People. Processes. Progress.

THE ROLE CLARITY AUDIT

A Clearer Team. A Stronger Business.

LESS CONFUSION. MORE FOCUS. REAL PROGRESS.

You run your business. I'll help make it run better. ♡

1 GET STARTED

INQUIRE & CONNECT

You fill out a short intake form and we have a quick chat to understand your business, team and goals. I'll confirm the best package for your needs.

YOUR ROLE:
- Complete the intake form
- Share a bit about your business and goals

MY ROLE:
- Review your information
- Recommend the right scope and next steps

2 PROPOSAL & AGREEMENT

SCOPE IT OUT

You'll receive a detailed proposal outlining the scope, timeline and investment. Once you're ready, we'll sign the agreement and you'll submit the initial payment to secure your spot.

YOUR ROLE:
- Review and ask any questions
- Sign the agreement and submit payment

MY ROLE:
- Send a clear, customized proposal
- Get everything set up for a smooth start

3 ONBOARD & GATHER

SET THE FOUNDATION

You'll receive a welcome package with everything you need to know, plus a document request checklist. You'll share the relevant documents and key information about your team and operations.

YOUR ROLE:
- Provide the requested documents and information
- Identify who will participate

MY ROLE:
- Send the welcome guide and checklist
- Answer any questions and keep you on track

4 DISCOVER

GET THE FULL PICTURE

I'll conduct a leadership interview (with you and/or your leadership team) and your employees will complete a short questionnaire about their roles, responsibilities and challenges.

YOUR ROLE:
- Participate in the leadership interview
- Share the employee questionnaire with your team
- Encourage honest, thoughtful feedback

MY ROLE:
- Facilitate the interviews and process
- Analyze all input with care and confidentiality

5 ANALYZE

FIND THE GAPS & OPPORTUNITIES

I dig into the information, map out responsibilities, and identify patterns, gaps, overlaps, and opportunities for greater clarity and efficiency.

YOUR ROLE:
- Sit back (this is my time to work behind the scenes!)

MY ROLE:
- Analyze the data
- Develop your customized findings and recommendations

6 DELIVER

YOUR CUSTOM AUDIT REPORT

You'll receive a clear, easy-to-understand report, including a Responsibility Matrix and practical recommendations tailored to your business.

YOUR ROLE:
- Review the report
- Come prepared with any questions

MY ROLE:
- Deliver your customized report and matrix
- Explain the findings and recommendations

7 DEBRIEF & PLAN

TURN INSIGHTS INTO ACTION

We'll meet to walk through the results, answer your questions, and discuss next steps. You'll leave with a clear plan and the confidence to move forward.

YOUR ROLE:
- Attend the debrief session
- Discuss priorities and next steps

MY ROLE:
- Walk you through the findings
- Provide guidance and support for implementation

8 MOVE FORWARD

A CLEARER, STRONGER BUSINESS

You implement the changes, and I'm here for follow-up support if you need it. A clearer team leads to less stress, greater efficiency and a business that's ready for what's next.

YOUR ROLE:
- Put your action plan into motion
- Reach out if you need additional support

MY ROLE:
- Cheer you on!
- Provide ongoing support (as needed)

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PEOPLE. PROCESSES. PROGRESS.

Invest in clarity. Reap the possibilities. ♡

ROLE CLARITY AUDIT

Professional Services Sample Audit

Hartwell & Pierce Law

Fictional example - all people, organizations and findings are invented for demonstration.

The question behind the audit

What happens when a capable professional team has clear legal expertise - but unclear ownership of the work around it?

You bring me the mess. I'll help you make sense of it.

Meet Hartwell & Pierce Law

Hartwell & Pierce Law is a fictional six-person professional-services firm. The lawyers' legal responsibilities are understood, but the administrative and operational structure around the work has evolved informally. As the practice has grown, senior staff have absorbed additional responsibilities, lawyers communicate priorities differently, and routine operational decisions still move upward.

