**BASIC WORKSHEET**

for

**Defining the Role and Accountabilities**

**For a Project Manager**

*See URL on the last page for an ADVANCED version of a PM role worksheet*

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**Introduction and Instructions**

**What Is This Worksheet?**

This worksheet is a tool for an organization to use to develop a definition of the role and accountabilities of the project manager that is tailored to the organization’s environment. This worksheet provides the following:

* A framework of topics that define the areas of a PM role and accountabilities
* A background summary for each topic to establish a common understanding of what each role is
* Generic PM role draft text to provide a starting point for customized role definitions
* Alternative role variations for selected roles where variations are common

**Recommended Steps to Develop and Implement a PM Role Definition**

1. **Define a Champion** – Identify an individual in management that will be the PM Role sponsor, champion or executive of interest.
2. **Define a Definition Team and Reviewers** – Determine what team will work together to draft the PM role and what stakeholders will later review and comment on the draft role.
3. **Distribute Worksheet with Instructions** - Distribute this worksheet to the role development team with a request to read and make comments for a subsequent discussion. Note that if the organization has a variety of project types where the role and accountabilities would vary with project type, that distinction should be made and the team should start by addressing one project type, perhaps the most complex project type.
4. **Meet, Discuss and Determine What Can Be Agreed Upon** – The definition team meets to review their individual comments and to make a determination on what role definitions can be agreed upon. This would include a determination of any role topics in the worksheet that will be removed and if new role topics will be added.
5. **Define How Remaining Open Definitions Will Be Addressed** – Where agreement is not reached in initial discussions, define an approach to complete all role topics. As this is accomplished, form a “review draft” of the PM Role Definition.
6. **Stakeholder Review of Draft Role** - Distribute the draft role definition to those stakeholders that will review and comment. Consider a meeting so that reviewers can be briefed on the thoughts behind each role description. Err on the side of “over-communicating” to ensure all appropriate stakeholders have an opportunity to have input.
7. **Finalize and Establish Ownership** - Make final role definition modifications and assign an individual or organization to be the “owner” of the PM role definition. The owner would maintain and support role definition implementation.
8. **Rollout** – Organization management “rolls-out” the PM definition in a group meeting. This meeting would include the “what” and “why” of the new definition including what past project and organization issues related to an insufficiently defined PM role have existed. Included in this message would be the offer to adjust this role definition in the future to best align with project and organization needs.

**Worksheet Usage Notes**

1. This worksheet is a generic PM role definition and contains basic information common to a PM role for most organizations. This generic definition does not necessarily contain specific language or terminology or phraseology that may be needed by any given organization. This generic worksheet also does not necessarily contain all of the categories of accountabilities that may be needed. It is anticipated that any organization would use this generic PM role definition as a starting draft and add, delete and modify the generic topics and contents to form a tailored role definition best supporting organization needs.
2. The definition of a PM role can be viewed as the identification of the role and accountabilities of a project management position whether or not the organization has a formal PM position identified. That is to say that if a formal position of a “Project Manager” does not exist in a given organization, a PM role definition is still of value in providing a framework for those individuals that act in the PM role.
3. It is important to note that this worksheet is not an end, but a start of a PM definition effort. The worksheet forms the framework to understand basic role components, collect views and discuss details. A facilitated session, best led by a PM expert, to discuss variations to the worksheet responses followed by stakeholder reviews is the key to defining a workable role definition for any organization.
4. Role definition teams can err both on the side of simplicity and on the side of detail. Some role detail is key to capturing and communicating substance while some level of simplicity is needed to allow a given role definition to apply to a broad range of projects and to be accepted. As such, role development teams are encouraged to include sufficient substance to define important PM behaviors, yet limit the level of detail to only what is essential to describe these behaviors.

