playbook
BUILDER™

A ROLE DEFINITION FOR LEADERSHIP

THE MASTER BUILDER SEAT

PART ONE

Part One is for the Visionary and leadership team.

PART TWO

Part Two is the working detail for whoever defines the role and picks the person.

PART ONE

What's missing

For the Visionary and leadership team.

Your Accountability Chart® has Sales and Marketing, Operations, Finance, and People. But usually nobody is accountable for Process and Training.

So the work gets spread across department heads, pushed behind the real job, and rarely becomes Followed By All.

The Master BUILDER fills that gap.

What the person does

They take a Scorecard number that's off track, work out whether it's a people problem or a process problem, pull the answer out of whoever already knows it, turn that into a playbook the team will actually use, get it adopted, and show you whether the number moved.

Then they do it again.

What they look like

- / Project management skills
- / Curious and likes people
- / Solid communication
- / Comfortable with technology
- / Design-oriented
- / Durable and energetic

What it's worth in dollars

Four places the money shows up:

Ramp time.

Structured onboarding on documented processes cuts time to full productivity by 20 to 30 percent, against SHRM and Gallup benchmarks.

Key-person risk.

A process living in one person's head is a liability nobody has costed.

Leadership time.

Undocumented work comes back to you, eating up your time.

Enterprise value.

Buyers discount owner-dependent companies, then push the rest into longer diligence and earn-outs. **If you sell, this is the biggest number here.**

You don't have to hire anyone

You pick that person and we certify them. The credential is included with your PlaybookBuilder account.

Most companies run it part-time as a Role. Larger ones make it a full-time Seat.

What we need from you

1. Fifteen minutes a week, standing, to hear progress and clear blockers.
2. Your backing when they need time from busy experts. Your best salesperson won't give up an hour because a colleague asked. They'll do it because you asked.
3. Protected time. If this is a part-time Role, those hours have to come off something else.
4. Your attention past week six, when something else is on fire.

How you'll know it's working

Not by how many playbooks exist.

By whether Scorecard numbers moved, whether people are using the material, whether the knowledge coming out belongs to the people you can least afford to lose, and whether you're still getting pulled into work that should sit two levels down.

THE DECISION

Name the person, put the accountability on the chart, and back them when it gets difficult.

PART TWO

The detail

For whoever is defining the role, writing it into the Accountability Chart®, and choosing the person.

Why the role exists

When a Scorecard number goes off track, the usual fix is a conversation with the person responsible. Sometimes that's right. Often the real cause is one of these:

The process is out of date

The process changed

Nobody trained the team

Without someone accountable for process, you can't tell which it is. So the same conversation happens again next quarter.

The Master BUILDER's first job is to answer two questions, quickly:

Is the standard current?

Has the person actually been through it?

Most of what follows comes out of that.

Seat or Role

AS A SEAT

A dedicated full-time Master BUILDER. A single owner for process, training, and content across the company. More common in larger organizations.

AS A ROLE

An existing employee, part-time, alongside their current job. No new hire required, but they own it for good. **This is how most teams start.**

Plan on 5–10 protected hours per week to start, depending on the number of playbooks underway. Those hours need to come off something else.

Either way, it's someone already on your payroll, and the credential is included with your PlaybookBuilder account.

Put it on the Accountability Chart®

If nobody is accountable for this work, it becomes everybody's responsibility and nobody's priority.

Whether you make it a full-time Seat or a part-time Role, put the accountability somewhere visible.

Department heads still own the work and results in their areas. The Master BUILDER owns the method for getting that work captured, taught, adopted, measured, and improved.

MASTER BUILDER

Reports to: Integrator or Owner

OWNS:

/ Process and training methodology

/ Playbook development

/ Knowledge capture

/ Adoption

/ Measurement and continuous improvement

HOW THE MASTER BUILDER WORKS

The Playbook Cycle™

The Master BUILDER doesn't randomly document processes. They move the right work through a repeatable cycle.



SIGNAL
Notice Scorecard numbers off track, team friction, bad handoffs, or missed opportunities - and start there.

INSPECT
Understand what's actually happening, find the gap, and determine whether process is really the problem.

BUILD
Pull the knowledge out of the people who have it and turn it into clear, useful training.

ENGAGE
Launch it, communicate it, and get people using it. Publishing isn't adoption.

