

THE AGENCY LEADERSHIP CLARITY AND ACCOUNTABILITY TOOL

A Practical Leadership Operating System Resource for Agency Owners

If you completed the [Leadership Operating System Diagnostic](#), your lowest-scoring section may have identified the part of your agency's operating system that requires attention first.

If you have not yet completed the Diagnostic, you can access it using the link above before working through this tool.

The purpose of this tool is to help you take the next step by examining one recurring pressure point and identifying the leadership action it may require.

It is designed to help you examine one recurring agency problem and determine whether the deeper issue is primarily related to:

- Clarity.
- Team or role alignment.
- Hiring.
- Structure and accountability.
- Leadership.
- Behaviours and values.
- Motivations or pressure patterns.
- A combination of these areas.

The objective is not simply to solve the immediate problem.

The objective is to prevent the same problem from repeatedly returning to the agency owner.

STEP 1: IDENTIFY THE RECURRING PRESSURE POINT

Choose one current situation that continues to create frustration, delay, confusion, conflict, lost opportunity, or additional work.

What is happening?

How often does this situation occur?

Who is involved?

How is the situation affecting the agency, clients, team, or owner?

Recognition Question

If nothing changes during the next six months, what is this problem likely to cost the agency in time, energy, performance, client experience, lost opportunities, profitability, or team morale?

STEP 2: IDENTIFY WHO SHOULD OWN THE RESULT

Who should logically own this responsibility, task, decision, or outcome?

Who is actually carrying it now?

Does the issue eventually return to the agency owner?

- ☐ Almost always
- ☐ Frequently
- ☐ Occasionally
- ☐ Rarely
- ☐ Never

Owner-Dependency Check

Is the agency owner currently:

- ☐ Answering questions that someone else should be able to answer.
- ☐ Correcting work that should have been completed properly.
- ☐ Repeating instructions or expectations.
- ☐ Following up because someone else has not taken ownership.
- ☐ Managing avoidable conflict or emotional reactions.
- ☐ Making decisions that should belong to another role.
- ☐ Completing work because delegation feels slower or riskier.
- ☐ Protecting the team from the consequences of missed commitments.
- ☐ Holding information, relationships, or processes that have not been transferred to the team.

What would need to change for this responsibility to stop returning to the owner?

STEP 3: DIAGNOSE THE REAL PROBLEM

Review each category and select the statements that most accurately describe the situation.

A. CLARITY

- ☐ The expected result has not been clearly defined.
- ☐ The person does not fully understand what successful performance looks like.
- ☐ The agency's priorities or standards are unclear.
- ☐ The owner and team member may have different interpretations of the expectation.
- ☐ The agency has not decided which role should own the work.
- ☐ The person understands the task but not why it matters.

Clarity conclusion:

B. TEAM OR ROLE ALIGNMENT

- ☐ The responsibility may be assigned to the wrong person.
- ☐ The person may have the technical ability but not the natural behavioural fit.
- ☐ The role may not align with the person's values or motivations.
- ☐ Responsibilities overlap between team members.
- ☐ Important work is falling between roles.
- ☐ The person may be overextended, underutilized, or adapting too much.
- ☐ The role has changed, but the responsibilities have not been redefined.

Team or role-alignment conclusion:

C. HIRING

- ☐ The agency does not currently have enough capacity.
- ☐ The required position does not exist.
- ☐ The agency needs capabilities that are not present on the current team.
- ☐ The owner is carrying work that should belong to a new position.
- ☐ The agency may be trying to hire before clearly defining the role.
- ☐ The agency has defined the role but needs a stronger hiring and selection process.
- ☐ A previous hiring decision may have been based too heavily on the resume or interview.

Hiring conclusion:

D. STRUCTURE AND ACCOUNTABILITY

- ☐ The workflow is unclear or inconsistent.
- ☐ Decision-making authority has not been assigned.
- ☐ There is no regular follow-up or accountability rhythm.
- ☐ Deadlines, measurements, or expected outcomes are unclear.
- ☐ The agency depends on reminders rather than a reliable process.
- ☐ The process exists, but it is not being followed consistently.
- ☐ Meetings occur, but they do not consistently produce decisions, ownership, or follow-through.

Structure and accountability conclusion:

E. LEADERSHIP

- ☐ The expectation has not been communicated directly enough.
- ☐ The owner may be avoiding a necessary conversation.
- ☐ The owner may be rescuing rather than coaching.
- ☐ The owner may be taking the work back too quickly.
- ☐ The team member needs clearer feedback, coaching, support, or consequences.
- ☐ The owner's communication style may not match what the person needs to understand and act.
- ☐ The leadership approach is reactive rather than proactive.
- ☐ The owner may be tolerating a situation that requires a decision.

Leadership conclusion:

STEP 4: EXAMINE THE HUMAN OPERATING SYSTEM

Business problems are not only process problems.

Every person brings a Human Operating System into the agency, including their behaviours, values, motivations, communication style, strengths, adaptations, unmet needs, and pressure responses.

Consider the person or people involved in the situation.

Behaviours

How does this person naturally communicate, make decisions, approach detail, respond to urgency, and interact with others?

Values and Motivations

What appears to motivate this person?

