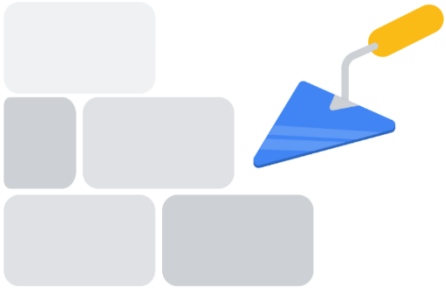
Review: The building blocks of a project dream team

In the previous video, we explored some considerations for choosing your project team and assigning their roles and responsibilities. Let's recap what you learned and expand upon what to think about when building your project team.



Too big, too small, or just right?

Once you lay the foundation for your project by outlining your goals and expectations, it is time to build your dream team! Though before we can build our dream team, we need to figure out how many people we need. This number will largely depend on the size of the project itself. Complex projects with large divisions of work will usually require larger project teams. Simple projects with straightforward expectations may only require a few people on the project team. As a project manager, it is your job to help find the right balance based on what is needed.

The right skills and abilities to fill the role

Multiple roles exist in every project. On smaller teams, multiple roles may be filled by one person. To meet the needs of more specialized projects, project managers might require people who have the necessary **technical skills.** Technical skills are the skills specific to the task that needs to be performed. For example, on the Office Green project, necessary technical skills may include indoor landscaping design for the layout of the plants within the offices and floral design of plant arranging.

Technical skills are highly valued, but they are not the only skills that are important for high functioning teams. Interpersonal skills, also known as people skills or soft skills, such as patience and conflict mediation, can help team members. This allows the team to blend their technical expertise with collaborative skills in order to get the job done. When a team applies their interpersonal skills, they can minimize team-related issues.

Problem-solving skills are a must for all team members, especially when it comes to large, complex projects. As a project manager, you will not be able to solve every problem for your team. At some point, they will need to use their own judgment to problem-solve and get the work done.

An underrated skill set for project team members are **leadership skills.** Strong leadership skills help team members navigate organizational boundaries and effectively communicate with stakeholders to generate buy-in.

Who is available?

In projects, the availability of your team is always a big concern. This is especially true in Matrix organizations, where team members have multiple bosses. It is not uncommon to pull a team member onto another project before your project is complete. In a perfect world, you only pick those who can stay on the project for its entire life cycle. You may find that you don't get to pick certain members of your team at all, which is called a pre-assignment. In these cases, the sponsor assigns team members to your project.

Keep in mind that you need to value diversity early on when building your team. On diverse teams, everyone is able to use their unique professional and personal experiences to contribute to a more successful project. Diversity is best leveraged when it is acknowledged and highlighted as an asset. Many people avoid discussing their differences, but if you encourage those conversations, you will find a richer understanding and greater creativity that comes from people working together across identity differences. To do this effectively, it is important to dedicate time early on in the team building process to develop trust between team members. Team members who understand one another are more likely to trust each other and feel safe sharing different points of view or offer a competing perspective. This will also allow them to more easily offer constructive feedback or be supportive if the team dynamics face challenges at any point.

What motivates them?

Be sure to take note of the motivation level of your team members and the impact it may have on your project. Just because a person is pre-assigned to a project, doesn't necessarily mean they have low interest in it, but a person who proactively volunteered for it may have additional motivation to do the work.

As a project manager, it is your responsibility to engage your team and keep them motivated. This is where your influence as a leader is required to keep the team engaged and ready to overcome any obstacles that may appear. Engaging in a respectful manner and maintaining a positive outlook with your team during times of adversity are simple ways to keep your team motivated.