MEASURE
Look at adoption and business results. Are people following it, and is it working?

REPEAT
Improve what isn't working and move the next priority through the Cycle.

What the person owns

The credential builds six capabilities. These are what you should expect to see developing over the first year.

Managing leadership.
Takes direction from the leadership team on what matters most, then comes back with what they found, what they recommend next, and what they need to do it.

Creating compelling content.
Clear material that teaches and prompts action. This takes enough eye for design to recognize why a piece of training didn't land.

Driving adoption and engagement.
Campaigns and communications that build momentum, not a single announcement email.

Troubleshooting with data.
Uses usage reports and Scorecard measurables to find root causes, without confusing correlation with causation.

Harvesting wisdom.
Interviews and records experts, including making a nervous person comfortable enough to say something useful.

Ongoing improvement.
Uses feedback and data to keep improving what's already published.

Alongside those, the person needs to keep several playbooks moving at once, each waiting on somebody who's busy, and learn new software without waiting to be trained on it.

Where they report

To the Integrator, or directly to the owner. Not into a department.

The person needs time and cooperation from people who don't report to them. That only works if the role sits outside the departments it serves and has visible support from leadership.

What leadership has to provide

Most of the time this role fails, it isn't because the wrong person was picked. It's because the company didn't hold up its end.

A standing weekly meeting. Fifteen minutes. Progress, blockers, what they need.

Support with your experts. Senior, busy people won't give up an hour on a peer's request. They'll do it on yours.

Protected time. Treat the hours assigned to the Role as real capacity, not work they're expected to squeeze in around everything else.

Realistic expectations on timing. A new playbook doesn't produce results in a week. Plan on a quarter before adoption data tells you much.

Attention over time. Somewhere around week six you'll get pulled elsewhere. It helps to expect that in advance.

What they look like

- ✓ **Sees things through.** Takes a playbook from idea to adoption, including the unglamorous middle.
- ✓ **Curious, and likes people.** Enjoys the conversation and keeps asking past the first answer.
- ✓ **Manages up.** Asks for what they need instead of waiting to be noticed.
- ✓ **Gets cooperation.** Wins time from people who don't report to them.
- ✓ **Comfortable with technology.** Learns new software alone, is fine on camera, reads a usage report.
- ✓ **Has an eye for design.** Knows when a piece of training isn't working.
- ✓ **Durable and energetic.** Keeps going when rollouts stall and attention fades.

Picking the person

Look for instincts more than credentials. Training supplies the method. It can't supply someone who cares whether people use what they built.

- ✓ **Where to look.** Operations, administration, marketing, HR or training, project management, customer success.
- ✓ **Seniority matters less than you'd expect.** Someone mid-organization often has more time and already knows who to ask.
- ✓ **Marketing backgrounds do well.** They're used to being judged on whether anyone engaged. Quality and compliance people know process, but often equate thoroughness with good work.

KOLBE



Follow Thru matters most because the Cycle never ends. Someone who starts well and drifts will leave you with half-finished playbooks.

Quick Start in the middle of the range keeps them publishing a rough first version rather than polishing one indefinitely.

How to measure them

The number of playbooks built is easy to count and tells you almost nothing.

Four things are worth watching:

01 **Movement on the Scorecard.**
Every playbook tied to a measurable before the work starts.

02 **Actual adoption.**
Usage data, not distribution.

03 **Coverage of your key people.**
Whether the knowledge coming out belongs to the people you can least afford to lose, such as the estimator, the top producer, or the person a year from retiring.

04 **Leadership's own time.**
If the owner is still taking a laptop on vacation because the team will need them, that work hasn't been captured yet.

When you look at adoption and results together, there are four cases:

HIGH ADOPTION + IMPROVED NUMBER
It's working.

LOW ADOPTION + POOR NUMBER
It's an engagement problem.

HIGH ADOPTION + POOR NUMBER
The process itself may be wrong.

LOW ADOPTION + IMPROVED NUMBER
Something else caused the improvement. Find out what.

What the first year usually looks like

By 90 days	✓ Certified, with three to five playbooks live, each tied to a measurable. ✓ A working weekly rhythm with leadership. ✓ At least one interview that surfaced something valuable nobody had written down before.
By 6 months	✓ Enough adoption data to read. ✓ At least one Scorecard number that moved, with a defensible connection to the work.
By 12 months	✓ Knowledge that used to live in a few people's heads is captured and in use. ✓ New hires get productive faster. ✓ Leadership spends less time on $20/hr work.

