

Let's Get RACI—Matrix That Is

What is a RACI Matrix? A RACI Matrix is a tool that helps to systematically clarify relationships pertaining to:

1. Departmental or functional roles
2. Actions required to deliver a product or service
3. Participation expectations

RACI stands for **R**esponsible, **A**ccountable, **C**onsult, and **I**nforn.

The RACI Matrix is a tool to use for role and responsibility charting. Consider using a RACI Matrix when:

1. Defining roles and responsibilities of team members on a project
2. Improve understanding of roles and responsibilities around work process (for example "as is" and "to be" processes)
3. Clarify roles and responsibilities within a department

Managers are not always accountable for everything in their organization. Charting ensures accountability is placed with the individual that is accountable for specific work. Charting helps eliminate role confusion, a particularly useful outcome when quick decisions need to be made or to keep work tasks bouncing from individual to individual. Aside from being useful for project work, charting is also helpful to clarify roles within a department. At times there are three separate views -- what a person thinks is his/her job responsibilities, what others in the organization think is his/her job responsibilities, and what the job responsibilities actually are. A RACI Matrix clarifies the picture.

Let's further define the charting definitions before discussing the charting process.

Responsible. Assign this to the individual(s) who completes the task. More than one person can be responsible. The degree of responsibility is determined by the individual with the **A**.

Accountable. This is the owner of the work or "the buck stops here" individual that is ultimately answerable for the work.

Consult. These individuals are consulted with on the work prior to any final decision or action. Input is required from the **C**'s.

Inform. After a decision/action is taken this is the individual to be informed of that decision. This individual may need to take some action as a result of the decision/action taken.

The RACI Matrix sample illustrates how a chart might look. Notice the roles across the horizontal axis and the tasks listed on the vertical access.

RACI Matrix Sample

| Decisions/ Activities | Roles | | | |
|--------------------------|-----------------|-----------|-------------|-------------|
| | Project Manager | Team Lead | Team Member | Stakeholder |
| Create Project Plan | R | C | C | A |
| Update Milestones | R | R | C | A |
| Perform Task A | C | R | R | A |
| Run Report A | I | C | R | A |

Responsible
Accountable
Consult
Inform

Role and responsibility charting is easy to do if you establish a process for the chart's creation. The steps below are a suggested process to follow:

1. Identify work process.
 - Start with high impact areas
 - Don't chart processes that will soon change
 - Work processes must be well defined

2. Determine the activities to chart.
 - Be specific and use action verbs
3. List the roles involved in the task.
 - Roles are better than individual names so the chart would still be valid if new people filled the roles
4. Develop the RACI Matrix.
 - It is easier to assign the **R**'s first then determine who has the **A**'s. Finish up with the **C**'s and **I**'s.
5. Get feedback.
 - Distribute the chart to everyone represented on the chart.
 - Capture changes and revise

Keep the matrix updated on an ongoing basis to reflect any changes that occur.

After the matrix is revised, and before it is redistributed, it is wise to perform some analysis to ensure workloads are balanced; responsibilities are not spread too widely, and look for other factors that might interfere with getting work accomplished.

In next month's newsletter we will use our RACI Matrix sample to show how to conduct a vertical and horizontal analysis of the RACI Matrix and actions to take as a result. We will finish this subject with some RACI closing guidelines.