Essential project roles

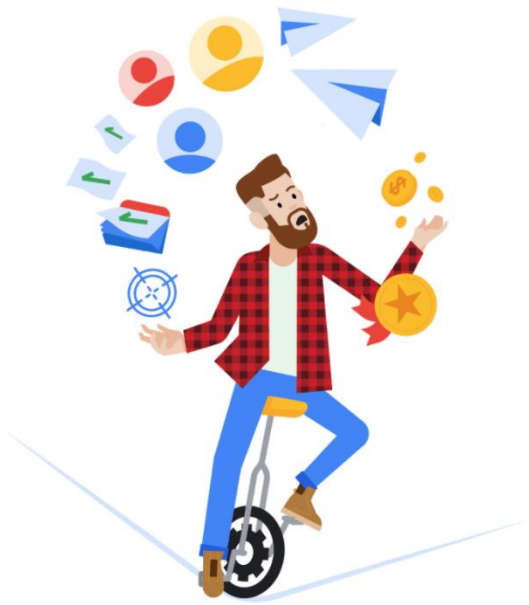
In this lesson, you are learning to define project roles and responsibilities. Let's now build on what you have learned about building your project team and focus on how to further identify the core roles and responsibilities that are critical to any project.

The project manager

Although all team members are responsible for their individual parts of the project, the project manager is responsible for the overall success of the team, and ultimately, the project as a whole. A project manager understands that paying close attention to team dynamics is essential to successfully completing a project, and they use team-building techniques, motivation, influencing, decision-making, and coaching skills, to keep their teams strong.

Project managers integrate all project work by developing the project management plan, directing the work, documenting reports, controlling change, and monitoring quality.

In addition, project managers are responsible for balancing the scope, schedule, and cost of a project by managing engagement with stakeholders. When managing engagement with stakeholders, project managers rely on strong communication skills, political and cultural awareness, negotiation, trust-building, and conflict management skills.



Stakeholders

Have you ever heard the phrase “the stakes are high"? When we talk about “stakes,” we are referring to the important parts of a business, situation, or project that might be at risk if something goes wrong. To hold stake in a business, situation, or project means you are invested in its success. There will often be several parties that will hold stake in the outcome of a project. Each group’s level of investment will differ based on how the outcome of the project may impact them**.** Stakeholders are often divided into two groups: **primary stakeholders,** also known as key stakeholders, and **secondary stakeholders.** A primary stakeholder is directly affected by the outcome of the project, while a secondary stakeholder is indirectly affected by the outcome of the project.

Primary stakeholders usually include team members, senior leaders, and customers. For example, imagine that you are a project manager for a construction company that is commissioned to build out a new event space for a local catering company. On this project, the owners of the catering company would be primary stakeholders since they are paying for the project.

Another primary stakeholder could be the CEO of your construction company. If the CEO likes to be directly involved with projects for local businesses like the catering company, that would make them a primary stakeholder.

An example of a secondary stakeholder might be the project’s point of contact in legal. While the project outcome might not affect them directly, the project itself would impact their work when they process the contract. Each project will have a different set of stakeholders, which is why it’s important for the project manager to know who they are, what they need, and how to communicate with them.

Project team members

Every successful team needs strong leadership and membership, and project management is no exception! Project team members are also considered primary stakeholders, since they play a crucial role in getting the job done. Your team members will vary depending on the type, complexity, and size of the project. It’s important to consider these variables as you select your project team and begin to work with them. Remember that choosing teammates with the right technical skills and

interpersonal skills will be valuable as you work to meet your project goals. If you are not able to select your project team, be sure to champion diversity and build trust to create harmony within the team.

Sponsor

The **project sponsor** is another primary stakeholder. A sponsor initiates the project and is responsible for presenting a business case for its existence, signing the project charter, and releasing resources to the project manager. The sponsor is very important to the project, so it's critical to communicate with them frequently throughout all project phases. In our construction company example, the CEO could also be the project sponsor.

In this lesson, you are learning to complete a stakeholder analysis and explain its significance. Let's focus here on how to prioritize the various types of stakeholders that can exist on a project, generate stakeholder buy-in, and manage their expectations.

Conducting a stakeholder analysis

Stakeholders are an essential part of any project. A project manager's ability to balance stakeholder requirements, get their buy-in, and understand when and how to involve them is key to successfully fulfilling a project.

It is key to keep stakeholders organized in order to understand when and how to involve them at the right time. In an earlier video, we introduced the **stakeholder analysis,** a useful tool that project managers use to understand stakeholders' needs and help minimize hiccups during your project life cycle.

