PCI COMMUNITY BANKING PERFORMANCE MANAGEMENT

Role Alignment Worksheet

ORGANIZATIONAL READINESS | NOVEMBER 2026

Complete with the employee for one role and one strategic priority. Compare connected roles to resolve handoff conflicts before agreeing on commitments. Use this worksheet in the next performance conversation.

Role and employee

Manager

Strategic priority and intended bank outcome

01 Contribution and evidence

What should this role accomplish or do differently? What evidence will demonstrate progress, including quality and required controls?

02 Decision authority

What can the employee decide? What requires consultation, approval, or escalation, and to whom?

03 Capability and support

What knowledge, skills, information, or tools are needed? Who will provide support and by when?

04 Capacity and tradeoffs

What work must be reduced, reassigned, improved, or stopped to make room for the contribution?

05 Dependencies and handoffs

Who supplies inputs or receives the work? Who owns follow-up? Resolve conflicting expectations with the relevant manager.

06 Next commitment and review

Agree on one action, its owner and due date, and when the manager and employee will review progress and obstacles.

Commitment owner and due date

Review date

Manager check: Do expectations, authority, resources, and measures work together? Adjust any unresolved conflict before finalizing the commitment.