Team Member	Role	Current Reality
Rachel Hartwell	Managing Lawyer / Owner	Sets strategy but remains involved in routine office approvals, staffing questions and operational exceptions.
Daniel Pierce	Associate Lawyer	Manages legal files and delegates work directly to both legal assistants, often independently of Rachel's priorities.
Nicole	Senior Legal Assistant	Supports files but has also become trainer, workflow troubleshooter, systems expert and unofficial supervisor.
Emma	Legal Assistant	Supports both lawyers and regularly receives competing urgent requests.
Tasha	Office Administrator	Owns office administration but escalates many routine purchasing, scheduling and operational decisions.
Alex	Client Services / Reception	Handles first contact and intake information but does not consistently know when responsibility transfers to legal/admin staff.

Why Rachel Reached Out

The managing lawyer's concern

"We are busy, but I cannot tell whether we actually need another person or whether we just need to organize the work we already have. I am still pulled into too many routine decisions, and everyone seems to be helping with everything."

What Discovery Revealed

- Client intake passes through several people without one administrative owner for the full intake-to-file-opening handoff.
- Nicole's role has expanded substantially beyond legal-assistant work and the office relies heavily on her institutional knowledge.
- Both lawyers delegate directly to both assistants, creating competing definitions of what is urgent.
- Tasha is accountable for smooth office operations but has limited authority for routine operational decisions.
- File closing responsibilities are understood differently by lawyers, assistants and Administration.
- The trust/accounting handoff is documented, consistently understood and functioning well.

Executive Summary

Hartwell & Pierce Law does not appear to have a people problem. It has a role-clarity problem around the administrative and operational work that supports professional service delivery. The firm's collaborative culture has allowed gaps to be covered informally, but that flexibility now depends on individual knowledge, repeated escalation and employees negotiating priorities in real time.

The highest-value changes are not a wholesale restructure. They are to establish clear administrative ownership of client intake and file closing, formalize priority-setting between the two lawyers and support staff, align the Office Administrator's authority with operational accountability, and reduce dependence on the Senior Legal Assistant as the default source of institutional knowledge.

Three Immediate Priorities

Priority	What Needs to Change	Why
1	Create one administrative owner for client-intake coordination.	Reduce dropped handoffs and uncertainty between first contact, lawyer acceptance and file opening.
2	Create one method for communicating and reconciling lawyer priorities.	Prevent support staff from having to decide which lawyer's urgent request wins.
3	Define routine operational authority for the Office Administrator.	Keep ordinary office decisions from returning unnecessarily to the Managing Lawyer.

A Strength Worth Preserving

Trust/accounting handoffs are clear.

Responsibility, required approvals and the transition between legal and administrative work are documented and consistently understood. No structural change is recommended.

Sample Finding 01 - Intake Has Participants, But No End-to-End Owner

Classification: Role Gap / Process-Handoff Issue

Priority: High

What We Found

Alex collects initial client information, a lawyer decides whether the matter will be accepted, and a legal assistant or Tasha may open the file. Each person understands their own task, but no administrative role is clearly accountable for ensuring the matter moves from initial contact through acceptance, required information and file opening.

Why It Matters

A process can have many participants and still lack ownership. When no one owns the complete administrative handoff, follow-up depends on memory and individual initiative, increasing the risk of delay or incomplete information.

Recommendation

Assign Client Services/Reception primary ownership of intake coordination through the point of lawyer acceptance, with a documented trigger transferring administrative ownership to the assigned Legal Assistant for file opening. The lawyers retain all professional decisions about whether to accept a matter.

Sample Finding 02 - Support Staff Are Managing Competing Definitions of Urgent

Classification: Reporting / Priority Confusion

Priority: High

What We Found

Both lawyers assign work directly to Nicole and Emma. Each lawyer reasonably views their own client deadlines as important, but the assistants do not have a consistent mechanism for reconciling simultaneous urgent requests.

