



**Your Company Name**

# **Roles and Responsibilities Matrix**

Date

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## Revision History

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Date	Version	Author	Change

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*Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select “Table Text” to restore the cells to the default value.*

## **1 Purpose**

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This document provides information for creating a Project Roles and Responsibilities Matrix, which can be created in a table or spreadsheet form.

The Matrix displays key project activities and details the responsibilities for each individual or role in the project across every major functional department.

The responsibility matrix lays out the major activities in the project and precisely details the responsibilities of each stakeholder involved in a project. It is an important project communication tool because all stakeholders can see clearly who to contact for each activity.

Projects vary in size, type, and organization.

- Small Projects: Generally no organizational structure is needed. It could include a project sponsor, project manager, and team members.
- Large Projects: Generally a more organized structure where team members understand their roles and responsibilities

## **2 Setting Up a Responsibility Matrix**

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This section provides information to setup a roles and responsibility matrix.

- List key project activities or tasks (in table / matrix rows).
- List key individuals or work groups (in table / matrix columns).
- Indicate key involvement or authority for each work group / individual, e.g., approve, review, create, or provide input.
- Ensure the original and on-going changes to the roles and responsibility matrix is approved.



## 2.1 Sample Matrix Roles and Responsibilities Descriptions

Roles	Description
<b>Analyst</b>	<p>Primary liaison between technical areas, business partners or other project groups. The Analyst gains an understanding for current and future processes, documents business client requirements prior to developing and implementing solutions, and identifies costs, benefits, risks, and constraints.</p> <p>Note: This individual is often called a Business Analyst, Business Systems Analyst, Systems Analyst or a Requirements Analyst.</p>
<b>Change Control Group</b>	The Change Control Group is generally composed of individuals authorized to approve changes to the project requirements, budget, and schedules.
<b>Client</b>	Project or service customers (individuals or groups).
<b>Client Project Manager</b>	Large projects can also have a primary business contact on the same level as the project manager representing the Information Technology organization.
<b>Designer</b>	The Designer reviews the business requirements and architecture and designs a solution to meet the business needs. Designer results are passed to development staff to build the solution based on the design specifications.
<b>Functional Manager</b>	Ensures project tasks are completed with resources under the manager's control within scope, time, budget, and quality constraints.
<b>Governance Board</b>	Executive Team in the organization that reviews projects to ensure they are meeting enterprise goals.
<b>Performing Organization</b>	Generally the sponsoring project organization whose personnel are most directly involved in doing the project work.
<b>Program Manager</b>	Individual in charge of management of a program (group of related projects) to achieve its objectives and benefits.
<b>Project Management Office</b>	A group or entity with responsibilities to manage those programs and projects under their responsibility.
<b>Project Manager</b>	The individual assigned to complete the project's objectives by coordinating and integrating activities across multiple functional lines, and managing stakeholder communications. The project manager also manages the project scope, time, cost, and quality.
<b>Project Stakeholders</b>	Individuals or groups that are actively interested (or have a stake) in the outcome of the project through its execution or implementation. They could be internal clients, management, employees or external stakeholders.



Roles	Description
<b>Project Team</b>	The project team includes full-time and part-time resources to work on project deliverables. These individuals could be from one organization or from a cross-functional team where members are from multiple organizations.
<b>Project Team Leader</b>	This individual ensures project tasks and assignments are completed on time, on budget, and within quality standards The individual knows the strategic and operational issues.
<b>Sponsor (Executive Sponsor and Project Sponsor)</b>	<p>Provides clarity of the project vision, and directs the activities of the project team. Allocates funding and resources to the project. Provides executive authority necessary to overcome organizational obstacles and barriers. They also champion the project within their organization and are guardian of the business case, and ultimately responsible for project success.</p> <p>This person has authority over the project. The Executive Sponsor provides project funding, resolves issues and scope changes, approves major deliverables and provides high-level direction.</p>
<b>Steering Committee</b>	A group of high-level stakeholders that set the strategic vision and objectives for a program or project. The team helps to build consensus through the organization to support the project or program's objectives. They do not take the place of a Sponsor, but help to spread the strategic input and buy-in.
<b>Suppliers / Vendors</b>	Groups within an organization or outside subcontractors that work with your direction, or supply material, equipment, hardware, software or supplies to your project.
<b>Technical Manager / Liaison</b>	Ensures project implementation is technically consistent with the overall technical strategy of the enterprise and on track with project requirements, quality targets, and budgetary constraints, and timelines.
<b>Users</b>	Individuals or groups that use the project deliverables and may be involved in project activities, e.g., defining business requirements and performing user acceptance testing (UAT).