Common ways this fails

- × **Defining it as documentation.**
  A lot of material and very little change.
- × **Splitting it across department heads.**
  Each department writes its own. Some produce nothing, others too much, and there's no common standard.
- × **Leaving the person without support.**
  The experts are busy and senior, and without leadership backing they win every time.
- × **Measuring volume.**
  A large library and no movement in the business.
- × **Starting with the wrong playbook.**
  If it isn't tied to a number someone cares about, nobody notices. We've seen a first playbook on resetting the thermostat.
- × **Leadership attention fading.**
  Six weeks in, priorities shift. The person loses standing and the work stops without anyone deciding to stop it.

APPENDIX A · JOB DESCRIPTION

Master BUILDER

REPORTS TO	POSITION TYPE	DEPARTMENT
Integrator or Business Owner	Full-Time or Part-Time	Operations

Position Summary

The Master BUILDER is responsible for coordinating the development, implementation, and ongoing improvement of the organization's processes and employee training. Working with leadership, department managers, and subject matter experts, this individual captures organizational knowledge, develops practical training materials, and ensures processes are understood and consistently followed by employees.

The Master BUILDER helps improve operational efficiency, employee performance, and organizational consistency through effective process management and training.

Key Responsibilities

- Identify and prioritize opportunities for process improvement and employee training in collaboration with leadership.
- Interview subject matter experts to capture organizational knowledge and document established procedures.
- Develop clear, engaging process documentation, instructional videos, and employee training materials.
- Coordinate the implementation and communication of new or updated processes across departments.
- Monitor employee participation, training completion, and adoption of documented procedures.
- Manage multiple process development and training projects, including schedules, deliverables, and stakeholder coordination.
- Evaluate process effectiveness using operational performance indicators, employee feedback, and training data.
- Maintain and continuously improve the organization's library of processes and training resources.

Qualifications

- Strong organizational, project management, and time management skills.
- Excellent written and verbal communication skills.
- Ability to collaborate effectively with employees and leadership across departments.
- Comfortable learning and using technology, including digital training and content creation tools.
- Strong attention to detail, problem-solving abilities, and creative thinking.
- Demonstrated initiative, accountability, and ability to complete projects independently.
- Experience in operations, training, project management, marketing, or process improvement preferred.

Key Performance Expectations

Success in this position will be measured by:

- **Process Adoption:** Employees consistently using and following documented processes.
- **Operational Improvement:** Measurable improvements in business performance associated with process and training initiatives.
- **Knowledge Retention:** Effective capture and preservation of critical organizational knowledge.
- **Training Effectiveness:** Improvements in employee readiness, training participation, and onboarding efficiency.

Training and Certification

The individual will complete the Master BUILDER Certification through PlaybookBuilder and utilize the platform to manage process documentation, training, adoption, and continuous improvement.

Position Note: This role may be assigned to an existing employee or established as a dedicated position. Department managers remain accountable for their operational results, while the Master BUILDER is responsible for coordinating the development, training, adoption, and improvement of organizational processes.

NOW HIRING: MASTER BUILDER

We're Looking for a Curious, Creative Doer.

Someone who loves people, technology, and making complicated things simple.

Are you the kind of person who loves figuring out how things work? Do you enjoy organizing information, creating useful content, and helping people do their jobs better?

We're looking for someone who is naturally curious, organized, creative, and great at getting things done.

As our Master BUILDER, you'll work with people throughout our company to capture their knowledge, turn it into practical processes and training, and help everyone work more effectively.

What You'll Do

- Interview employees to learn how they do their jobs.
- Create engaging training materials, including videos and step-by-step guides.
- Organize and maintain our company's processes and training resources.
- Help employees learn and adopt new ways of working.
- Manage projects and coordinate with people across departments.
- Track results and identify opportunities to make things better.

You Might Be a Great Fit If You...

- Love asking questions and learning new things.
- Are organized and enjoy managing projects.
- Have a creative eye and enjoy making content.
- Are comfortable with technology and learning new software.
- Communicate well and genuinely enjoy working with people.
- Take initiative and follow through on commitments.
- Get satisfaction from making things work better.

Experience in project management, marketing, operations, training, or administration is a plus, but we're more interested in how you think and work than what's on your resume.

