

THE ROLE PLACEMENT WORKSHEET

Deciding which roles need a desk, one role at a time

Role		Team	
Completed by (person who leads the work)		Date	
Experience stage scored	☐ First year in the role ☐ Experienced practitioner	Review date	

How to use this worksheet

- Complete it for roles, not for individuals, and complete it with the person who leads the work, not on their behalf. A worksheet filled in by a senior executive who has never done the role will place it wherever that executive's habits are most comfortable.
- Where a role is performed by people at very different stages of experience, complete the worksheet twice, once for someone in their first year and once for an experienced practitioner, because the same job title can sit in two different zones.
- Score each question from 1 (rarely or never true) to 5 (true most of the time) and average the scores for each axis. An average of 3 or above places the role on the high side of that axis.
- The scores exist to sort a role into low or high, not to measure it. An average that lands close to 3 is a signal to talk the role through with the team rather than to trust the decimal.

This worksheet is about the role, never about a person. Do not write anyone's name, health, disability, pregnancy, caregiving, leave or other personal circumstances on it, or whether a particular person is ready to work at a distance. Those are separate, confidential conversations that HR leads, and their records are kept apart from role records (see the Individual Arrangement Guide).

Step 1. Settle this first: is the work physically located?

Is any part of the work physically located, at a piece of equipment, a site, a lab or a customer's premises?

☐ No - score the whole role below. ☐ Yes - the work decides where the person is, whatever the map would say. Score only the portion of the role that remains.

If yes, which part is fixed by location? _____

Step 2. Axis One: Real-Time Interdependence

Question	1	2	3	4	5
Waiting. How often does this role's work stall while waiting for a live answer from someone else, rather than a written one that can arrive later?	☐	☐	☐	☐	☐
Handoffs. How often does the role hand work to others, or receive it, in ways that need immediate clarification to avoid rework?	☐	☐	☐	☐	☐
Live problem-solving. How much of the role's important work happens in live problem-solving with others, such as incident response, design sessions or negotiations, where the outcome depends on rapid exchange?	☐	☐	☐	☐	☐
Reading the room. How often does the role need to read people's reactions in the moment, such as hesitation, disagreement or confusion, to do the work well?	☐	☐	☐	☐	☐
Cost of delay. How costly is a delay of a few hours in reaching this person, for the people who depend on them?	☐	☐	☐	☐	☐
Total _____ ÷ 5 = Average _____ ☐ Low (below 3) ☐ High (3 or above)					

1 = rarely or never true 5 = true most of the time (circle one per question)

Step 3. Axis Two: Tacit Learning Carried or Transmitted

Question	1	2	3	4	5
Unwritten judgment. How much of what someone needs to do this role well is judgment that has never been written down and would be hard to write down?	☐	☐	☐	☐	☐
Still learning. Is the person in this role still learning that judgment, typically in their first year or in a new kind of work?	☐	☐	☐	☐	☐
Learning by watching. Do other people, especially newer colleagues, learn by watching or overhearing the person in this role?	☐	☐	☐	☐	☐
Uncovered situations. How often does the role encounter situations no procedure covers, where the right answer comes from experience someone else holds?	☐	☐	☐	☐	☐
What others would lose. If the person in this role were never in the same place as their colleagues, how much would the people around them stop learning?	☐	☐	☐	☐	☐
Total _____ ÷ 5 = Average _____ ☐ Low (below 3) ☐ High (3 or above)					

1 = rarely or never true 5 = true most of the time (circle one per question)

Step 4. Place the role

✓	Zone	Scores	What the placement means
☐	Anywhere	Interdependence below 3, tacit learning below 3	Let location be the person's choice. Plan gatherings for relationship-forming moments: onboarding, the start of a major project, a team conflict that needs resolving face to face.
☐	Anchor	Interdependence 3 or above, tacit learning below 3	Set coordinated anchor days with a stated purpose for everyone who depends on each other, including adjacent teams. Keep the rest of the week flexible.
☐	Apprentice	Interdependence below 3, tacit learning 3 or above	Schedule overlap between learners and the people they learn from, and make sure seniors are present on the days juniors are. Record who the learners are learning from, because the pairing matters more than the building.
☐	Alongside	Both 3 or above	Expect on-site work most days, explain the reasoning, and review the placement as the work or the person's experience changes.

The map is not a ranking. Alongside is not a superior zone to Anywhere; a role in Anywhere has not failed a test of culture or commitment. Where a role is placed in Anywhere, the person's choice of location still sits within your organization's approved work locations; payroll, tax and employment rules differ by state and country, so check with HR before anyone works from a new one.

Step 5. Before you finalize

1. Who needs to overhear this role?

Who learns by watching or overhearing whoever holds it? A role that looks low for its own work may still be the source from which others learn. If the answer names people or teams, schedule the overlap.

2. On the days this role is in the office, are the people it actually works with there too?

If its real collaborators are in other states or countries, an office day is a social day, not a collaboration day; plan its in-person time around gathering that team instead. Name who will collaborate with whom on each in-person day, and its purpose.

3. When will this placement be reviewed?

Set a date, at least annually, and earlier for a role whose work, or whose stage of experience, is changing quickly.

Placement agreed: ☐ Anywhere ☐ Anchor ☐ Apprentice ☐ Alongside Review by: _____

Purpose of this role's in-person days: _____

Not on this worksheet. Whether a particular person is ready to do this role at a distance, and any individual arrangement, accommodation, caregiving or leave question, is a separate decision about a person. The map places roles, not people (Chapter 15). Refer those questions to HR.