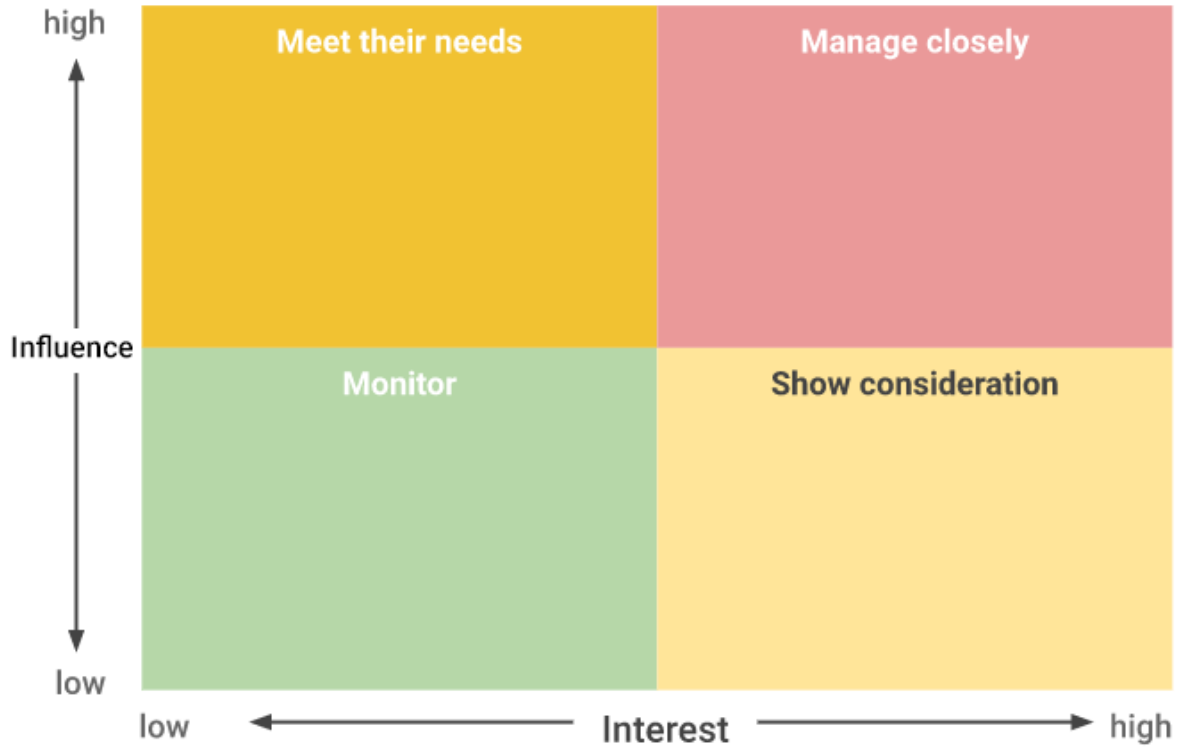
Let's review the key steps in the stakeholder analysis:

1. Make a list of all the stakeholders the project impacts. When generating this list, ask yourself: Who is invested in the project? Who is impacted by this project? Who contributes to this project?
2. Determine the level of interest and influence for each stakeholder—this step helps you determine who your key stakeholders are. The higher the level of interest and influence, the more important it will be to prioritize their needs throughout the project.
3. Assess stakeholders' ability to participate and then find ways to involve them. Various types of projects will yield various types of stakeholders—some will be **active stakeholders** with more opinions and touchpoints and others will be **passive stakeholders,** preferring only high-level updates and not involved in the day-to-day. That said, just because a stakeholder does not participate as often as others does not mean they are not important. There are lots of factors that will play a role in determining a stakeholder's ability to participate in a project, like physical distance from the project and their existing workload.

Pro tip: You might want to form a **steering committee** during some projects. A steering committee is a collection of key stakeholders who have a high level of power and interest in a project. A steering committee can influence multiple departments within the organization, which means that they have the potential to release a greater number of resources to the project manager.