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**The BASIC Worksheet**

*See URL on the last page for an ADVANCED version of a PM role worksheet*

***INSTRUCTIONS*** *- The following are generic and common roles and accountabilities for a project manager. Note that a wide variation of accountabilities will exist across different organizations. As such, it is important that any given organization review and tailor both the set of role topics and the related accountabilities text for each topic to best align the role with the organization’s needs and environment. For each accountability noted below, read the “Background” to ensure a common understanding of the given topic exists within the role development team and then consider the draft text provided as the team works to complete your accountability definition for each topic. Assume that this will be an iterative process, as progress in one area may generate ideas for changes in other areas. Quality of information, not the speed of completion is the recommended priority.*

**General PM Role**

*<< Generic PM Role Text Follows >>*

**General PM Role** - The project manager’s role is to lead and manage a project to meet the goals, requirements and constraints defined for each project. The PM is responsible to initiate, plan, perform, control and complete the project successfully. The project manager acts as a facilitator of project work and as a single point of contact for all stakeholders involved in the project. The PM is proactive and seeks out issues to handle vs. waiting for issues to become real problems. The PM is responsible for ensuring the project work and team comply with all pertinent organization processes and policies and all regulatory and legal constraints that apply to a project. The PM seeks to build an understanding of the organization, its processes, systems, roles and culture to best support the successful management of projects. The PM builds and maintains an awareness of true customer needs and of the environments the project exists within. The PM considers each project a “business on to itself” and manages the project with a strong “business sense.” The PM is accountable for the project overall.

*<< Prepare your role definition below. Leave the text above in place for reference to support discussions until your draft is complete. >>*

**General Role** - The project manager’s role is to …..

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**Project Definition Role**

*Background - The “Project Definition” (or project charter) for a given project defines the project at a top level such that all stakeholders understand what the project is and is not. The project definition is a basis for the project plan and the project itself. The project definition is typically a one or two page document that includes the purpose of the project and importance, a top level definition of work scope, identifies the project deliverable, includes major assumptions, constraints such as schedule and budget and contains other critical initializing information that becomes the foundational definition of the project. The project definition maybe completed prior to, or part of “Project Authorization.” (See* [*www.manageprojectsbetter.com*](http://www.manageprojectsbetter.com) *and look under the “Tools” tab for a free download of an example “Project Definition Worksheet.”)*

*<< Generic PM Role Text Follows >>*

**Project Definition** - In the development of the project definition, the project manager is accountable for …………….*(select one or more of the following)* …………….

* ….the development, review and communication of the project definition.
* …..reviewing, commenting and accepting a project definition provided as direction from management or from another appropriate sponsoring stakeholder.
* …..working with management or other appropriate sponsoring stakeholder to develop the project definition.
* …..supporting or developing the project definition in a manner unique to a given project.

Independent of the manner in which the project definition is developed, the project manager is eventually accountable overall to ensure the project definition is completed, is accurate and contains all needed information. The PM is accountable to surface concerns when the project definition is inadequate for project success and takes actions, where appropriate, to resolve those deficiencies. The PM maintains or ensures the maintenance of the project definition during the project.

*<< Prepare your role definition below. Leave the text above in place for reference to support discussions until your draft is complete. >>*

**Project Definition** - In the development of the project definition, the project manager is accountable for …….

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**Project Deliverable Requirements**

*Background - The deliverable of a project is the end result of the project. This could be a product, study, a design, information, hardware, software, a system, decisions and many other things and combinations of things. Every project needs requirements for the deliverable. The* ***project deliverable requirements*** *are a set of information that defines constraints on the project’s intended result or deliverable. These constraints are not financial or schedule constraints that exist in the project definition, but are functional, performance, regulatory, physical and many other categories of constraints that the project’s outcome must conform to. As an example, if the project is to build a new home, the “deliverable requirements” would be the set of information that would exist before the house plans are prepared. These deliverable requirements could include energy efficiencies, size, style, materials, maintenance needs, building codes and many other items. As another example, if the project is R&D, a study or investigative effort, the requirements would be the processes and standards that would guide the completion of such activities.*

*<< Generic PM Role Text Follows >>*

**Project Deliverable Requirements** - The PM is accountable for ….. *(use one or more of the following statements)* ………….

