

ROLES AND RESPONSIBILITY MATRIX

Clarify who does the work, who owns the outcome and who needs to be involved. Apply this RACI worksheet to one workflow or project, then agree on the responsibilities with the people named.

START HERE >>>

1 Choose the scope

List the activities and decisions that matter, including approvals, exceptions and handovers. Use the workflow map to identify where ownership is unclear.



2 Name roles and the people filling them

Use role titles in the matrix and record the current role holders separately. One person may hold several roles in a small business.



3 Allocate responsibility

Assign at least one Responsible role and exactly one Accountable role per row. A single role may be both, shown as A/R. Consult people whose input is required and inform those affected.



4 Resolve overlaps and missing authority

Check that accountability comes with decision authority and capacity. Agree delegated approval limits, backups and escalation routes.



5 Agree and review

Walk through a normal case and an exception. Obtain agreement, communicate the matrix and review it when people or processes change.



USE THE RACI KEY

R Responsible — performs the activity.

A Accountable — owns the outcome and final decision.

C Consulted — provides input before action or decision.

I Informed — receives the outcome.

A blank means no routine involvement.

WORKED EXAMPLE

Illustrative construction business workflow. Replace these roles and allocations with your agreed operating model.

Activity or decision	Director	Estimator	Project manager	Finance
Prepare quotation	A	R	C	I
Approve price exception	A/R	C	C	I
Confirm delivery plan	I	C	A/R	I
Compile variation scope	I	C	A/R	C
Approve commercial variation	A	C	R	C
Issue invoice	I		C	A/R

BUILD YOUR MATRIX

Activity or decision	Role 1	Role 2	Role 3	Role 4

TAKE THE NEXT STEP

SMD Consulting can help map workflows, clarify accountability and develop a practical improvement roadmap.

smdconsulting.com.au
M: 0450 100 052

This guide is a planning aid and should be adapted to suit your business's operations, needs and objectives.