Visualizing your analysis

A **power grid** shows stakeholder interest *in* the project versus their influence *over* the project. This four-quadrant tool helps project managers evaluate how to manage their stakeholders. It is used to determine the appropriate level of engagement required by the project team needed to gain the stakeholders' trust and buy-in. The upper half of the grid represents higher influence, and the lower half of the grid represents lower influence. Meanwhile, the left half of the grid represents lower interest, and the right half of the grid represents higher interest. With that in mind, you'll find the upper left quadrant to be labeled "meets their needs," the upper right quadrant "manage closely," the bottom left quadrant is labeled "monitor," and the bottom right quadrant is labeled "show consideration."



Take the time at the start of the project to establish your stakeholder approach. List the stakeholders and then place them into the appropriate places on the grid. Being able to visualize their placement will help you manage communications and expectations. Having a quick reference tool to drive your communication actions will also allow you to have the ability to spend more time doing other tasks on your project.

To break it down further, here is the meaning of each quadrant:

Quadrant 1: High Influence, High Interest

Stakeholders in this quadrant have a significant influence on the project and are highly interested in its outcome. They can greatly impact project decisions and success. Examples might include project sponsors, key executives, or regulatory authorities. Responses for this quadrant include:

1. **Engagement and Involvement:**
    - Keep these stakeholders well-informed and engaged throughout the project lifecycle.
    - Involve them in decision-making processes, seeking their input and feedback.
    - Address their concerns promptly and effectively.
2. **Regular Communication:**
    - Schedule regular meetings or updates to keep them informed about project progress and any issues.
    - Tailor communication to their preferences and needs to ensure they remain supportive and engaged.

Quadrant 2: High Influence, Low Interest

Stakeholders in this quadrant have high influence but may not be deeply interested in the day-to-day project details. They might include senior managers who need to be informed but may not be actively engaged. Responses for this quadrant include:

1. **Executive Summaries:**
    - Provide high-level summaries of project progress and key decisions for their review.
    - Focus on the impact of the project on organizational goals and objectives.
2. **Periodic Updates:**
    - Provide periodic briefings or updates to ensure they are informed of major milestones and critical project changes.

Quadrant 3: Low Influence, High Interest

Stakeholders in this quadrant have a high interest in the project but relatively low influence on its outcome. They are typically looking for updates and information about the project. Responses for this quadrant include:

1. **Regular Updates:**
    - Communicate project progress, risks, and updates to keep them engaged and informed.
    - Address their queries and concerns promptly to maintain their interest.
2. **Stakeholder Feedback:**
    - Seek their feedback on project plans, progress, and outcomes to ensure their perspective is considered.

Quadrant 4: Low Influence, Low Interest

Stakeholders in this quadrant have low influence on the project and limited interest in its details. They might include lower-level employees or departments not directly impacted by the project. Responses for this quadrant include:

1. **General Communication:**
    - Share general updates about the project's overall progress without overwhelming them with details.
    - Address any specific questions they may have, but avoid unnecessary inundation with project-related information.
2. **Minimal Engagement:**
    - Maintain a basic level of communication and engagement to keep them aware of the project without distracting them from their regular responsibilities.

By understanding the influence and interest of stakeholders using a four-quadrant power grid, project managers can tailor their communication and engagement strategies to effectively manage stakeholder relationships throughout a project life cycle.

Pro tip: While these tools help organize information, they do not necessarily make the difference between successful and unsuccessful stakeholder engagement. What will make for successful stakeholder engagement is the project manager's ability to know their stakeholders' motivations and inspirations. This takes time, interpersonal skills, and insight into the organization's internal political workings. Remember, each project is different, and your project may need tweaks along the way as you grow as a project manager. Making necessary changes means you are doing something right. Just make sure to check in and ensure that you are well on track, engaging your stakeholders successfully, and delivering on your project!

Generating stakeholder buy-in

Once you organize and assess your stakeholders, it is time to start making some decisions on whose buy-in is absolutely necessary for success, whose requirements deserve the most attention, and what level of communication each stakeholder will require.

