How to Think About Roles and Actors

By James Bach

Let's talk about roles and actors. First, let me define my terms. What I mean by a role is *a task that is associated with a contract*. In other words, it is a situation where someone has agreed to do something. This is a little more specific than the typical dictionary definition. A role is staffed with an actor, by which I mean *an agent (not necessarily human) which will perform the task as agreed*.

Now, say there is a task that needs to get done, or a problem that must be solved. Do you need to establish a "role" for that in your organization? Or do you just tell people to do it? To help think this through I made a couple of tables.

Here's how it works. There is a table for roles and a table for actors. The first table lists the dimensions of the concept of a role, then lists typical problems and remedies relates to each of those dimensions. The second table is similar, but lists the expectations of actors who play a given role. If you want to make good decisions about roles in your company, then you need to consider the status and relative importance of each of these elements.

I find it most useful to start with the second table and go through the four key expectations. For instance, a lot of projects are questioning the value of the role of software testers. Do you need testers? For me, going through commitment, competence, readiness, and coordination, helps me explain to my clients what they are going to lose if there are no testers. Developers will have divided commitments, and by the nature of their work will mostly thing about building rather than testing; developers do not study testing in school, and rarely think about the deeper forms of testing because they are already up to their eyeballs keeping up with the latest technologies they must wrangle; when developers do test it's mostly in the moment, instead of looking ahead by weeks or months to anticipate the tools and environments and test data they will have to plan for and develop; and developers tend to spend little time coordinating with other groups, including users, who might help with testing—can you imagine a developer going through 500 half-baked complaints from users and then spending hours or days trying to reproduce those bugs?

A role that has disappeared in recent years in the Agile world is management. Specifically, I don't see a lot of test managers out there. Instead, testers themselves handle management tasks such as negotiating for time and resources and debugging communication problems in the organization that threaten their work. Either that, or it is left to development management, which is usually not focused on or aware of what testers need. The result is completely predictable: testers don't have the time or the equipment or the support they need to do deep testing, and therefore the industry is experiencing a pandemic of shallowly tested, insecure, unreliable software.

So, think about it. Go through the dimensions of roles and actors and consider the tradeoffs. Whatever decisions you make, at least be able to explain your reasoning.

The Role/Actor Heuristic (v1.1)

Dimensions of Role

Dimension	Typical Problems	Typical Remedies
Scope (what the role covers) • Responsibilities • What depends on it • What it depends on	• Role too big for actor; tasks get lost • Big role shared by many actors who fight each other	• Bring more actors in to share role • Break up big role into smaller roles • Create manager role
Power (what the role influences) • Authority/Sponsorship • What roles control it • What roles it controls	• Powerful role leaves others without enough power • Weak role can't get what it needs • Weak role controlled by strong role that doesn't understand it	• Break up big role into smaller roles • Redistribute power • Attach weak role to stronger roles • Strengthen role via stronger actor • Educate controlling roles • Create manager role
Value (what the role does for people) • Specific problems solved • Necessity to organization • Desirability to others • Prestige for actor • New problems created	• Role is not important enough; wastes time and effort • Role creates too much trouble • Role is unpopular and is undermined • Role is thankless and no one wants it • Role ruined by bad actors	• Ritualize or eliminate role • Increase power of role • Get better actors • Use "role model" as actor
Cost (what the role takes from people) • Cost of the actor, equipment, and materials • Cost to accommodate the role • Cost due to other roles becoming complacent	• Role is too expensive • Role makes costs uncomfortably public • Existence of a role causes others to "leave it to the expert" and lose skill. • Necessity to accommodate the role disrupts other roles	• Eliminate role in order to hide cost • Hire highly skilled actors • Hire extremely inexpensive actors • Promote the value of the role to show that costs are justified
Requirements (what role/actor needs) • Environment & tools • Skills & knowledge • Motivation • Outside support	• Requirements are too hard to fulfill • Qualified actors are too hard to recruit • Weak role can't get what it needs	• Make do with less and communicate impact to sponsor • Offer training and coaching • Increase prestige of role • Ritualize or eliminate role
Openness (how actors relate to it) • Ownership & commitment • Casual shareability • Informality • Interruptability • Simplicity • Legibility	• Role is highly territorial • Role is easily disrupted by helpers • Role is difficult to adopt • Role is difficult to let go of • Role is mysterious and opaque • Role too reliant on specific actors • Role is a tragic commons	• Ritualize or eliminate role • Offer training and coaching • Strengthen role • Make strong agreements with actors • Close the role to outsiders • Formalize to improve legibility
Presence (when & where it operates) • Persistence • Responsiveness • Disruptiveness	• Response is too slow • When role goes away and later comes back, people forget many details • Role slows down other roles	• Add more actors to speed it up • Good documentation to preserve history • Ritualize or eliminate the role

Expectations of Actors

Expectation	Typical Problems	Typical Remedies
Commitment (acceptance of duty) • Investment of energy • Accountability	• Conflict of commitment between projects • It may not be clear who to blame • There may be many causes for a problem	• Do fewer projects • Persuade people to commit • Management must watch and listen
Competence (ability to perform) • Study and practice • Self-evaluation	• No training available • Training is actively harmful • Dunning-Krueger syndrome	• On-the-job coaching • Personal ambition • Fake it and hope no one fires you
Readiness (operational status) • Anticipating events • Adapting to new conditions • Maintaining efficiency • Troubleshooting	• Chronically unanticipated obstacles • Black swan obstacle • Another role spoils your plans	• Hire a competent actor • Use a checklist or guideword heuristics • Readiness review • Increase power of role
Coordination (relating to other roles) • Mission negotiation • Resource negotiation • Helping and accepting help • Respecting agreements • Failover strategy • Status reporting • Delivery	• Goal displacement • Forgotten agreements • Partial delivery • Fail to justify need for resources • Poor credibility in negotiation	• Good meetings • Use a checklist or guideword heuristics • Use a map of dependencies • Better sponsorship • Increase power of role