Sample Roles & Goals Worksheet Template

Purpose: Clearly define team roles, responsibilities, goals, and success criteria when implementing Value Force Multipliers (VFMs). This worksheet fosters accountability, ensures task ownership, and aligns team efforts toward shared CX outcomes.

Project Overview
- Project Name: _____
- Project Lead: _____
- Start Date: _____
- End Date: _____
- Primary Goal: Clearly state the project's overall goal (e.g., "Improve first-call resolution by 20% within three months.")

Team Member Roles & Responsibilities

Role	Team Member Name	Key Responsibilities	Deliverables	Due Dates
Project Lead		Manages overall project and timelines	Weekly updates, project plan	
CX Lead		Defines customer-facing improvements	CX improvement roadmap	
Data Analyst		Tracks metrics and analyzes results	Data reports, insights deck	
Operations Leader		Aligns project with business processes	Process maps, workflows	
Frontline Manager		Manages team implementation and feedback	Staff training, reports	
Executive Sponsor		Removes roadblocks, ensures buy-in	Progress reports, sign-offs	

SMART Goals (Specific, Measurable, Achievable, Relevant, Time-Bound)

Goal Name	Objective	Success Criteria	Target Date	Status
Reduce Wait Time	Cut average wait time by 10%	Average wait time ≤ 2 minutes		Complete
Boost First-Call Resolution	Increase FCR by 15%	85% first-call resolution rate		In Progress
Improve CSAT Scores	Raise CSAT from 75% to 85%	CSAT ≥ 85%		Pending

Milestones & Key Deadlines

Milestone Name	Description	Owner	Deadline	Status
Pilot Launch	Initial rollout of VFM project	Project Lead		Complete
Mid-Project Review	Review progress, adjust strategy	CX Lead		In Progress
Final Review & Scaling	Analyze results and scale project	Executive Sponsor		Pending

Communication Plan

Meeting Type	Purpose	Frequency	Owner
Weekly Team Check-In	Status updates and blockers	Weekly	Project Lead
Monthly Executive Brief	Share progress and approvals	Monthly	CX Lead
Stakeholder Update	Share key project highlights	Quarterly	Project Lead

Accountability Tracker

Team Member	Responsibility	Status Updates	Next Steps

Final Checklist
- Roles Clearly Defined
- SMART Goals Established
- Milestones and Deadlines Set
- Communication Plan in Place
- Accountability Tracker Created

How to Use This Worksheet:
1. **Project Lead:** Fill out the worksheet during project planning.
2. **Kickoff Meeting:** Review roles, goals, and timelines with all team members.
3. **Weekly Updates**: Use the tracker during check-ins to review progress and adjust as needed.
4. **Final Review:** Assess whether goals were achieved and document lessons learned.

This **Roles & Goals Worksheet** keeps your Value Force Multiplier project organized, transparent, and action-oriented.