### 3 Roles and Responsibility Matrix

The purpose of the Roles and Responsibility Matrix is to provide a clear understanding and agreement on who does what on a project. It can be displayed with individuals or groups responsible for performing specific functions or tasks. The matrix should then be distributed for approval after its completion.

The Matrix is a method used to designate the responsibilities for each project role. It can be used to communicate Team Member roles, which help set expectations and ensure individuals know what is expected.

#### 3.1 Standard Roles and Responsibility Matrix

*The following table illustrates a sample Roles and Responsibility matrix using an “ x “ in the department column intersecting with the respective project function.*

Function / Responsibility	Department A	Department B	Department C
<i>Business Case Study</i>	X		
<i>Feasibility Study</i>	X		
<i>Cost / Benefit Analysis</i>	X		
<i>Project Approval Document</i>	X		
<i>Project Charter</i>	X		
<i>Functional Requirements</i>	X		
<i>Technical Requirements</i>	X		
<i>Requirements Traceability Matrix</i>		X	
<i>Project Plan</i>		X	
<i>Training Plan</i>		X	
<i>System Design Document</i>		X	
<i>Process Guide</i>		X	
<i>Installation Guide</i>		X	
<i>Software User Guide</i>		X	
<i>System Administrators Guide</i>		X	
<i>Technical Test Plan</i>			X
<i>User Acceptance Test Plan</i>			X
<i>Product Acceptance Document</i>			X



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Function / Responsibility	Department A	Department B	Department C
<i>Production Turnover Maintenance</i>			X
<i>Modification Request</i>			X
<i>Product Retirement Plan</i>			X

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### 3.2 RACI Roles and Responsibility Matrix

The following Roles and Responsibility Matrix uses the “RACI” concept to specify who does what. It provides more information as to who approves it, reviews it, creates it, and provides input to it.

- R - Reviews the deliverable (and provides feedback).
- A - Approves the deliverable.
- C - Creates the deliverable (could be C (1) for primary, C (2) for backup). Usually there is only one person responsible for creating a deliverable, although many people may provide input.
- I - Provides input.
- N – Is notified when a deliverable is complete.

*Example responsibility codes are shown in the following table. Your project may define different codes. Explain what they mean so that people will know what the expectations are.*

Function / Responsibility	Sponsor	Project Manager	Team	Managers	Analysts
<i>Business Case Study</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>A</i>	<i>C</i>
<i>Feasibility Study</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>A</i>	<i>C</i>
<i>Cost / Benefit Analysis</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>A</i>	<i>C</i>
<i>Project Approval Document</i>	<i>A</i>	<i>C</i>	<i>R</i>	<i>A</i>	<i>R</i>
<i>Project Charter</i>	<i>A</i>	<i>C</i>	<i>R</i>	<i>A</i>	<i>R</i>
<i>Functional Requirements</i>	<i>I, A</i>	<i>I, A</i>	<i>R</i>	<i>I, A</i>	<i>C</i>
<i>Technical Requirements</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>I, R</i>	<i>C</i>
<i>Requirements Traceability Matrix</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Project Plan</i>	<i>A</i>	<i>A</i>	<i>R</i>	<i>A</i>	
<i>Training Plan</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>System Design Document</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Technical Design Document</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Process Guide</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Installation Planning Guide</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Software User Guide</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>System Administrators</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>



Function / Responsibility	Sponsor	Project Manager	Team	Managers	Analysts
<i>Guide</i>					
<i>Operations Guide</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Technical Test Plan</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>User Acceptance Test Plan</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>A</i>	<i>C</i>
<i>Product Acceptance Document</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>A</i>	<i>C</i>
<i>Production Turnover Approval</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>A</i>	<i>C</i>
<i>Project Feedback Analysis</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Modification Request</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>
<i>Product Retirement Plan</i>	<i>R</i>	<i>A</i>	<i>R</i>	<i>R</i>	<i>C</i>

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