GRC | essentials

Guideline RACI Method

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What is RACI Method?

The key to good project leadership is involving the right people in the correct way. In order to successfully lead a project team, you need to assign to everyone in the project the right level of access and responsibility. That's where the RACI model comes in. The RACI method enables project managers to assign roles and to create a healthy management environment.

Source: Friedrich, J. (2019). RACI Matrix for better Project Management. AllegraBlog. https://www.trackplus.com/blog/en/raci-matrix/ (accessed 26 October 2021)

Source: Team Strengths Inc. (2018). https://www.teamstrength.com/the-raci-matrix-for-project-accountability/raci/ (accessed 26 October 2021)

So, what does RACI stand for?

Responsible: This team member does the work to complete the task. Every task needs at least one *Responsible* party to complete the assignment, but it's okay to involve more team members. However, be careful to limit as much as possible the number of *Responsible* individuals in order to ensure the role is clear to the rest of the team.

Accountable: This team member is responsible for delegating the workload and is the last one to review the task or deliverable before it's complete. They are not responsible

for doing the work, but for the finalization of the project. On some occasions the *Responsible* team members may also execute the functions of the *Accountable*. Every task must include one *Accountable* team member.

Consulted: Every project is strengthened by review and consultation from more than one team member. *Consulted* team members are matter experts, who provide useful information, suggestions and evaluation of the progress of the task.

Informed: These team members are informed on the tasks and progress of the project.

When it comes to big projects, the large number of tasks, if not appropriately assigned, tend to create a lot of mess and disorientation among the organization. Hence, it is crucial that each task or duty is appointed to different team members to avoid chaos. A RACI chart is a comprehensible form of matrix, used to distribute duties and responsibilities between members of the team. When the team is given a clear map containing the different tasks assigned, it enhances their productivity, eliminates confusion and provides an answer to the question, '*Who's doing what?*'

A RACI chart should be referred to and used throughout the whole project development process in order to keep track of which team members are responsible, accountable, consulting, and informed on tasks and deliverables.

So, what's the difference between Responsible and Accountable?

In the RACI chart, *Responsible* is a task-oriented designation that applies to the person (or people) actually completing the work. A whole team can be responsible for the execution of one task.

Accountable is an outcome-oriented role that applies to a single person who reports on the work, whether in status updates or upon delivery. Being *Accountable* means you must answer for and/or sign off on the deliverable and deal with the consequences if it falls short of goals

When to use a RACI chart?

RACI chart is very handy for projects with many participants. When it comes to relatively small project team, roles are already very clearly defined, or a similar structure has been used successfully previously. In

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this case, you don't necessarily need to define everyone's involvement in every deliverable, but just assign tasks normally. Imposing too much complication to some small and fast-moving projects can actually slow project development and create blockers.

Regarding larger projects with multiple stakeholders, not using a RACI or clearly defining responsibility could result in difficulties and chaos. Furthermore, when roles are not explicitly defined, people are confused with their responsibilities, which affects the final competition of the project. The RACI chart is a pivotal instrument in order to avoid unexpected surprises and too much involvement from stakeholders along the course of the project, slowing down decisions and work, and the project as a whole.

A RACI chart should be used for:

- large-scale projects with clear-cut deliverables or workgroups;
- organizations that have static roles and responsibilities;
- projects with a wide variety of stakeholders for different aspects;
- projects spanning multiple departments;
- projects in highly regulated industries.

During the initial stage of the project, if there is any confusion or questions around who is doing or involved in what, use a RACI to agree on roles and responsibilities upfront.

Advantages of RACI chart.

Using a RACI chart can be particularly effective in the course of a project. Rather than including every single team member in every single decision, you can **_streamline the communication_**, by involving the most adequate people at the correct time, and accelerate decision making. The RACI chart helps to build an efficient communication scheme in projects. Information thus systematically reaches where it is useful, avoiding unnecessary communication

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RACI chart is useful for **avoiding confusion and disorganisation,** by demonstrating who is ultimately accountable for a task's completion**.** The distinction between *Consulted* and *Informed* is beneficial for the fact that there is clear separation between the team members involved in feedback, and those that are only updated on progress on the task.

