

# Project Fundamentals The RACI



**Do you have a significant program off track?**

**Are you looking to establish some foundations to enable disciplined delivery?**



Encompass has a depth of experience in recovering projects in distress. Whilst that's not everybody's cup of tea, there are some fundamentals that are almost always needed when starting to turn around a project that has floundered.

Client briefings follow a similar theme: The project was large; it had the full backing of the executive and was appropriately resourced. The project roadmap was detailed,

the planned milestones – comprehensive. A new project team was established, the energy was high. Cross division governance was set and – most importantly – executive stakeholders were pleased.

The starting pistol has gone off, however shortly thereafter, cracks start to appear. Key milestones are missed. Tasks are forgotten, or not done. Suddenly, your whole project is amber tracking red.

## So, what went wrong?

Chances are you did not clarify project roles and responsibilities in your roadmap. Clear roles and responsibilities are a critical success factor for any project, especially if the team has new members or is working with members that sit outside of the existing team structure. Without this clarity, projects can quickly go sideways and stakeholders are left trying to pick up the pieces.



This is where we can leverage the RACI matrix. The RACI matrix helps project managers optimise their processes by ensuring each team member and stakeholder understands their specific roles.





## What is a RACI matrix?

A RACI matrix is a chart that defines and documents ownership and responsibility at each stage of your project. Within the matrix, every task, milestone, and decision in the project is mapped out. The term RACI is an acronym that designates four primary roles within a project:

### 01 RESPONSIBLE



One person (or a few people) who are responsible for completing the assigned task or function. They are responsible for finishing the work or making a decision. They are the “doers.”

### 02 ACCOUNTABLE



The single person who is accountable for the successful completion of the work (i.e., the “owner” of the work). This person approves the final work completed. The responsible party is accountable to this person. This role is filled by the project sponsor.

### 03 CONSULTED



The people who provide necessary input and information on the project and tasks. They are usually subject matter experts and play an active role in the process.

### 04 INFORMED



: The people or stakeholders who need to be kept in the loop with progress reports and updates. They do not contribute directly to decisions but need to be aware of them.

## Benefits of the RACI model

The value of the RACI model is that it is both quick and easy to create (though in some organisations, it may take some negotiation and a bit of consultation to get full alignment, especially when making parties external to the project (BAU) Responsible for key work in your project). It is a powerful tool to maintain expectations, organise roles, and optimise processes from project start to finish. It is worth noting at this point that for longer, complex projects that may have multiple phases, the RACI model process may need to be run more than one in the lifetime of the project to ensure it stays relevant and supportive of the project needs.

The RACI model has several key benefits that make it especially valuable for project managers.

- Clarity of roles and responsibilities removes excuses
- Optimises project work, reducing the possibility for duplication of effort (two parties thinking they are responsible for an activity), or worse, activities not being completed because everyone thinks someone else is responsible for it.
- Ensures effective transition between activities
- Promotes communication between teams and stakeholders



Besides clearly designating roles, the RACI matrix encourages greater communication at every level. By giving equal weight to the Informed role, stakeholders who may otherwise have been excluded from the conversation are brought into the loop. Whilst Informed

stakeholders typically do not provide insights or direction, they can operate more effectively in their spheres of responsibility when they know what is going on. The RACI matrix improves project efficiency and effectiveness across the board.

## How to create a RACI matrix for your project

A RACI matrix is simple to create. Follow these four steps to strategically allocate project roles and assignments.

### 1 List key milestones and critical project tasks (not every task from your project plan needs a RACI)

Meet with key stakeholders to identify key milestones, activities, or decision gates within the project. The list should include both deliverables as well as activities like governance. List these project items in order of completion on the left-hand side of the matrix (the y-axis).

### 2 Assign RACI responsibilities

Start with the tasks on the y-axis and take a first pass at allocating responsible, accountable, consulted, informed to each row. Noting it is fine to have multiple R, I and C. There should only be once A in each row.

### 3 Identify key project roles

List the roles (not names of people) who will be involved in some way with your project along the top row (the x-axis) of the matrix. It may be easier to organise these roles by team, division or function. You may be surprised at how many parties need to be engaged to ensure your project is successful.

### 4 Socialise and approve

Once your first pass RACI matrix is completed, highlight any areas you feel uncertain on, or that may be contentious and share the chart with all the project stakeholders and solicit feedback. This process may require several conversations, and mediation between parties to resolve conflicting issues with resource or priority constraints. Once completed, be sure to get final approval on the model from everyone with an R or A next to a task.





## Considerations for an effective RACI

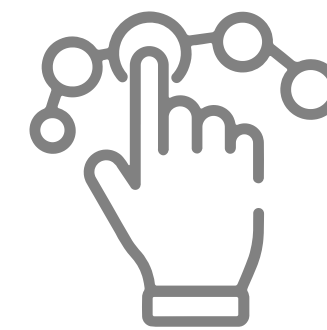
Ensure each task has both a responsible and accountable role assigned to it. That said, too many responsible parties can slow down the process. If you cannot easily reduce them, consider re-designing that milestone or task.



For projects with significant milestones, or stage gates, a Decision column on the x-axis may be added to ensure everyone is aware on which stakeholder holds decision rights to a particular task that is vital to project progress.



Not every milestone, task or activity needs to be consulted or informed. If there are gaps in those columns, this is not necessarily an issue.



### Create a RACI matrix in Compass, Encompass' cloud-based PM tool

Compass encourages RACI completion as part of the portfolio, program, or project commissioning process. Compass makes it easy for project leads to share their RACI with team members, portfolio or program managers and stakeholders, with the click of a button. If you have found this article helpful, or would like more information on Compass, please [click here](#) and we would love to chat it through with you.

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