* …receiving the deliverable requirements, reviewing, understanding and validating both the completeness and accuracy of the requirements and communicating these requirements to the project team.
* …developing the deliverable requirements and providing those requirements to appropriate stakeholders for review and acceptance.
* …cooperatively working with management and/or other appropriate stakeholders to develop the project deliverable requirements.
* … supporting the determination of how the project deliverable requirements will be defined, who will be involved and who will manage the requirements development activity.
* …..supporting another party *(state party)* in the development of the project deliverable requirements.
* …..no part of the deliverable requirements generation actions and receives the requirements from……….(insert position or organization that provides the deliverable requirements)……………...

Independent of how the project’s deliverable requirements are developed, the project manager is accountable to ensure that an adequate set of deliverable requirements exists to drive a successful project. Where these requirements are inadequate, the PM is accountable to make recommendations and/or take actions to resolve any requirements completeness or accuracy deficiencies. The PM is also accountable to ensure that all appropriate stakeholders understand the deliverable requirements including the project team.

*<< Prepare your role definition below. Leave the text above in place for reference to support discussions until your draft is complete. >>*

**Project Deliverable Requirements** - The PM is accountable for

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**Project Planning Role**

*Background - A project plan is needed for every project no matter how small. A very small project may be adequately served with a list of work, a simple flow chart of that work and work assignments. Larger projects really need a more comprehensive plan that includes a complete WBS, work assignments, detail schedules, resource needs, budgets and other needed plan components. The plan is needed to be able to direct project work and to measure work progress. Typically the PM prepares the project plan with support from the project team and may use external experts. (For an overview of planning, see the “Planning Tutorial” at* [*www.manageprojectsbetter.com*](http://www.manageprojectsbetter.com) *under the “Learning Tab” and select “PM Tutorials.”)*

*<< Generic PM Role Text Follows >>*

**Project Plan** - The PM is accountable for the development of the project plan. The plan must be sufficient in content, detail level and accuracy to both direct project work and to assess project status in a manner consistent with supporting a successful project outcome. The PM is responsible for working with the project team, management sponsors and other related stakeholders in developing the plan for the project that is consistent with all requirements, contains all needed work and is of sufficient detail level and accuracy to support effective management of the project. The plan must be consistent with the constraints the project will operate within including budget limitations, schedule needs, organization processes, any external regulatory requirements and all other pertinent project constraints. The PM is accountable to communicate the resulting project plan to the project team and other appropriate stakeholders in a manner that is consistent with an adequate understanding of the plan. The PM is accountable for maintaining the project plan during the project in a manner that supports a successful project.

*<< Prepare your role definition below. Leave the text above in place for reference to support discussions until your draft is complete. >>*

**Project Plan** - The PM is accountable for ……

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**Project Execution,** **Monitoring and Control Role**

*Background - Project execution is the performance of project work. Project monitoring and control are the actions taken by the PM and team to track project work completion, schedule, budget and resource status and to identify any problems and variances to the plan and then to identify and implement corrective actions to resolve those problems.*

*<< Generic PM Role Text Follows >>*

**Project Execution, Monitoring and Control** - The PM is accountable to complete project work in a manner consistent with the project plan, management direction and defined priorities. The PM is accountable to monitor work progress, monitor schedule progress, monitor budget expenditures, monitor resource measures and to monitor other project metrics that are important for a full view of project activities. The PM is accountable to ensure that this information is analyzed to both clearly understand progress and to identify any problems that may exist. Where problems are uncovered, the PM is accountable to work with the project team and project stakeholders to identify root causes and to define, implement and track needed corrective actions in a manner to keep project work aligned with the project plan and consistent with a successful project completion. The PM is accountable to ensure the project work conforms to all internal and external processes, standards and regulations pertinent to the given project. The PM is accountable to actively manage the project by seeking out potential issues and taking action accordingly.

