

ABCs of Project Management - Roles Definition

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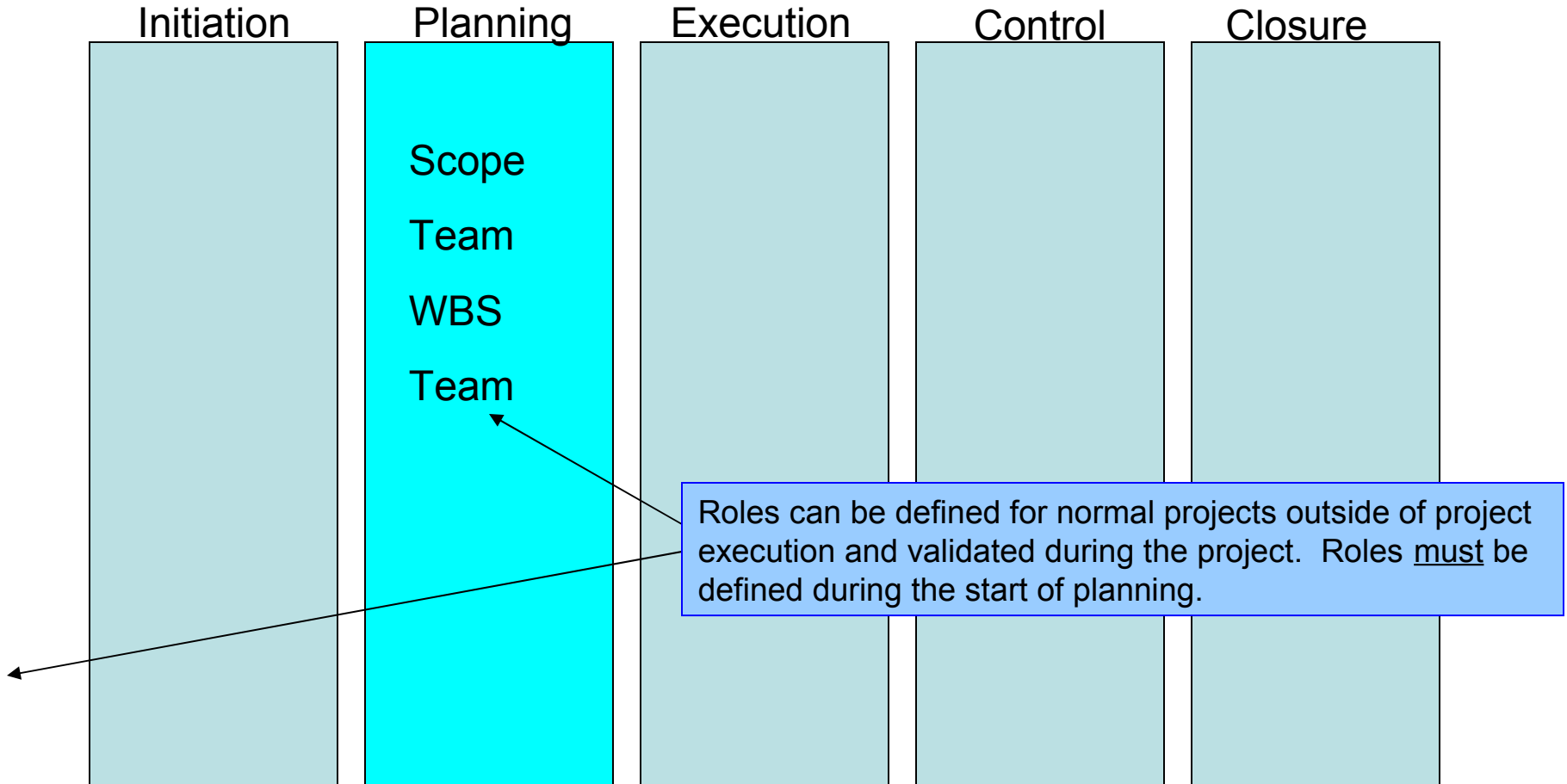


Overview

- When do you define project roles?
- Why formally define the project roles?
- How do we define project roles?
- Normal projects approach
- Abnormal projects approach
- Roles and Responsibilities matrix using a RACI chart and documents
- More information



When do you define project roles?





Why formally define the project roles?

- Clarifies expectations on the project
 - Assures that WBS deliverables are covered
 - Assures that ownership / leadership roles are understood
 - Helps teams understand what others do
 - Helps identify where training might be needed
-



How do we define project roles?