The RACI chart can be an advantageous tool to **delegate the workload correctly** and avoid Project Manager burn-out. The tasks are distributed correctly - the RACI chart makes it visible when individual employees have been assigned too many or too few tasks. Furthermore, it clearly shows who is responsible for what. This avoids unnecessary discussions and eliminates misunderstandings. Using RACI enables you to ensure than no team members are overloaded with too many *Responsible* tasks.

Creating a RACI chart at the beginning of each project is an effective strategy to **establish standards and expectations** for who is managing or responsible for work going forward. The team members, who are involved in the project should be able to clearly see and comprehend where they need to be involved, and with which tasks. A RACI chart is particularly useful to set expectations with more senior stakeholders who are informed on the project: it will allow them to know what information they will receive as part of the project.

A RACI chart also encourages team members to **take responsibility for their work**—or defer to someone else when needed. In the end, the RACI chart would enable you to eliminate personal judgment and politics from the project development process and focus on the team's ability to act responsibly within a created framework.

Disadvantages of RACI chart.

Some of the main disadvantages of implementing a RACI chart in your project are:

- It can add confusion due to lack of understanding of differences between the roles assigned, especially when it comes to the *Responsible* and the *Accountable*. These roles are quite close in the definition, which can lead to confusion because *Accountable* is the role who's ultimately responsible for the task or deliverable, whilst *Responsible* is the role doing the task;

- It can be time-consuming and complex to create;

- It can be ignored after approval;

- It can add unnecessary complexity to a project;

- It doesn't account for the approval process on tasks or deliverables;

- It can create tension between the *Consulted* and the *Informed*: people assigned with the role of *Consulted* will feel more included and trust that their feedback will be incorporated. Whereas, the *Informed* can feel that they are out of the loop or that their feedback is not being heard. The *Informed* team members will see the deliverable once it's been completed, which should be clearly communicated in the initial stage of the project, in order to avoid problems afterwards.

RACI chart: step by step.

Source: Harned, B. (2021). RACI Charts Explained: Definitions, Example, and Template. Team Gantt. https://www.teamgantt.com/raci-chart (accessed 26 October 2021)

Step 1: Identify Project Roles

This initial phase of the projects consists of determining who will be involved. One useful strategy is to create I create a table listing out the names at the top.

Step 2: Identify Project Tasks

Carefully review the project and break it down into clear tasks and deliverables. Put these down the left-hand column of your

Source: Harned, B. (2021). RACI Charts Explained: Definitions, Example, and Template. Team Gantt. https://www.teamgantt.com/raci-chart (accessed 26 October 2021)

chart. Even if there are more tasks, it is advisable to keep the chart as clear and as simple as possible.

Step 3: Assign the RACI to each role and task

Examine each task and think about the different roles and what they should be responsible for. Every task should have a *Responsible* and *Accountable*. Make sure there is only one role or name assigned to Accountable—this is really important. Think carefully about who should be *Consulted* whilst the task is ongoing, and who should be *Informed* once the task is complete.

	FRODO	SAM	GANDALF	ARAGORN	ELROND
Decide on what to do with ring	C	I	A	C	R
Create Fellowship	R	C	A	C	R
Get the ring to Mount Doom	R	C	A	C	I
Distract and defeat enemies	I	R	C	R	I

Source: Harned, B. (2021). RACI Charts Explained: Definitions, Example, and Template. Team Gantt. https://www.teamgantt.com/raci-chart (accessed 26 October 2021)

Step 4: Agree on the completed RACI with the rest of the team

It is highly significant to concord the RACI chart you have made with your team members. If you haven't gone through roles with your team members, have a quick chat through how you've set up the RACI, and make sure everyone is happy and understanding with their roles and responsibilities on the project.

