

VMAE VETERINARY PRACTICE HEALTH SERIES

ROLE CLARITY: A LEADERSHIP TOOL FOR STRONGER VETERINARY TEAMS



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Today's Agenda


What we'll learn:

- Identify where role ambiguity quietly impacts hospital performance
- Understand how unclear ownership affects communication, accountability, and culture
- Learn a practical framework for improving role clarity across workflows and roles
- Apply systems thinking strategies that strengthen collaboration without creating rigidity

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About Me



I'm Joanne, a veterinary operations leader and organizational psychology nerd who loves people, process, and is a big fan of making work make sense.

Mom to Westley, George, and a small but sassy flock of chickens.

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How clear are roles for your team?

POLL QUESTION #1



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A 2024 Gallup poll showed,

46%

of employees strongly agree they know what's expected of them at work



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The Illusion of Clarity



One of the biggest challenges with role clarity is that leaders often believe clarity already exists.

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The Effect of Role Ambiguity on Culture

- People are left to guess what "good" looks like
- Feedback can feel like failure instead of coaching
- Shame replaces learning
- Team members become hesitant to ask, speak up, or take ownership
- Confidence, trust, and retention are affected

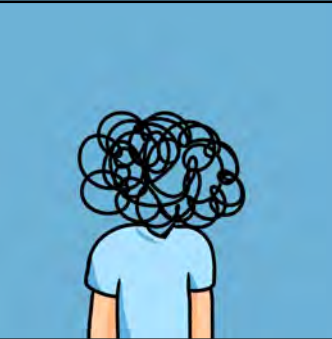
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The Hidden Work of Unclear Roles

When people are unsure who owns a process, they spend mental energy interpreting expectations instead of focusing on patient care, communication, and workflow.

In a hospital environment already carrying a high emotional and cognitive demand, that extra load matters.



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Why is vet med vulnerable to role ambiguity?

High interdependence + high interruption + emotional labor



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When roles aren't clear in your hospital, what tends to happen?

POLL QUESTION #2

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WHEN ROLE CLARITY BREAKS DOWN

OPERATIONAL SYMPTOMS	HUMAN / SYSTEM IMPACT
<ul style="list-style-type: none"> • Lack of follow-through • Duplicated work • Bottlenecks • Inconsistent client communication • Follow up failures 	<ul style="list-style-type: none"> • Frustration • Burnout • Perceived unfairness • Decision fatigue • Reduced trust between teams

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What Role Clarity Looks Like

<p>01</p> <p>Greater accountability & ownership</p> <p>Team members understand what they are responsible for, leading to stronger commitment, follow-through, and accountability.</p>	<p>02</p> <p>Boosts morale and team effectiveness</p> <p>Clear roles reduce frustration and uncertainty, helping teams work more confidently, collaboratively, and efficiently.</p>	<p>03</p> <p>Enhances patient care & client experience</p> <p>Stronger role clarity improves communication, coordination and consistency across the client and patient journey.</p>
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STRATEGIES FOR IMPROVING ROLE CLARITY




Practical tools to define expectations, reduce guesswork, and help teams work with more confidence and consistency.

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Role clarity is a leadership responsibility.

Leaders shape the systems, expectations, communication, and consistency in the work.



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Define excellence

Be clear on what excellence in the role means to you before you ask the team to deliver it. People cannot meet a standard they have never seen.

Empower others

Give people the clarity, trust, and authority to do their own work. Empowerment only works when people know what they are empowered to do.

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Foster teamwork ————

Make it clear how roles work together. Collaboration is easier when people understand where their work connects, overlaps, and depends on others.

Provide ongoing feedback & support ————


Give feedback early and often. People shouldn't have to guess whether they are meeting expectations until something goes wrong.

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Help people understand their value.

- Why does this role matter?
- How does this role support the team?
- What impact does this role have on patients and clients?
- How does this role contribute to hospital success?



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What best describes how roles are discussed in your practice?

POLL QUESTION #3

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Simple in theory, not easy in practice.

01

Functional Expectations

What am I responsible for?

02

Emotional Expectations

How am I expected to show up?

03

Relational Expectations

How am I expected to work with others?

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BUILDING ROLE CLARITY

How functional, emotional, and relational expectations show up in daily hospital life.

ROLE	FUNCTIONAL	EMOTIONAL	RELATIONAL
Hospital Manager	Keeps the hospital pointed in the right direction. Makes priorities clear.	Regulates the emotional tone of the hospital.	Connects doctors, support team, clients, and leadership around shared goals.
Associate Veterinarian	Delivers high-quality medicine.	Carries pressure without destabilizing the team.	Treats the team as partners in patient care, not just task support.
Lead Technician	Builds technical team capability and keeps inpatient/outpatient flow on track.	Models calm competence under pressure.	Act as "air traffic control" between the floor, doctors, CSRs, clients, and leadership.

