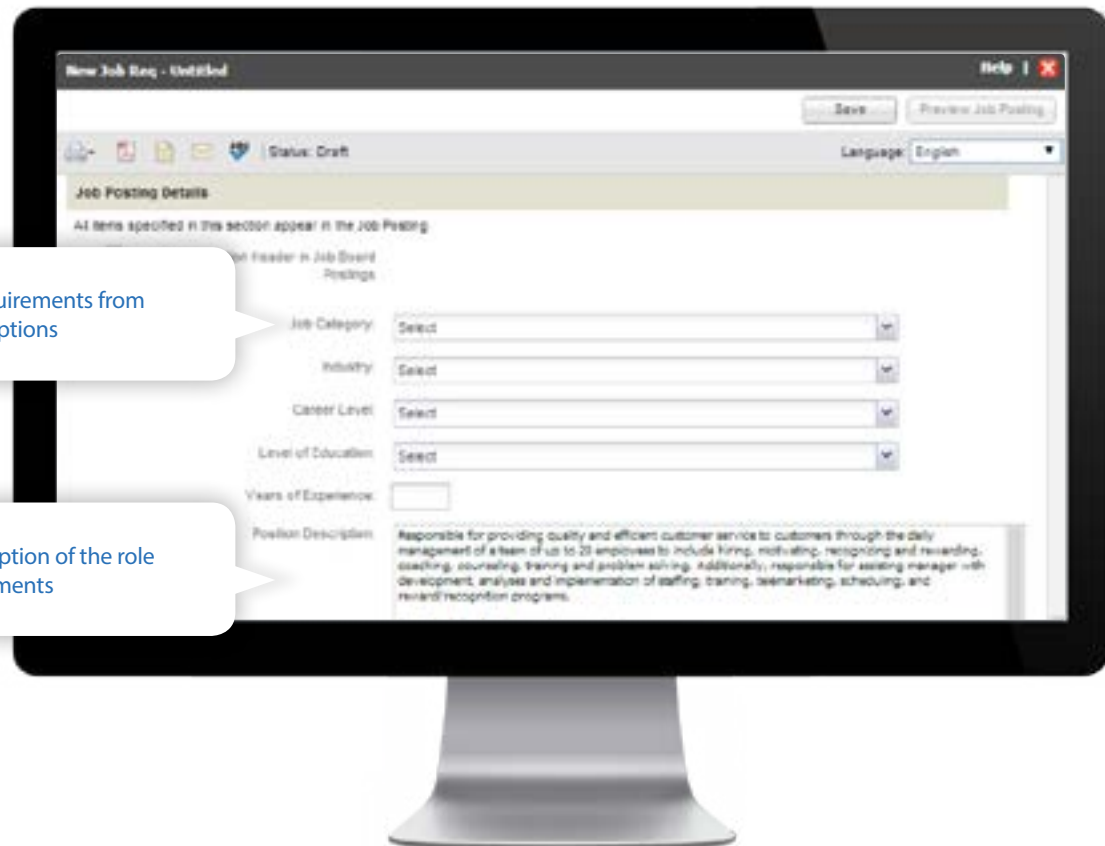
Clearly identify requirements in job requisitions/postings

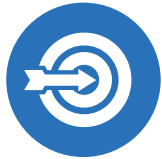
Halogen Talent Acquisition™ lets you import job requirements from your job descriptions to clearly identify the requirements for a role.

By providing a detailed description of the role and its requirements, you can source better qualified candidates, and make better hiring decisions.

Import job requirements from
your job descriptions

Detailed description of the role
and its requirements





Best practice #4 Set SMART goals

Halogen Performance™ supports managers and employees in creating SMART (specific, measurable, achievable, realistic/relevant, time-bound) goals by allowing you to include instructions, as well as all the fields required to make a goal SMART.

All this detail helps managers and employees clearly identify and understand what is expected of the employee in terms of their work, and how their success will be measured.

And it lets you link each employee goal to the organizational goal it supports — for greater clarity.