Why It Matters
Support staff become responsible for negotiating competing senior priorities without clear authority to do so. Planned work is interrupted, true urgency becomes difficult to distinguish, and workload pressure becomes less visible to leadership.

Recommendation
Establish a shared priority protocol for legal-support work, including what qualifies as urgent, how competing deadlines are surfaced and which leader resolves genuine conflicts. The goal is not to interfere with legal judgment; it is to make the administrative priority process predictable.

Sample Finding 03 - The Office Administrator Owns Operations, But Not Enough Decisions

Classification: Authority Gap

Priority: Medium-High

What We Found
Tasha is expected to keep office operations running but regularly seeks Managing Lawyer approval for routine purchases, scheduling decisions and vendor matters because decision thresholds are not defined.

Why It Matters
Accountability without corresponding authority creates avoidable bottlenecks and keeps the Managing Lawyer involved in decisions that do not require owner-level judgment.

Recommendation
Define routine operational authority for the Office Administrator, including spending thresholds and categories of decisions that may be made independently, with clear exceptions requiring Managing Lawyer approval.

Sample Finding 04 - Nicole Has Become the Office's Human Operating Manual

Classification: Role Creep / Key-Person Dependency

Priority: High

What We Found
Nicole's formal role centers on legal-assistant support, but she also trains new staff, troubleshoots systems, answers workflow questions, provides coverage guidance and acts as an informal supervisor. Several employees identify Nicole as the person they would ask when they are unsure how something works.

Why It Matters
The additional responsibilities consume capacity that is not visible in the formal role and create operational dependence on one employee's knowledge. An absence or departure would expose gaps in training and process documentation.

Recommendation
Decide which of Nicole's expanded responsibilities genuinely belong in the role and formalize them. Redistribute work that does not, document critical procedures and develop backup knowledge rather than relying on one person as the default answer source.

Mini Responsibility Matrix

This shortened matrix shows how the audit translates observed reality into clearer future-state ownership without evaluating legal judgment or individual employee performance.

Work Area	Current Reality	Finding	Recommended Owner	Recommended Change
Client intake coordination	Alex + Lawyer + Assistant + Admin	Gap / Handoff	Alex through acceptance; assigned Assistant after acceptance	Define the transfer trigger and required intake information.
Legal-support priorities	Rachel + Daniel assign directly	Priority Confusion	Shared lawyer priority protocol	Define urgency and escalation for conflicting deadlines.
Routine office operations	Tasha owns outcome; Rachel approves many decisions	Authority Gap	Tasha	Set decision and spending thresholds.
Staff training / workflow knowledge	Nicole informally owns most of it	Role Creep / Dependency	Formalize or redistribute	Document key procedures and train backup coverage.
File closing	Lawyer + Assistant + Admin assumptions differ	Ownership / Handoff	Assigned Legal Assistant coordinates; Admin completes defined close tasks	Create closing trigger/checklist.
Trust/accounting handoff	Clear roles and approvals	Strength	Existing owners	Preserve current structure.

Recommended Priorities

Do Now

- Define end-to-end administrative ownership and handoff triggers for client intake.
- Create a shared protocol for competing lawyer priorities.
- Give the Office Administrator defined routine decision authority.
- Identify the critical knowledge currently concentrated with the Senior Legal Assistant.

Next 30-60 Days

- Update role descriptions where responsibilities have materially evolved.
- Document client-intake and file-closing handoffs.
- Document key office procedures currently held primarily in Nicole's institutional knowledge.
- Cross-train backup coverage for critical administrative workflows.
- Review whether informal supervisory/training responsibilities should be formally assigned.

Preserve

Keep the trust/accounting handoff intact.

It is a useful internal example of what role clarity looks like: clear ownership, clear approvals and a consistently understood transition between responsibilities.

