

# Role Definition Template

Bonus Material from *Team as Code*

Dmitry Matyukhin

2026

## Role Definition Template

In Chapter 5 of *Team as Code*, we established a core principle: **a role is a function, and a person is compute**. A role has defined inputs, outputs, responsibilities, and quality criteria — independent of who (or what) performs it.

This template gives you a structured format for defining any role in your organization. A well-written role definition serves triple duty: it onboards new hires, briefs AI agents, and makes delegation seamless.

**Tip:** Start with your most critical role — the one where ambiguity causes the most pain. A single well-defined role teaches you more than ten vague ones.

## How to Use This Template

1. **Fill in each section** — if you can't answer a field, that's a signal the role needs clarifying.
2. **Be specific about outputs** — “handle customer issues” is vague. “Resolve support tickets within 24 hours with a satisfaction rating above 4.5/5” is a function.
3. **Define the boundary** — what decisions can this role make *without* escalating? That's often the most valuable line in the whole document.
4. **Include an example** — show what excellent output looks like. This single addition eliminates more miscommunication than pages of description.
5. **Review quarterly** — roles evolve. Your definitions should too.

## Worked Example: Customer Onboarding Specialist

Field	Definition
<b>Role Name</b>	Customer Onboarding Specialist
<b>Purpose / Mission</b>	Ensure every new customer reaches their first moment of value within 48 hours of signup, setting the foundation for long-term retention.
<b>Inputs</b>	New customer signup data (name, plan, use case); product documentation; CRM record; any notes from sales handoff.
<b>Outputs</b>	Completed onboarding checklist per customer; personalized welcome sequence sent; first milestone achieved (e.g., first invoice created); handoff note to account management.
<b>Quality Criteria</b>	90%+ of customers reach first milestone within 48 hours. Customer satisfaction score $\geq 4.5/5$ on onboarding survey. Zero customers lost during onboarding due to unresponsive support.
<b>Decision Authority</b>	Can extend trial by up to 7 days. Can offer one complimentary training session. Can escalate billing issues directly to finance. Cannot offer discounts or modify pricing.
<b>Escalation Paths</b>	Technical blockers $\rightarrow$ Engineering Support. Billing disputes $\rightarrow$ Finance. Enterprise accounts ( $> \$10k$ ARR) $\rightarrow$ Account Director.
<b>Tools / Systems</b>	CRM (HubSpot), product admin panel, email platform (Customer.io), shared knowledge base, video call tool (Zoom).
<b>Collaborators</b>	Sales (receives handoff), Account Management (sends handoff), Engineering Support (escalations), Marketing (feedback on messaging).

---

Field	Definition
<b>Example of Excellent Output</b>	<i>“Customer Acme Corp signed up Monday 9am. By Monday 3pm: welcome email sent, kickoff call scheduled for Tuesday 10am. Tuesday 11am: first invoice created in their account, personalized tips sent based on their industry (construction). Wednesday: follow-up email confirming they’d sent their first invoice to a client. Onboarding survey score: 5/5. Handoff note sent to Account Manager with context on their use case and preferences.”</i>

---

**Tip:** Notice how the example of excellent output reads like a story, not a checklist. It shows *what good looks like* in practice — and that’s exactly what a new hire or AI agent needs to calibrate their work.

## Blank Template

Copy this template for each role in your organization. If a field feels impossible to fill, that's the most important field to work on.

---

Field	Definition
-------	------------

---

**Role Name**

**Purpose / Mission**

**Inputs**

**Outputs**

**Quality Criteria**

**Decision Authority**

**Escalation Paths**

**Tools / Systems**

**Collaborators**

**Example of Excellent Output**

---

## Catch-All Clause

Add this line to every role definition:

“Flag anything that affects the customer or the team, even if it falls outside your defined scope.”

As discussed in Chapter 5, a role that’s too rigid becomes a cage. One sentence of latitude prevents the scenario where critical issues go unreported because they “weren’t in the spec.”

### Next Steps

- Define your top 3 roles using this template
- Share them with the people currently performing those roles — do they recognize the description?
- Identify one role that could be handed to an AI agent *today* if the definition were clear enough
- Put your role definitions in version control and review them quarterly

**From the book:** “The role definition sets the *what*; the person brings the *how*.” A role defined this precisely can be handed to anyone — a new hire, a contractor, or an AI agent. The system doesn’t care who executes it.