Gaining key stakeholder buy-in is essential to ensuring that your project is not deprioritized or deprived of resources.

Tips for gaining key stakeholder buy-in include:

- Clearly mapping the work of the project to the goals of the stakeholder.
- Describing how the project aligns with the goals of the stakeholder's department or team.
- Listening to feedback from the stakeholder and finding ways to incorporate their feedback into the project's charter where appropriate.

Manage your stakeholders' expectations by presenting a realistic view of your team's abilities. Do not over-promise and under-deliver!

Building out a RACI chart

A **RACI chart** can be an extremely effective way to define project roles, give direction to each team member and stakeholder, and ensure work gets done efficiently. Having a RACI chart available throughout the duration of your project as a quick visual can be invaluable. In this reading, we will cover the function of a RACI chart and its components and explore how project managers use RACI charts to define and document project roles and responsibilities.

Elements of a RACI chart

A RACI chart creates clear roles and gives direction to each team member and stakeholder. Over your career, you may hear a RACI chart referred to as a Responsibility Assignment Matrix (RAM), RACI diagram, or RACI matrix. The ultimate goal of this chart is to clarify each person's role on your project.

First, let's break down each of the roles people can be assigned:

R: Responsible: who gets the work done

A: Accountable: who makes sure the work is done

C: Consulted: who gives input or feedback on work

I: Informed: who needs to know the outcome

Note that RACI charts can be organized in different ways, depending on personal preference, number of tasks being assigned, and number of people involved. In the previous video, we showed you one RACI chart format. The template below shows another way a typical RACI chart might be organized.

R: Responsible	Assigned to complete the task or deliverable			
A: Accountable	Has final decision-making authority and accountability for completion (only one per task)			
C: Consulted	Must be consulted before a decision or action is taken			
I: Informed	Must be informed after a decision or action is taken			
Task	**List Roles**			
	R	**A**	**C**	**I**
Task 1				
Task 2				
Task 3				
Task 4				

Let's further examine each of the roles and how to determine which team member should be assigned to which role.

Responsible

Individuals who are assigned the “responsible” role for a task are the ones who are actually doing the work to complete the task. Every task needs at least one responsible party. It’s a best practice to try to limit the number of team members assigned to a task’s responsible role, but in some cases, you may have more than one.

A couple of questions to ask yourself when determining which person or people should be placed in the responsible role for a given task are:

- What department does the work fall under?
- Who will perform the work?

It is helpful to evaluate the people on your team to determine the role that suits them. Remember that you may need to list roles rather than names, if some people take on more than one role.

Let’s dig deeper into our example with Office Green. Our task is to develop price points for the project, and the Financial Analyst will complete the work for this task. Therefore, we will list “Financial Analyst” in the responsible role for this task in the RACI chart.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst			

Accountable

The “accountable” person is responsible for making sure the task gets done. It is important to have only one individual accountable for each task. This helps clarify ownership of the task. The accountable person ultimately has the authority to approve the deliverable of the responsible party.

In order to determine who should be tagged as the accountable team member, consider:

- Who will delegate the task to be completed?
- Who will review the work to determine if the task is complete?

You may encounter a situation where the responsible party is also accountable, but where possible, it is helpful to separate these roles. Ensuring that accountability is not shared ensures that there is no confusion on who the ownership belongs to.

Continuing with our Office Green example, you have assigned the “accountable” role to the Head of Finance. The Head of Finance has to make sure the project stays in budget and makes a profit, so they have the ultimate authority over the price points for the product. Therefore, they will need to approve the Financial Analyst’s work on the task.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst	Head of Finance		

Consulted

Team members or stakeholders who are placed in the “consulted” role have useful information to help complete the task. There is no maximum or minimum number of people who can be assigned a “consulted” role, but it’s important that each person has a reason for being there.

Here are a few ways you can help identify who is appropriate for the role:

- Who will the task impact?
- Who will have input or feedback for the responsible person to help the work be completed?
- Who are the subject matter experts (SMEs) for the task?

