

Leadership Excellence

Exercise 7: Clarity of roles and expectations

List the core functions for each member of the team that you feel are necessary to implement your strategy and achieve your goals. Identify 1-2 developmental opportunities based on the team member’s career interests.

FP/team member 1 summary		FP/team member 2 summary	
Core functions		Core functions	
1.		1.	
2.		2.	
3.		3.	
4.		4.	
5.		5.	
Future interests:		Future interests:	
1.		1.	
2.		2.	

FP/team member 3 summary		FP/team member 4 summary	
Core functions		Core functions	
1.		1.	
2.		2.	
3.		3.	
4.		4.	
5.		5.	
Future interests:		Future interests:	
1.		1.	
2.		2.	

FP/team member 5 summary		FP/team member 6 summary	
Core functions		Core functions	
1.		1.	
2.		2.	
3.		3.	
4.		4.	
5.		5.	
Future interests:		Future interests:	
1.		1.	
2.		2.	

FP = financial professional

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