Step 5: Agree on the RACI chart with the core project stakeholders

Set up a call or meeting to agree on this with the core project stakeholders. Try to keep this conversation as quick and clear as possible to avoid unnecessary and time-consuming discussions

Step 6: Make it useful

One of the biggest issues with documents like a RACI chart is that once it is created, it can easily be forgotten or ignored. So how do you make this a useful, working document?

- When you activate a task, refer back to the RACI and align on who is responsible for what.

- Make sure that what was set out at the beginning of a project, and the roles and responsibilities against tasks, are still accurate.

- At the end if the project, use the RACI to see how the assigned roles and responsibilities worked.

RACI chart: conclusion

Always keep in mind that a RACI chart is not a project plan. A RACI is a useful document as long as it is a joint effort, imlemented since the beginning of a project, and it does suit the project. Make sure you assess the needs of your project at the beginning and make the RACI fit your purpose. Make sure that all team members understand their roles and responsibilities.

Useful tips for an effective RACI chart:

- One *Accountable* per task: when more than one person is working on the project, there could be confusion and disagreement.

- The right amount of people *Responsible*: assigning too many people to the same task would only mean wastage of resources and time.

- Every team member has a role on each task.

Source: Plan Street. RACI Chart Everything you Need to Know. https://www.planstreetinc.com/raci-chart/ https://project-management.com/understanding-responsibility-assignment-matrix-raci-matrix/ (accessed 26 October 2021)

- Do not have too many *Consulted*. Having too many *Consulted* will slow down the task completion.

- To avoid role confusion, the project manager has to determine whether the *Consulted* will only give direction when asked, or whether they will offer direction when they feel it is suitable.

- If you have a lot of *Consulted* and *Informed* roles on your chart, make sure you have an easy way to keep them informed. It could be as simple as making sure everyone has access to your project plan so they can follow progress along the way.

- Keep people informed: you don't need to consult with people, all you need is to inform them. Ensure that you have people in this role, or else you could have problems, such as lack of team collaboration.

- The RACI chart should not be misunderstood as a control tool. It does not serve to fix a dysfunctional team - it simply improves communication flow in a cohesive group. The RACI chart should be integrated with regular project planning

- The tasks in the chart must be clearly and comprehensibly formulated and the scope of a task must be clear.

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RACI chart example.

RACI matrix.

	R	Responsible
	A	Accountable
	C	Consulted
	I	Informed

Project tasks	Product Owner	Business Analyst	Financial Lead	Design Director	Design Lead	CRM Lead	Head of CRM	Senior Stakeholders*	Senior Stakeholders**	AGENCY
1. Research										
Econometric model	C	C	A	I	I	C	I	C	I	R
Strategic framework	A	C	C	I	I	C	I	C	I	R
2. Define										
Product concept	A	C	I	C	I	C	C	C	I	R
User testing	A	C	I	I	I	C	I	I	I	R
User journey	A	C	I	I	I	C	I	C	I	R
Design framework	C	C	I	R	A	I	I	C	I	R
Technology recommendations	C	A	I	I	I	I	I	C	I	R
Measurement framework	R	C	A	I	I	C	I	C	I	R
Product backlog	A	R	I	C	I	C	I	C	I	C
Delivery roadmap	A	R	I	R	C	C	I	C	C	R

*Senior Stakeholder 1, Senior Stakeholder 2, Senior Stakeholder 3, Senior Stakeholder 4
** Senior Stakeholder 5, Senior Stakeholder 6, Senior Stakeholder 7, Senior Stakeholder 8

Source: Haworth, S. (2021). RACI Chart Template For Project Managers + Example & How To. DPM. https://thedigitalprojectmanager.com/raci-chart-made-simple/ (accessed 26 October 2021)

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Co-funded by the Erasmus+ Programme of the European Union

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