

80-20 Function Matrix

The purpose of the Function Matrix Exercise is identify all activities within the business unit and to assign each action to a person (either internal or outsourced) which then forms the basis for Position Descriptions.

It can be a great exercise for the business owner who wants to delegate a bunch of smaller items so that he/she can invest more time on business and marketing development and activity.

Directions: This exercise is best done on an electronic white-board or alternatively on a spreadsheet which is then projected onto a wall. Either way you want all attendees to see the whole matrix.

1. Meet with all the people in your team who report directly to you including your Personal Assistant
2. Write the names of 'direct reports' at the top of the columns to the right of Column 1. Include your own name
3. Brainstorm all activity for all direct reports under column one. No particular order is necessary. Include such items as 'weekly sales report', or 'reception duties' etc
4. Some people find it helpful to split the matrix into different sections e.g. one section for Marketing, one for Sales, one for Client Care and so on
5. In the cell which is intersected by the column of the person who will be responsible for each activity, and the row where the activity is named, place a tick
6. Don't be a martyr! Focus on your HCD-MMA plus Leadership functions such as planning and team focus
7. Delegate the writing of new job descriptions
8. Re do the exercise when necessary

Column 1 Activity	Rob	Jay	Pat	Etc...
Rob's PA Functions				
Rob's typing		✓		
Scheduling appointments		✓		
Marketing				
Campaign Organisation	✓			
Advertising placements			✓	
Sales				
A class clients	✓			
Other clients			✓	