The consulted people will be in frequent, two-way communication with the responsible party, so it is key to make sure that the right people are in this role to help accomplish the task efficiently and correctly.

Back to the project at Office Green, we’ve got a “responsible” Financial Analyst and an “accountable” Head of Finance. Who else would need to provide input on the product’s price points? Whose decisions and feedback will directly affect the task? The Director of Product will need to be consulted on the matter, as they oversee all product offerings. This person will have information about potential changes to the product and how these changes might affect price points.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst	Head of Finance	Director of Product	

Informed

Individuals who are identified as needing to be “informed” need to know the final decisions that were made and when a task is completed. It is common to have many people assigned to this category and for some team members to be informed on most tasks. Team members or stakeholders here will not be asked for feedback, so it is key to make sure people who are in this group only require status updates and do not need to provide any direct feedback for the completion of the effort.

Key questions to ask yourself in order to ensure that you have appropriately captured individuals in the “informed” role are:

- Who cares about this task’s completion?
- Who will be affected by the outcome?

Now that you’ve determined who is responsible, accountable, and consulted on the Office Green project task, it is time to determine who needs to be informed about the task. Your Financial Analyst has set the price points with input from the Director of Product, and the Head of Finance has approved. You will now need to inform the Sales Team about the final price points, as they will need this information to sell the product.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst	Head of Finance	Director of Product	Sales Team

Pro tip: You could end up with a large number of team members and stakeholders who are placed in the "informed" role. If so, make sure that you have a plan to keep them informed that is not labor-intensive. Something as easy as view-only access to your project plan or meeting notes could prevent you from having to create separate communications along the way.

Getting the most out of a RACI chart

In the previous video, you learned how critical a **RACI chart** is for creating clear roles and giving direction to each team member on a project. In this reading, we will further explore the function and components of RACI charts and how to use them to communicate responsibilities to project teams.

Definition and structure

Determining who is **R**esponsible, **A**ccountable, **C**onsulted and **I**nformed on your projects allows you to keep control of the stakeholders roles on your project.

Step	Project initiation	Project executive	Project manager	Project analyst	Project architect	Application developers
1	Task 1	C	A/R	C	I	I
2	Task 2	A	I	R	C	I
3	Task 3	A	I	R	C	I
4	Task 4	C	A	R	R	I

Workload balance

Are there too many tasks assigned to one stakeholder? When you complete your chart, it is a good idea to go back through and tally the number of Rs assigned to each stakeholder. This can help you identify potentially overloading one team member with work. Using a RACI chart to determine responsibility for tasks can help mitigate single points of failure (known as creating **silos**, where the knowledge and responsibility for a task falls on one person) and allow you, as the project manager, to delegate tasks and avoid burnout. Maintaining workload balance is a critical part of project management. It is easy to fall into the pattern of relying on your top performers to keep the project

moving forward. But this isn't always healthy for the project or your team. If you find that you don't have the right people to assign responsibilities to, take a step back and evaluate your team.

Put your RACI into practice

Once you have created your RACI chart, it is time to put it into practice. You will first need to share your RACI chart with your sponsors and stakeholders to get buy-in and sign-off. When you get stakeholder buy-in, you will be able to set clear expectations for your team and ensure that everyone is aligned on their responsibilities.

You can document your team and stakeholders' acknowledgment of these expectations through the project charter, meeting notes, and in the RACI chart itself. Think back to a time when you were expected to do something you did not agree with, or weren't clear on. That disagreement or lack of clarity made it difficult to do your best work, right? Getting buy-in and continually checking in with your stakeholders and your team is the way to avoid this potential pitfall!

As you take the time to ensure that each task has an owner identified with the appropriate level of engagement, you are streamlining your communication and decision-making process over the life cycle of your project.

When should you use a RACI chart?

