

FREE RESOURCE

Team Roles & Responsibilities Template

A fill-in table that ends "I thought you were handling that" forever.

How to use this template

List every recurring task in your practice. For each one, name exactly one Owner (does the work), one Approver (signs off, if needed), and note who needs to be Informed. If a row has no owner, you found a gap.

Template — fill in your names

Recurring task	Owner (does it)	Approver	Informed
New prospect logged in CRM			
Follow-up outreach sent			
Engagement agreement prepared			
Account paperwork processed			
Transfers tracked to completion			
Welcome packet sent			
Review meeting scheduled			
Meeting prep completed			
Service request resolved			
CRM weekly cleanup			
Monday ops review run			

Example — filled in

Recurring task	Owner	Approver	Informed
New prospect logged in CRM	Maria (CSA)	—	Advisor
Follow-up outreach sent	Advisor	—	Maria (CSA)
Account paperwork processed	Maria (CSA)	Advisor	—
Review meeting scheduled	Maria (CSA)	Advisor	—

The rule

One owner per task. Shared ownership is no ownership.

Want this built into your practice?

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