- Take job descriptions from HR or other projects
- Assure that language is clear and relevant to the project
- Assure that the responsibilities are not duplicated
- Define common responsibilities for all team members
- Align roles and responsibilities with project and product deliverables
- Review with team members



Normal Projects approach

- When projects are “normal” or performed regularly or repeatedly
 - Roles definitions can be reused from other projects or current organizational definitions
 - Review with project resources (possibly as a group)
 - Develop training plans with resource managers
 - Adjust fit and fill in gaps



Abnormal Projects approach

- When project are not “normal”, working with a new group or resources are new to projects
 - Take extra care to match roles with deliverables
 - Review with project resources; possible signoff
 - Look for areas of conflict and resolve
 - Work with resources and resource managers for training plan development
 - Assure alignment with senior management
 - Assure alignment with customers (do you define roles the same way?)



Roles matrix using a RACI chart and documents

List the roles and the names in each role.

Name your project and product deliverables by phase

Define for each deliverable who:

[R]esponsible

[A]pproves

[C]onsulted

[I]nformed

Start by Assigning the responsible party (R) and have them develop information for the remainder of the deliverable .



RACI Example

From PMI Region 2 Collaboration project

| DELIVERABLE | Assessment | Project Charter | Project Roles and Responsibilities | Project Schedule | Communication Matrix | Deliverable_RACI Chart | Team Orientation Guide | eProject Configuration Survey | Centers of Excellence Strawman | Operation Roles and Responsibilities | Conversion Plan | Training Plan | Testing Plan | Rollout Plan | Configuration Layout | Configuration | eProject Templates | Centers of Excellence Templates | Naming Guidelines | Content Change Management Approach | Content Quality Standards | Support Procedures | Training Materials | Final Product |
|--|------------|-----------------|------------------------------------|------------------|----------------------|------------------------|------------------------|-------------------------------|--------------------------------|--------------------------------------|-----------------|---------------|--------------|--------------|----------------------|---------------|--------------------|---------------------------------|-------------------|------------------------------------|---------------------------|--------------------|--------------------|---------------|
| Project Lead - Mark S. | C | R | R | C | RA | A | RA | A | R | C | C | C | C | C | I | I | I | A | A | A | R | C | C | R |
| Co-project Lead - Michelle B. | R | C | C | R | C | R | I | R | I | I | I | RA | C | C | A | A | A | I | I | C | A | A | R | C |
| Administrator - Sharon P. | | | | | C | C | I | C | I | I | I | C | A | A | R | R | C | I | I | I | I | R | C | C |
| Small Chapter Leader - Michael M. | | | | | C | C | I | C | I | I | I | C | R | R | C | C | C | I | I | I | I | C | C | C |
| Medium Chapter Leader - Lorna W. | | | | | C | C | I | I | C | C | R | C | I | I | I | I | I | C | R | C | C | C | I | C |
| Large Chapter Leader - Bob E. | | C | C | C | C | C | I | C | I | I | I | C | C | C | C | C | R | I | I | I | I | C | C | C |
| Large Chapter Leader - John H. | | | | | C | C | I | I | C | R | C | C | I | I | I | I | I | R | C | R | C | C | I | C |
| Presidents Committee | A | A | A | A | I | | | | A | | I | I | | | A | A | | | | | | | I | A |
| Component Mentor | I | I | I | I | I | I | | I | I | A | A | I | C | C | I | I | | | | I | I | I | I | C |
| Status | | | | | | | | | | | | | | | | | | | | | | | | |
| Legend: R = Responsible, A = Accountable for Approval, C = Consulted/Supportive, I = Informed | | | | | | | | | | | | | | | | | | | | | | | | |
| Color Code | | | | | | | | | | | | | | | | | | | | | | | | |
| On track | | | | | | | | | | | | | | | | | | | | | | | | |
| Material Issues or concerns | | | | | | | | | | | | | | | | | | | | | | | | |
| Behind Schedule | | | | | | | | | | | | | | | | | | | | | | | | |
| Complete | | | | | | | | | | | | | | | | | | | | | | | | |

Note: This slide has been transposed from the previous slide description to fit easier on slide.



Responsibility Example

- **Executive Sponsor:**
 - Provides strategic direction, vision and goals to project
 - Champions the project within the corporation as it vies for corporate resources
 - Represents the project across organization boundaries
 - Communicates key project information and status to members of the Executive Management Team, as needed
- **Project Sponsor:**
 - Provides tactical direction, vision and goals to project
 - Works closely with the Project Manager to assure project progresses as planned
 - Accountable for business decisions and resolution of issues that get elevated from the Project Manager and/or Steering Committee
 - Participates on project Steering Committee
 - Champions the project within the corporation as it vies for corporate resources
 - Represents the project across organization boundaries
 - Communicates key project information and status to members of the Executive Management Team, as needed (*Note: Delete this item if project has a separate Executive Sponsor*)



Contact US



We provide people and organizations with structure ways to realize opportunities, solve problems and manage more efficiently. We do this through Process, Project and Control Management science.

All questions, comments, improvement ideas or requests for additional information can be directed to:

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