The screenshot displays a computer monitor showing the Halogen TalentSpace interface. Two callout boxes highlight specific sections of the interface:

- Goal Setting Instructions:** This section provides guidance on creating SMART goals. It states: "Employee goals should follow the SMART format." and lists the components: **S** - Specific, describe what you want the employee to deliver; **M** - Measurable, identify how success will be measured; **A** - Achievable, within the employee's authority and capabilities; **R** - Realistic, challenging and practical; **T** - Time-bound, identify when the goal needs to be completed. It also instructs users to "Set a minimum of two individual goals" and to "link each individual goal with the organizational goal it's designed to support, using the link icon, so the employee has a context for their work and sees how they're contributing to the organization's success." Finally, it says "Enter additional goals (to a maximum of 5 in total) by clicking the Add New Goal button."
- Goal Setting and Alignment:** This section shows a form for creating a goal. It includes a "Title" field, a "Weight" dropdown menu, a "Due Date" field, and a "Measure of Success" field. There are also checkboxes for "Milestone/Contribution" and "Measure of Success".



Best practice #5

Have an ongoing conversation about expectations

Halogen 1:1 Exchange™ supports managers and employees in conducting regular one-on-one meetings to review progress and discuss expectations.

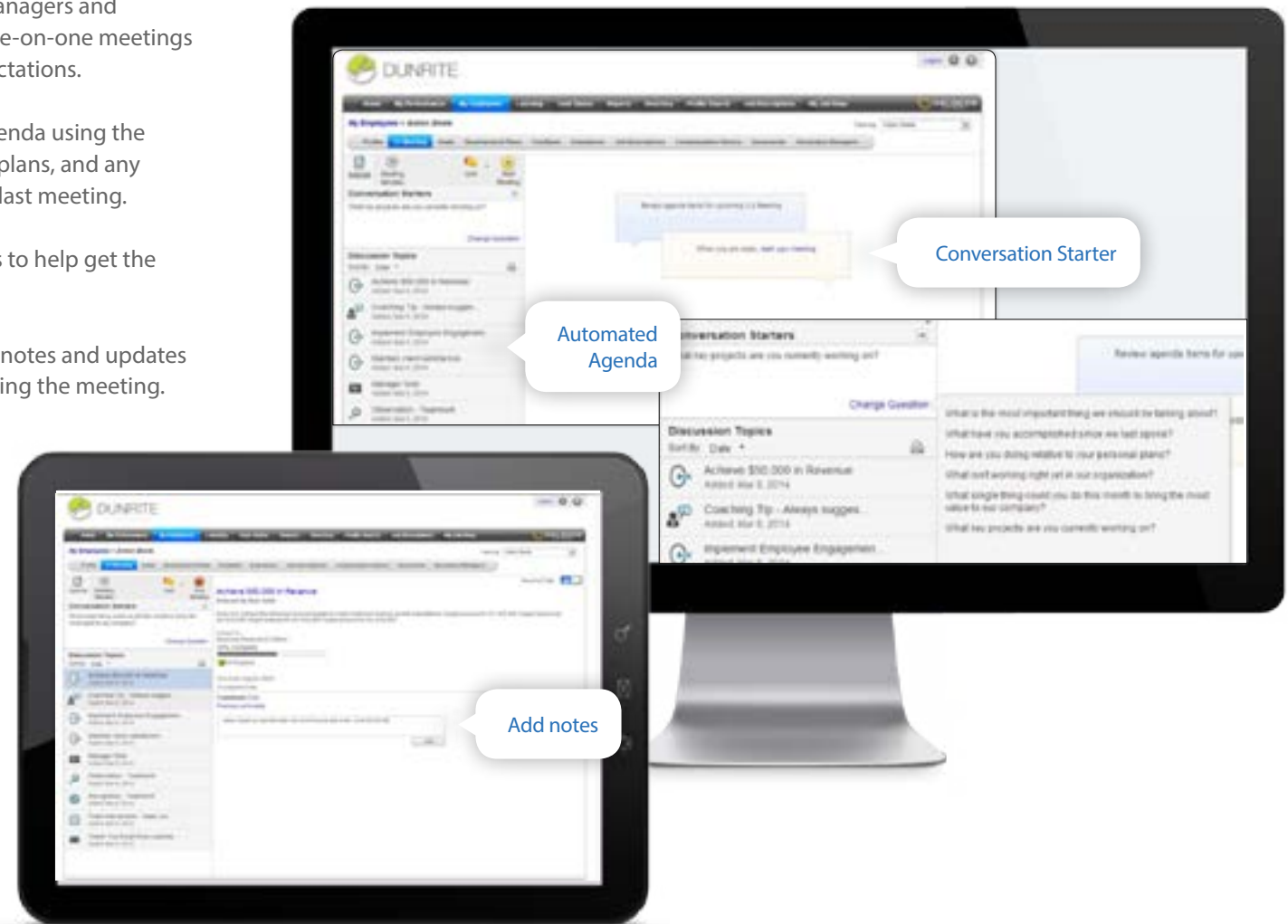
It automatically builds a meeting agenda using the employee's goals and development plans, and any feedback they've received since the last meeting.

