

SETTING UP AN ACCOUNTABILITY MATRIX

What is an Accountability Matrix?

An accountability matrix maps out every task, milestone, and key decision involved in completing a project. A RACI model is easy to set-up and is used to keep track of duties and keep everyone involved accountable.

RACI is an acronym:

RESPONSIBLE

This is the person who will complete the task or process.

ACCOUNTABLE

This person is ultimately accountable for the task or process.

CONSULTED

People that are consulted in order to be able to complete the job (often subject matter experts).

INFORMED

People that need to be aware of the progress and/or receive output from the task or process.

THINGS TO KEEP IN MIND WHEN SETTING UP YOUR RACI CHART

- At least one person must be responsible for a deliverable, activity, or task.
- Multiple people can be responsible for a deliverable, activity, or task, but only one person can be accountable.
- The same people can be responsible and accountable.
- You may want to fill in the chart with job titles or functions instead of employee's names. This way, the task is not tied to a specific person but rather a role.

You are ready to set up your own chart! Think through the following questions. There is space provided below to record your answers.

1. What is the overall goal of the project?

2. What is the timeline by which this goal should be completed?

3. List all the individual tasks you can think of that will need to be completed in order to accomplish this goal.

4. Who is responsible for each task?

5. Who is accountable for each task?

6. Who, if anyone, needs to be consulted on each task?

7. Who, if anyone, needs to be informed on each task?

Create a table (you can use Microsoft Word, Excel, or another application of your choice) with 5 columns and enough rows to be able to enter in every phase/task of the project. Populate it with information from your answers above. Here is a sample table you can use as a guide:

Define Initial Phase	Project Manager	Project Sponsor	Project Analyst	Technical Analyst
Define Project Phase	R	A	C	I
Define the Scope	R	A	C	I
Define Project Deliverables	A	C	R	C
Define Shareholder Matrix	A	C	R	C
Define Governance Structure	R	A	C	I
Define the Implementation Approach	A	C	R	C
Define Risks and Issues	A	I	R	C
Project Charter	R	A	C	I

Once you have completed the chart, complete this checklist to make sure you have completed all necessary steps:

- ☐ Identify everyone who needs to be involved in the project.
- ☐ Break the project up into all necessary tasks and deliverables. Assign RACI to each task.
- ☐ Share the matrix with your team. Get their input to make sure all your assumptions were correct, and make adjustments as necessary.
- ☐ Share the matrix with stakeholders. Again, incorporate any input, as appropriate.
- ☐ Use it! Don't just make the matrix and forget about it. Refer back to it often and make sure everyone is staying on track. Update it on an ongoing basis as circumstances change.