What You'll Get

You'll receive training and earn your Master BUILDER Certification through PlaybookBuilder. You'll work closely with company leadership, collaborate with people across the organization, and play an important role in improving how our business operates.

POSITION	LOCATION	COMPENSATION
[Full-Time / Part-Time]	[Location / Remote / Hybrid]	[Salary Range]

Interested?

Send your resume and a brief introduction explaining why this opportunity interests you to [Email Address].

We'd love to hear from you.

Recommended Interview Questions

1 CURIOSITY AND PROBLEM-SOLVING

Tell me about a time you noticed something wasn't working as well as it should. What did you do about it?

Listen for: Natural curiosity, initiative, and a willingness to investigate problems without being asked.

2 WORKING WITH PEOPLE

Describe a situation where you needed information or assistance from someone who was very busy or reluctant to help. How did you approach them?

Listen for: Interpersonal skills, persistence, diplomacy, and the ability to gain cooperation without formal authority.

3 PROJECT MANAGEMENT

Tell me about a project you managed from beginning to end. How did you organize the work, keep people accountable, and ensure it was completed?

Listen for: Planning, organization, ownership, and follow-through.

4 COMMUNICATION AND TEACHING

Imagine you need to teach a new employee how to perform a complicated task. How would you approach creating the training?

Listen for: Clear communication, empathy for the learner, creativity, and an ability to simplify complex information.

5 TECHNOLOGY AND ADAPTABILITY

Tell me about a software application or technology you taught yourself to use. How did you learn it, and what did you accomplish?

Listen for: Confidence with technology, resourcefulness, and independent learning.

6 CREATIVITY AND CONTENT DEVELOPMENT

Have you ever created a presentation, instructional video, training guide, or other material intended to help people understand something? Walk me through your approach.

Listen for: Creativity, attention to detail, and an understanding of what makes information engaging and useful.

7 PERSISTENCE AND FOLLOW-THROUGH

Tell me about a project that lost momentum or encountered unexpected obstacles. What did you do to get it back on track?

Listen for: Resilience, personal accountability, and the ability to maintain progress when enthusiasm fades.

8 MEASURING RESULTS

Describe a time you implemented a change or improvement. How did you determine whether it was successful?

Listen for: Results-oriented thinking, comfort with data, and an understanding that completing an activity is different from achieving an outcome.

9 FINAL INTERVIEW QUESTION · UNDERSTANDING THE ROLE

Suppose you spent three months developing a library of excellent training materials, but six months later, employees weren't using them. What would you do?

Listen for: Someone who recognizes that creating content is only part of the job. A strong candidate will investigate why employees aren't engaging, work with leadership to address obstacles, and make changes that improve adoption.

WHAT MATTERS MOST

The ideal candidate doesn't necessarily have extensive experience in process documentation or employee training. Those skills can be developed through the Master BUILDER Certification.

Look for someone who demonstrates curiosity, strong interpersonal skills, organizational discipline, comfort with technology, and a genuine desire to improve how things work.

Above all, look for someone who takes responsibility for results—not simply completing assignments.

APPENDIX D · A PLAYBOOKBUILDER TOOL

MASTER BUILDER FINDER

Who on your team could own the role?

Write the names of up to three candidates. Score each person 1–5. **1 = Not a fit | 3 = Maybe | 5 = Strong fit**

CRITERIA	CANDIDATE 1	CANDIDATE 2	CANDIDATE 3
GETS THINGS DONE · Follows through.			
CURIOUS · Asks good questions.			
GETS COOPERATION · Works well across teams.			
COMMUNICATES · Makes things clear.			
TECH COMFORTABLE · Learns new tools.			
HAS ENERGY · Keeps things moving.			
TOTAL / 30			

REALITY CHECK			
DO THEY WANT IT? · Would they enjoy the role?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
DO THEY HAVE CAPACITY? · Can they give it 5–10 hours/week?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
WILL LEADERSHIP BACK THEM? · Will they get the support they need?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

DECISION

OUR MASTER BUILDER: _____

SEAT OR ROLE? ☐ Full-time Seat ☐ Part-time Role

REPORTS TO: _____

NEXT STEP **Look for the instincts. We teach the method.**

MASTER BUILDER Credential included with PlaybookBuilder membership. www.playbookbuilder.com

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