
Which of the tasks needs to be done on a weekly basis?

Which of the tasks needs to be done on a monthly basis?

Which of the tasks needs to be done on a quarterly basis?

Which of the tasks needs to be done on an annual basis?

Now determine who will be responsible for each of the tasks. Take time to discuss everyone’s strengths and whether they might be the best fit for a particular task. The goal of this part of the exercise is clarity—everyone should be aware of how many tasks need to be accomplished and who is responsible for what.

*Suggestion: Complete this exercise verbally and have someone designated as a transcriber write all of the answers on one Master Worksheet. Or, have everyone complete the first portion of the worksheet individually and then as a group discuss and decide on who is responsible for which tasks.