What causes the person to engage, take ownership, or lose energy?

Pressure Patterns

What happens when this person experiences pressure, uncertainty, criticism, conflict, change, or overload?

Does the person tend to become:

- ☐ Reactive.
- ☐ Defensive.
- ☐ Avoidant.
- ☐ Controlling.
- ☐ Overextended.

- ☐ Overly cautious.
- ☐ Approval-seeking.
- ☐ Perfectionistic.
- ☐ Unsure.

Leadership Implication

How might your communication or leadership approach need to change to help this person understand the expectation and perform successfully?

Role-Fit Question

Is this person being asked to perform work that fits their natural strengths, behaviours, values, and motivations?

- ☐ Yes
- ☐ Partially
- ☐ No
- ☐ Unsure

STEP 5: DEFINE THE REQUIRED RESULT

Write the specific result that must be achieved. Avoid describing only the activity. Define the outcome.

The required result is:

The person or role responsible for the result is:

The standard or measurement of success is:

The completion date or review date is:

The decisions this person is authorized to make are:

The decisions that still require the owner's involvement are:

STEP 6: PREPARE THE LEADERSHIP CONVERSATION

Use the following framework to prepare for a conversation with the responsible team member.

1. State the Observation

What have you observed without exaggeration, blame, assumption, or interpretation?

2. Explain the Impact

How is the situation affecting the agency, clients, team, or owner?

3. Clarify the Expectation

What needs to happen differently?

4. Confirm Ownership

What will the person now be responsible for?

5. Identify Support

What training, resources, clarification, authority, or coaching may be required?

6. Establish Accountability

When will progress be reviewed, and how will success be measured?

7. Confirm Understanding

What will you ask the person to repeat or summarize to ensure the expectation is clear?

STEP 7: CHOOSE THE CORRECT LEADERSHIP ACTION

Based on your answers, select the primary action required.

- ☐ Clarify the agency's direction, priority, role, or expected result.
- ☐ Realign responsibilities between current team members.
- ☐ Coach the person according to their behaviours, values, and motivations.
- ☐ Create or improve a workflow, process, meeting, or accountability rhythm.
- ☐ Have a direct performance or accountability conversation.
- ☐ Stop rescuing and return ownership to the appropriate person.
- ☐ Redesign the role.
- ☐ Begin planning for a new hire.
- ☐ Strengthen the hiring and selection process.
- ☐ Assess the person or team more thoroughly.
- ☐ Reconsider whether the person is suited to the role.
- ☐ Make a leadership decision that has been delayed.
- ☐ Take another action:

STEP 8: CREATE THE 30-DAY ACTION PLAN

Action 1

What will be done?

Who owns it?

By when?

Action 2

What will be done?

Who owns it?

By when?

Action 3

What will be done?

Who owns it?

By when?

Review Date

When will you evaluate whether the problem has improved?

Evidence of Improvement

What evidence will show that the issue is being resolved?

FINAL LEADERSHIP REFLECTION

Complete the following statements.

The surface problem appeared to be:

The deeper problem is more likely related to:

- ☐ Clarity.
- ☐ Team or role alignment.
- ☐ Hiring.
- ☐ Structure and accountability.
- ☐ Leadership.
- ☐ Behaviours and values.
- ☐ Motivations or pressure patterns.
- ☐ A combination of these factors.

The leadership action I have been avoiding or delaying is:

The responsibility I need to stop carrying personally is:

The next conversation or decision I need to initiate is:

The first action I will take is:

WHAT YOUR CONCLUSION MAY INDICATE

If the Primary Issue Is Clarity

Define the direction, role, expected result, standard, priority, and ownership before expecting someone to perform successfully.

If the Primary Issue Is Team or Role Alignment

Examine whether responsibilities match the person's capabilities, behaviours, values, motivations, natural strengths, and capacity.

If the Primary Issue Is Hiring

Define the role, expected results, required behaviours, values, capabilities, and team fit before beginning the search.

If the Primary Issue Is Structure and Accountability

Create clear ownership, workflows, decision rights, measurements, communication standards, meetings, and a consistent review rhythm.

If the Primary Issue Is Leadership

Identify the conversation, coaching, feedback, boundary, delegation decision, or consequence that the owner needs to initiate.

If the Primary Issue Involves Behaviours, Values, or Pressure Patterns

Avoid assuming that a visible performance problem is simply a skill or attitude problem.

Examine how the person naturally works, communicates, decides, responds to pressure, and remains motivated.

If Several Areas Are Involved

Avoid trying to solve them as isolated problems.

Build an integrated response that connects clarity, team insight, hiring, structure, accountability, and leadership.

The goal is to lead the system rather than continue carrying the system.

COMPLIMENTARY CONFIDENTIAL INTERPRETATION

Once you have completed the tool, email the sentence you wrote under:

“The deeper problem is more likely related to...”

You may also include the leadership action you identified in the Final Leadership Reflection.

Send your response to:

sreilly@leadingadvisor.com

I will provide a brief and confidential interpretation of what the situation may be revealing and identify the leadership action that may be most important to consider next.

Simon Reilly

Leading Advisor Inc.

Values & Behaviours Analyst

Leadership, Team and Hiring Advisor