What Clarity Could Look Like

Before the Audit	After the Audit

Rachel: "Why am I still approving routine office decisions?"	Tasha handles defined operational decisions independently; Rachel handles true owner-level exceptions.
Assistants decide which lawyer's request is most urgent.	A shared priority protocol makes conflicts visible and gives leadership responsibility for resolving them.
Everyone participates in intake, but nobody owns the complete handoff.	Intake has a clear administrative owner and a defined transfer point after lawyer acceptance.
Nicole is the answer to every workflow question.	Critical knowledge is documented and backup capability is developed.
File closing varies by matter and person.	The assigned assistant coordinates closing through a defined checklist and Admin handoff.
Clear trust/accounting process.	Clear trust/accounting process - preserved.

Role clarity does not mean telling professionals how to practise their profession.

This audit focuses on the structure around the work: ownership, support responsibilities, authority, priorities, dependencies and handoffs. Professional judgment and regulated responsibilities remain with the appropriate professionals.

What Would Your Responsibility Matrix Reveal?

Professional-services teams often grow by adding capable people and allowing responsibilities to evolve organically. That flexibility can be a strength - until unclear ownership, informal authority and invisible responsibilities begin consuming leadership capacity.

You bring me the mess. I'll help you make sense of it.

ROLE CLARITY AUDIT

Learn more or tell me about your team through the Role Clarity Audit page on my website.

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AMY SMART CONSULTING

Invest in Clarity. Build What's Next.

RIGHT-SIZED SUPPORT FOR REAL PROGRESS.

Clear roles. Stronger teams. A business that runs better. ♡

THE ROLE CLARITY AUDIT

Choose the level that fits your team.

Practical. Structured. Insightful. The Role Clarity Audit gives you a clear picture of what's working, what's not, and what to do next — so your business can move forward with confidence.

DIY Toolkit	Micro	Small	Growing	16+ Roles
$99	**$595**	**$1,250**	**$2,500**	**Custom Quote**
DO IT YOURSELF	UP TO 4 ROLES	5 – 9 ROLES	10 – 15 ROLES	TAILORED TO YOU
All the tools, templates and guidance you need to run a Role Clarity Audit in your own business.	A focused audit to bring clarity to key roles and responsibilities.	A comprehensive audit to uncover gaps, reduce duplication and set your team up for success.	A deeper dive across your team to create alignment, improve efficiency and support your next stage of growth.	A customized audit based on your unique needs, team structure and goals.
PERFECT FOR	IDEAL FOR	IDEAL FOR	IDEAL FOR	IDEAL FOR
Solopreneurs and small teams who prefer a DIY approach.	Small businesses or growing teams.	Established small businesses ready to optimize.	Growing businesses with increasing complexity.	Larger teams or businesses with complex needs.

LAUNCH PRICING

All packages include a detailed report and practical recommendations.
Final scope and pricing are confirmed before work begins.

BUILD IT

Custom HR & Operations Projects

Need more than an audit? I can help you design and implement the systems, documents and processes your business needs — from job descriptions to onboarding systems and beyond.

- Custom solutions based on your goals
- Defined scope and transparent pricing
- Practical, easy-to-use documentation
- Support through implementation (not just a plan)

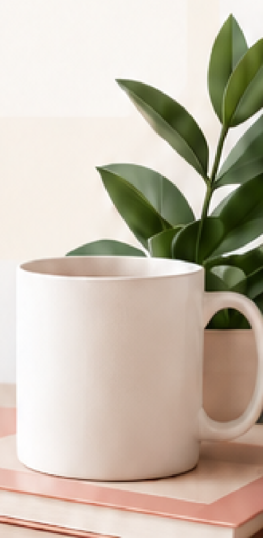
DO IT YOURSELF

Practical Tools for Real Life

Prefer to take the lead? My growing library of downloadable templates, guides and step-by-step resources will help you build better people and operational systems at your own pace.

- Ready-to-use templates and guides
- Practical and easy to implement
- Designed for small businesses
- New tools added regularly

Let me help you figure out your next steps.



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