*<< Prepare your role definition below. Leave the text above in place for reference to support discussions until your draft is complete. >>*

**Project Execution, Monitoring and Control** - The PM is accountable to …..

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**Management Reporting Role**

*<< Insert Your Role Definition Here. Include what management reporting is standard within your organization. If no procedures on management reporting are currently in place, identify what management reporting the PM should perform. >>*

**Management Reporting** – The PM is responsible for the following reporting actions to management related to the respective project:

* Xx
* Xx

**Resource Management Role**

*<< Insert Your Role Definition Here. Define the PM’s role in defining, acquiring and managing internal resources for projects. This may involve working with a resource organization and/or management and/or PMs of other projects. (Note that managing subcontractors is a separate topic) >>*

**Resource Management** – The PM is responsible for ….

**Role in Working with Customers**

*<< Insert Your Role Definition Here. Define what responsibilities the PM has relative to the interfacing with customers. This may be fixed or may vary from project to project. This may be defined by management for each project. There may be no customer interface responsibilities, if none, so state. In other cases, the PM might be the only interface an organization has with the customer. Define general fixed or variable roles. >>*

**Working With Customers** – The PM has the following customer interface or customer management responsibilities:

* Xx
* Xxx
* Xxx

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**Role in Working with External Stakeholders**

*<< Insert Your Role Definition Here. Define what responsibilities the PM has relative to the interfacing with external stakeholders that can include government regulatory agencies, business partners, local governments or the public at large. This may be fixed or may vary from project to project. This may be defined by management for each project. There may be no responsibilities. Define any fixed or variable roles. (Note that working with subcontractors and customers are addressed in other sections). >>*

**Working With External Stakeholders** – The PM has the following responsibilities for interfacing with external stakeholders.

* External Stakeholder 1 – The PM ……
* External Stakeholder 2 – The PM ……
* External Stakeholder 3 – The PM ……
* …………………..

**Role in Working with Internal Stakeholders**

*<< Insert Your Role Definition Here. Define what responsibilities the PM has relative to the interfacing with internal stakeholders that may include HR, peer groups, development groups, quality or marketing/sales as examples. This may be fixed or may vary from project to project. This may be defined by management for each project. Define any fixed roles or variable roles. >>*

**Working With Internal Stakeholders** – The PM has the following responsibilities for interfacing with internal stakeholders.

* Internal Stakeholder 1 – The PM ……
* Internal Stakeholder 2 – The PM ……
* Internal Stakeholder 3 – The PM ……
* ……………….

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**Project Team Leadership Role**

*Background – Project managers function as both leaders and managers. Leadership is not planning and control of requirements, schedule and costs but is both a set of character attributes and a set of demonstrated leadership behaviors. Many definitions of leadership exist and those definitions that are defined by the respective organization should be included here. Follows are some generic leadership role statements that can be considered.*

*<< Generic PM Role Text Follows >>*

**Project Leadership** –The project manager is the leader of the project and of the project team and works to establish and maintain that role with all stakeholders. The PM garners team respect through his/her leadership and professional behaviors. The PM acts in a professional, honest, ethical and fair manner and works consistently and visibly to demonstrate these attributes and to instill these behaviors in the project team. The PM puts the needs of the customer and the organization and the team ahead of their own interests. The PM empowers team members in a professional and constructive manner. The PM resolves conflict effectively and corrects work performance deficiencies as well as recognizes strong work performance in individual team members. The PM works to grow the knowledge and skills of the project team. The PM shields the team from unnecessary project intrusions related to organization politics or other sources of disruption. The PM builds and motivates the team to complete the project successfully. The PM’s actions and behaviors establish an effective leadership role model for others to follow.

*<< Prepare your role definition below. Leave the text above in place for reference to support discussions until your draft is complete. >>*

**Project Leadership** –The project manager is the leader of the project and ……

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**Additional Roles**

<< Insert Additional PM Role and Accountability Topics Not Address Above >>

*<< Insert Your New Role Title and Role Definition Here >>*

**New Role Title** – XXX

*<< Insert Your New Role Title and Role Definition Here >>*

**New Role Title** – XXX

*<< Insert Your New Role Title and Role Definition Here >>*

**New Role Title** – XXX

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**END OF**

BASIC WORKSHEET

for

Defining the Role and Accountabilities

For a Project Manager

*Developed and Provided by*

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*This document is a work in process and is updated periodically.*

*The latest version of this document and other PM resources, can be found at* [*www.manageprojectsbetter.com*](http://www.manageprojectsbetter.com)

*See an ADVANCED version of this worksheet at the site noted above.*

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