It also provides conversation starters to help get the dialogue going.

Managers and employees can make notes and updates to goals and development plans during the meeting.



And Halogen 1:1 Exchange automatically saves everything as meeting minutes for future reference.



Providing role clarity in practice



CarVal Investors



[Read the full CarVal Investors story»](#)

Founded in 1987, CarVal Investors has earned a reputation for integrity, discipline and rapid execution by drawing on its experienced team. Today, with some 125 investment professionals supported by more than 200 administrative, tax and legal professionals in 10 offices across the world, CarVal Investors has acquired over \$37 billion in assets.

With their former talent management system, employees were unhappy with the competency framework and language; the competencies and the way they were defined simply didn't resonate.

The competencies were too vague; there wasn't enough emphasis on the behaviors essential to the business: analytical skills, building the business reputation, and building commercial relationships internally and externally. And CarVal didn't have the flexibility to change them.

So when they adopted Halogen talent management solutions, they implemented a more meaningful competency framework and language specific to roles within their investment business.

They also provided soft-skills training to help their managers [effectively coach for performance](#). As part of the training, they introduced the new financial-service specific competencies, and discussed how to use these competencies to give feedback.

"The palate of competencies using the behavioral-anchored rating scales is yet another added value that Halogen has brought to our work," says Paul Holstead, HR Regional Manager.

Having a common language and framework for their competencies also means they can unify their talent management programs.

"One of the things I'm very excited about is to use performance appraisal outputs and bring these finding into talent management and succession planning meetings," said Holstead. "These outputs will guide calibration conversations that we'll be having when talking about performance and potential. We'll have a common set of criteria and a common language. This creates a strategic opportunity to work with our executive team and more locally with managers, to help them understand what we mean when we talk about potential."

"In terms of bringing people closer together, in terms of the language and through goal alignment, there's now a common focus. As we apply some of the outputs and find new ways to use Halogen tools such as eSuccession it will become more ingrained in our culture, certainly our culture of how we manage people and how we communicate expectations."

Providing role clarity in practice



Methodist Hospitals



[Read the full Methodist Hospitals story»](#)

Methodist Hospitals is one of the best hospitals in Indiana, ranking 13th overall out of 175 hospitals in 2013–14 (U.S. News & World Report Best Hospitals). It's a not-for-profit, community-based healthcare system that provides services to individuals who may not be able to pay for them. As a "safety net hospital", they're always looking for ways to improve efficiencies, while maintaining patient satisfaction.

A few years ago, Methodist Hospitals had hundreds of different job descriptions stored in independent documents. There was no consistency between the terminology used to describe job families or competencies. This made searching job descriptions impossible, and maintaining and updating them very time consuming.

"There's a big cost in terms of overhead and administrative burden for every additional job description," says Ed Klein, Director of Compensation, Benefits and HRIS.

Since the job descriptions were used as the basis for employee appraisal forms, the team at Methodist Hospitals found creating individual appraisal forms for each job description overwhelming.

"Back in the dark ages, we had to create an appraisal form for each of our job descriptions — so our 380 descriptions converted into an additional 380 evaluation forms. I shudder when I think of the work involved," says Klein.

Methodist Hospitals turned to Halogen to help digitize and manage their existing job descriptions and seamlessly link them to appraisal forms. "Now I have one form that automatically pulls in correct job descriptions, and through the magic of Halogen, takes care of weighting and scoring and aggregating important performance management data."

The seamless connection between many job descriptions and the organization's performance review cycle has helped the hospital maximize its use of ongoing performance management processes. Methodist Hospitals is now conducting 30 and 90 day leader rounding, three-month and six-month introductory appraisals, competency assessments, and annual appraisals, as well as performance improvement plans and progress reports with Halogen. And with the administrative burden of the process alleviated from HR and management, the focus has shifted to ongoing performance conversations and mentoring.