If you are wondering if you should use a RACI chart on your project, it is a good idea to evaluate the complexity of the effort. For example, if you have a very small project team with a small number of stakeholders, clearly defined roles, and a short timeline, introducing a RACI chart could possibly slow down the project. However, larger projects, or even projects that involve a large number of stakeholders, could greatly benefit from a RACI chart. It is always a good idea to work through the creation of a RACI chart and evaluate the outcome. Even if you do not end up using the RACI chart, you will have a better understanding of the project, and your effort will contribute to your project management experience overall.

Why projects fail: Initiation missteps

You have been learning the necessary planning steps to take in order to set a project up for success. But despite your best efforts, projects can still fail. Sometimes the factors that lead to project failure are out of your control. The technology to complete the project is unavailable, for example, or a stakeholder decides to drastically change the goals of the project. However, there are factors that can lead to failure that are more in your control, such as being unable to complete the project deliverables within the agreed upon time or being unable to fulfill the stakeholder's vision for the project.

In this reading, we will explore a few key reasons why projects fail and examine how missteps during the initiation phase can lead to project failure.

Unclear expectations

You may remember the questions you need to answer at the start of the initiation phase of the project, including:

- What is the end goal?
- What are the expected deliverables and schedule?
- What is the budget?
- Who are the stakeholders?

Not taking the time at the beginning of a project to ask essential questions, document decisions, and understand the true scope of the project may lead to failure. After all, without directions, you can never reach your destination.

Unrealistic expectations

We all like to impress our managers, but sometimes, we accidentally agree to unrealistic expectations and set our projects up for failure from the start. For example, if a project is expected to take two weeks due to the level of detail and effort required but we try to complete it in one week, we will not have the resources available to meet the consolidated schedule. This will likely result in quality issues. It's important to understand the requirements of a project before agreeing to any deadlines. As a best practice, don't commit to firm dates when initiating the project to avoid setting unrealistic expectations. You will have more information and will be able to better manage expectations in the planning phase.

Miscommunication

Clear communication is key. If information is not communicated in a timely manner, does not include pertinent information (risks, decisions made, scope changes, etc.), or is not sent to the correct stakeholders, then you may be setting yourself up for failure. Conducting a stakeholder analysis and then utilizing a RACI chart to understand which stakeholders should be kept informed or consulted is a great start to creating an effective communication strategy.

As a project manager, you do not necessarily have to cater to everyone's unique communication styles, but you do have to set expectations about how communication will occur. As you are kicking off a project, make sure you take some time to understand the communication needs of your team and stakeholders. Some people dislike emails and would prefer to have a phone conversation, some prefer to have communication in writing, and some prefer face-to-face meetings. A strong communication system incorporates all of these methods. Set expectations for your communication approach early so that you, your team members, and your stakeholders have a clear understanding of how you will all communicate.

Lack of resources

Resources include your team members, budget, and materials. Unfortunately, without proper planning, your resources can quickly be over-tasked or depleted. Sometimes project managers don't account for the fact that team members are juggling multiple tasks and may not be able to devote the time necessary to complete all of their assigned tasks correctly and on time. Or, project managers may not realize that a specific skill set is required to complete certain tasks. Ensuring that the right team members are available at the right time is crucial.

Another common error is to incorrectly calculate your project expenses. For example, imagine you have a project budget of $10,000. If your project requires $10,000 for materials and you also have to ship and install those materials, then you will not have enough money to complete your project. Clarify your resource needs and confirm their availability with leadership up front to avoid delays or issues further along in the project.

Scope creep

The scope provides an overarching framework of what is and is not included in the project's work and deliverables. Defining the scope in the initiation phase helps identify the resources needed, the cost associated with those resources, and the schedule required to complete the work. Sometimes projects fail because the scope of the project grows and impacts to the scope are not captured.

For example, imagine that you are given a project that originally includes three deliverables. During the course of the project, a stakeholder requests that two additional deliverables be included, but no changes are made to the schedule, budget, or team members to reflect the impact of the increased number of deliverables. As a project manager, when deliverables change, you have to make sure that you are capturing the potential impact of those changes to the schedule, budget, and quality. This is why it is so important to make sure that everything is documented in the initiation phase. Have a plan for how to handle scope creep if it occurs, and clarify who has the authority to approve scope changes.