

Using the RACI Decision Matrix

While there are a variety of decision matrices out there, the one we consistently introduce to our clients is called the RACI. The RACI serves as a means of “pressure testing” the choices that we’ve made in our role charters, helping us to further define how our decision play out in the execution of an actual business process.

For example, if we make a choice in our role charters to say that Marketing will redefine the way it engages the field in informing and vetting the content it produces, then the RACI pushes the functional leaders to define, end-to-end, what that process looks like: what the key steps are, where the handoffs and partnerships are, and at exactly what point in the development stage the Field is engaged. In other words, it helps us to think through how we operationalize our choices.

Here is how the RACI works.

1. We begin by documenting the key steps in a process (in this case, you might say the process of developing marketing materials with the full participation of the field).
2. We create a grid, and along the left-hand vertical of the grid, we list out those process steps.
3. Along the top of the grid, we list out each function that will play any role in this process (which may include customers if we choose to vet ideas with them at any point, Alan if we want his approval at any point, etc.).
4. Then, going step-by-step through this process, the leaders (based on decisions made in the Role Charters) assign roles in each process step. Each

role is represented by one of the following 4 letters: RACI **Responsible (R)**: The person who *does the work* to achieve the task. They have responsibility for getting the work done or decision made. As a rule this is one person; examples might be a business analyst, application developer or technical architect. **Accountable (A)**: The person who *is accountable for the correct and thorough completion* of the task. This must be one person and is often the project executive or project sponsor. This is the role that responsible is accountable to and approves their work. **Consulted (C)**: The people who *provide information* for the project and with whom there is two-way communication. This is usually several people, often subject matter experts.

Informed (I): The people *kept informed* of progress and with whom there is one-way communication. These are people that are affected by the outcome of the tasks, so need to be kept up-to-date.

A few guiding principles include:

- Every process step must have an A and an R
- Each step may have only one A
- The A must have the authority to be accountable
- The number of C's and I's should be kept to a minimum as they can bottleneck the decision-making process. Each should be able to add a unique and specific value to the process.
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A sample RACI grid might look like this: Process: Construction of a family's new home ...

	Family	Bank	Contractor	Architect	Plumber	Electrician	Inspector
Choose location	A/R						
Get financing	A/R	R					
Engage architect	A/R			I			
Engage contractor	A/R		I				
Develop plans	C/I			A/R			C
Build house	A		R	R			C
Install plumbing	I		A		R		C
Install electric	I		A			R	C
Pass inspection	I		A				R