"It really has been effective in improving performance and holding leaders accountable," says Klein. "I know I've received comments back from my leaders that it took them half the amount of time to prepare all of their evaluations than it did in the past on paper... And then that opened up more time in their schedules to spend in face-to-face meetings with the employee. That's the supportive, mentoring employee-leader relationship that builds a world class workforce."

Providing role clarity in practice



CPP / Myers-Briggs®



[Read the full CPP story»](#)

Best known as the publishers of the Myers-Briggs Type Indicator® assessment, CPP is a world leader in personality, career, and organizational development assessment. CPP wanted to ensure every employee understood that his or her work makes a difference and is critical to CPP's success.

They set out to:

- Increase their leaders' abilities to manage performance
- Provide clarity and alignment around corporate objectives
- Drive shared ownership, responsibility and accountability of corporate initiatives
- Drive execution by clarifying and aligning individual and team goals

So they revamped their goal setting process, and started using Halogen Performance™ to help them better manage goals and performance.

When CPP rolled out Halogen Performance, the human resources and operations leaders, conducted business plan review meetings with their executives and each department in the organization to build a deeper understanding of the strategic initiatives.

Nicole Trapasso, Division Director of Human Resources and Organizational Development explains, "We went through a business meeting review with the entire company, team by team, to really deeply understand not only what the strategic initiatives were, but also the initiatives at the business and department level. Managers and leaders then co-created the goals with the employees, and linked them in Halogen Performance. It's provided for a very transparent way and a great line of sight so that all employees can really see how their contributions are helping CPP achieve its strategic objectives."

"Now every 90 days we check in for 30 minutes at least, on goals across the entire organization. So if goals are off track or there's a concern that we may not have resources or focus needed to attain them, we're having those conversations prompted proactively, rather than finding out at the end of a review period. So it's really been a great framework for us to continue to reinforce accountability and transparency," shares Trapasso.

Using Halogen reports, CPP can see if goals are aligned across the organization track progress. Employees, leaders and executives can see this information for their own areas, at any time. This in turn drives better performance and accountability — and helps CPP to achieve its strategic objectives.

Key questions for your organization



How do you communicate role requirements and expectation in your organization?



Do you have a customized competency library that describes the core, leadership and job specific competencies that lead to high performance in your organization? Are you using them across your talent management processes?



Do all your employee have role-specific competencies?



Do your job descriptions clearly communicate role requirements and expectations?



Do all your employees have a current job description?



Do your job requisitions/postings clearly communicate role requirements and expectations?



Do you have effective processes for creating and managing organizational and individual goals?



Do all your employees have clear individual goals that are linked to organizational goals?



Are managers and employees having regular one-on-one meetings to discuss and clarify expectations?

Role Clarity Resources

Here are a few of the resources that can help you:



To learn more about how to excel at communicating role requirements and expectations, visit the [Learn](#) section of our website.



You'll find "How To" articles, webinars, whitepapers, forms and templates, and more.



And become a regular reader of our [TalentSpace blog](#).



How to: [Competency management center of excellence](#)



How to: [The basics of competency management](#)



How to: [Job descriptions center of excellence](#)



Template: [Creating a best practice job description template](#)



How to: [Writing effective job responsibilities/essential functions/competencies](#)



How to: [Best practices for creating and maintaining job descriptions](#)



How to: [Goal management center of excellence](#)



How to: [Driving organizational success with effective goal management](#)



Template: [Employee feedback and coaching templates](#)

Wrapping it up

We hope you find this resource valuable in your talent management journey. At Halogen, our vision is to help organizations like yours build a world-class workforce that is aligned and engaged, and delivering exceptional results. We know that your people can be a sustainable competitive advantage.

If you'd like to access the latest thinking on each of the talent management facets discussed here, check out Halogen's [TalentSpace Blog](#).

You can also stay
connected via all of
our social channels.
Join the conversation!



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About Halogen Software

Halogen Software offers an organically built cloud-based talent management suite that reinforces and drives higher employee performance across all talent programs — whether that is recruiting, performance management, learning and development, succession planning or compensation. With over 1,750 customers worldwide, Halogen has been recognized as a market leader by major business analysts and has garnered the highest customer satisfaction ratings in the industry. Halogen Software's powerful, yet simple-to-use solutions, which also include industry-vertical editions, are used by organizations that want to build a world-class workforce that is aligned, inspired and focused on delivering exceptional results.

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