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DEFINING EXCELLENCE: A LEADERSHIP EXERCISE

EACH LEADER DEFINED:

- What excellence looks like in their own role
- What they expect from the other leadership role
- What they expect from associate DVMs, Leads, and the support team

WHAT BECAME CLEAR:

- Shared many expectations, but emphasized different success factors
- "Good" included much more than tasks
- Most expectations had been assumed more than clearly named

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<h2 style="margin: 0;">PRIMARY & SECONDARY FUNCTIONS</h2> <p style="font-size: 0.8em; margin-top: 10px;">Not every task carries the same weight. Role clarity helps teams separate the work someone is truly accountable for from the work they may support when time, training, or hospital needs allow.</p>	<p>A practical way to clarify roles.</p>
	<p>PRIMARY FUNCTIONS The work this role is expected to own consistently.</p> <p>SECONDARY FUNCTIONS The work this role may help with, without losing focus on their main responsibilities.</p> <p>SUCCESS FACTORS The signs that someone is doing the role well.</p>
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<h2 style="margin: 0;">Role Clarity in Practice</h2> <h3 style="margin: 0;">Hospital Manager</h3>		
<p>01</p> <p>PRIMARY FUNCTIONS</p> <ul style="list-style-type: none"> • Team leadership • Staffing and scheduling • Client experience • Financial performance • Operational excellence • Accountability and coaching • Communication between hospital and practice owner 	<p>02</p> <p>SECONDARY FUNCTIONS</p> <ul style="list-style-type: none"> • Front desk/floor coverage in a pinch • Client escalations • Inventory problem-solving • Training/onboarding support • Equipment troubleshooting 	<p>03</p> <p>SUCCESS FACTORS</p> <ul style="list-style-type: none"> • The team knows the priorities. • Problems are addressed before they become patterns. • Doctors, techs, and CSRs are not operating in separate worlds. • The HM is not the only person who can solve every problem.
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<h2 style="margin: 0;">Role Clarity in Practice</h2> <h3 style="margin: 0;">Lead Technician</h3>		
<p>01</p> <p>PRIMARY FUNCTIONS</p> <ul style="list-style-type: none"> • Supporting patient care flow • Reinforcing medical and technical standards • Training/coaching TVAs • Helping DVMs get what they need from the team • Escalating patient care or team concerns appropriately 	<p>02</p> <p>SECONDARY FUNCTIONS</p> <ul style="list-style-type: none"> • Inventory • Scheduling • Equipment care/maintenance • Client education • CSR liason • Protocol updates • New hire onboarding 	<p>03</p> <p>SUCCESS FACTORS</p> <ul style="list-style-type: none"> • The floor feels more organized when they are present. • Team members feel supported • New team members know what good looks like • Doctors trust the technical team. • Issues are raised early • Standards are reinforced
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Role Clarity in Practice

CSR

01

PRIMARY FUNCTIONS

- Providing client service excellence
- Answering phones and messages
- Scheduling appropriately
- Lobby/exam room flow
- Communication between client and medical team
- Helping clients understand next steps

02

SECONDARY FUNCTIONS

- Basic client education
- Prescription/refill communication
- Checking clients in and out
- Collecting payments
- Records requests
- Online pharmacy support

03

SUCCESS FACTORS

- Client feels seen, heard, and supported
- Appointments are scheduled consistently
- Knows when to solve, when to ask, and when to escalate
- Medical team is not surprised by missing information

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The RACI Chart

Next steps in role clarity

After you clarify primary functions, secondary functions, and success factors, you can use a RACI exercise to go one level deeper.

- **Responsible:** Who does the work?
- **Accountable:** Who owns the outcome?
- **Consulted:** Who needs input before the decision/action?
- **Informed:** Who needs to know what happened?



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Who owns this in your hospital ?

- 1** callbacks
- 2** scheduled rechecks
- 3** inventory shortages
- 4** responding to online reviews
- 5** reporting broken equipment
- 6** discharge and follow-up

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RACI Example Patient Discharge & Client Communication

TASK	Associate DVM	Lead Tech/CVT	CSR	Hospital Manager
Determine medical readiness for discharge	R	C	I	I
Provide client discharge instructions (medical)	R	C	I	I
Dispense medication and explain how to give	C	R	I	I
Schedule recheck appointment	I	I	R	I
Follow-up call	I	R	I	A

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RACI Example Reporting Broken Equipment

TASK	Staff Member	Lead Tech	Hospital Manager	Medical Director/Owner
Identify and report broken equipment	R	I	I	I
Remove equipment from service/tag out	R	A	I	I
Assess clinical impact and determine workaround	I	R	C	A
Contact vendor / schedule repair	I	I	R	I
Approve repair or replacement spend	I	I	R	I
Verify equipment is functional before returning to service	I	R	I	I
Updated preventative maintenance log	I	I	R	I

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Start Small...

01

Pick a process that hurt recently.

Don't introduce RACI as a framework, introduce it as a fix.

02

Build it with them, not for them.

A RACI handed down from leadership feels heavy. A RACI build in a 10-min huddle feels like problem-solving.

03






Make it visible.

Print it. Put it on the breakroom wall, in treatment, wherever the work happens. If it's not visible to the point of action, it doesn't exist.

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Summary

-  Role clarity is simple in theory, harder in practice.
-  Clear roles go beyond tasks.
-  Leaders create the conditions for clarity.
-  People need to know why their role matters.
-  Clarify in three steps: What do I own? What do I support? and what does good look like?

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Thank you!

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