RACI template with a filled example, Excel checks and a 45-minute session

A RACI template is a grid that lists the tasks of one project down the side and the people or roles across the top, and marks who does each task (R), who answers for it (A), who is asked first (C) and who is told (I). This kit gives you a blank RACI grid, a filled example from a fictional course launch, checks for exactly one A and at least one R per task, a load check per person and a 45-minute session to agree the grid.

45 minutes | 3–10 participants | Online and adaptable in person

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The outcome

In 45 minutes a project team of 3–10 people has a RACI grid for one project in which every task has exactly one A and at least one R, a load count for each person with any overload discussed, and a written list of changes and open questions, each with a person who confirms it.

Before the session

- For trainers, facilitators and project leads who help a project team of 3–10 people agree who does what on one project, soon after the kickoff.
- Ask the project lead to draft the grid a day ahead: 10 to 12 tasks, each starting with a verb, and one column per role. Gaps are fine; the session finds them.
- Share the draft, the letter guide and the checks in one document, or print one copy per person. Fill the workbook as you go, or tick the Check column by hand.
- Send the draft a day early as plain text for screen readers; letters carry the meaning, not colour. Allow written comments, let people pass, keep cameras optional. The grid covers this project only.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- RACI grid
- Load check
- Changes and open questions
- Filled example: draft RACI grid with checks
- Filled example: agreed RACI grid
- Filled example: load check
- Filled example: changes agreed in the session
- Facilitator section: run of show, reference tables, debrief and adaptations

RACI grid

Write one task or decision per row, starting with a verb. Write a role or a name above each column. In each cell write R, A, A/R, C or I, or leave it empty. In the Check column, tick A when the row has exactly one A (or A/R) and R when it has at least one R (or A/R).

R does the work. A answers for the result and can say no. C is asked before the work is final. I is told afterwards. This grid covers one project; it is not a job description.

#	Task or decision	Role 1	Role 2	Role 3	Role 4	Role 5	Role 6	Role 7	Role 8	Check
	Write the roles or names here									
T1										A ☐ R ☐
T2										A ☐ R ☐
T3										A ☐ R ☐
T4										A ☐ R ☐
T5										A ☐ R ☐
T6										A ☐ R ☐
T7										A ☐ R ☐
T8										A ☐ R ☐
T9										A ☐ R ☐
T10										A ☐ R ☐
T11										A ☐ R ☐
T12										A ☐ R ☐

Load check

One row per column of the grid. Count the rows where the person holds R, A or A/R; an A/R counts once. Agree a limit before you count. Five is a starting point for a grid of 10 to 12 tasks, not a rule.

Role or name	Rows with R	Rows with A	Rows with R or A (load)	Above our limit?	What we will change or accept

Our limit: rows with R or A per person

_____

Changes and open questions

One line for each row that fails a check or that someone marked with a question mark. Write what was found, what the team agreed and who confirms it. A row that is not settled in about two minutes is Open: name who decides and by when.

#	Row	What the check or the group found	What we agreed	Confirmed by	Status
1					
2					
3					
4					
5					
6					
7					
8					

Filled example: draft RACI grid with checks

Fictional example. A learning team launches a half-day course on handling customer complaints for staff at three contact-centre sites. The learning lead drafted this grid before the session on Wednesday 14 October 2026. Four rows fail a check, and the learning lead holds R or A on 10 of the 12 rows.

#	Task or decision	Sponsor	Learning lead	Course designer	Lead trainer	Coordinator	Site managers	IT support	Check
T1	Agree the course objectives and how success is judged	A	R	C	C	C	C		More C than the limit.
T2	Write the session plan and participant materials		A	R	C				OK
T3	Approve the final materials	A	A	R	C				More than one A.
T4	Run the pilot session and collect feedback		A	R	R		I		OK
T5	Agree the dates of 12 sessions across three sites	I	A		C	R	C		OK
T6	Book rooms and equipment at each site				I	R	C		No A.
T7	Release staff from the phones to attend	I	C			I	A/R		OK
T8	Send invitations and joining instructions		A		I	R	I		OK
T9	Set up the online pre-course quiz		A	C				C	No R.
T10	Deliver the sessions		A		R	C	I		OK
T11	Track attendance and follow up people who missed a session		A			R	C		OK
T12	Report results to the sponsor after the first month	I	A/R		C	C			OK

Filled example: agreed RACI grid

The same grid after the session. Every row now has exactly one A and at least one R, no row has more than three Cs, and nobody holds R or A on more than five rows. The team reviews it on Friday 30 October 2026, after the pilot and before the first sessions on Monday 2 November.

#	Task or decision	Sponsor	Learning lead	Course designer	Lead trainer	Coordinator	Site managers	IT support	Check
T1	Agree the course objectives and how success is judged	A	R	C	C	I	C		OK
T2	Write the session plan and participant materials		A	R	C				OK
T3	Approve the final materials	A	C	R	C				OK
T4	Run the pilot session and collect feedback		A	R	R		I		OK
T5	Agree the dates of 12 sessions across three sites	I	C		C	A/R	C		OK
T6	Book rooms and equipment at each site				I	A/R	C		OK
T7	Release staff from the phones to attend	I	C			I	A/R		OK
T8	Send invitations and joining instructions		I		I	A/R	I		OK
T9	Set up the online pre-course quiz		I	A/R				C	OK
T10	Deliver the sessions		A		R	C	I		OK
T11	Track attendance and follow up people who missed a session		I			A/R	C		OK
T12	Report results to the sponsor after the first month	I	A/R		C	C			OK

Filled example: load check

Rows with R, A or A/R per role, before and after the session, against the team's limit of five.

Role	Rows with R or A: draft	Rows with A: draft	Draft against the limit of 5	Rows with R or A: agreed	Rows with A: agreed	What changed and why
Sponsor	2	2	Within	2	2	No change. Keeps the A on objectives and on sign-off of the materials.
Learning lead	10	9	Above	5	4	Above the limit of 5 in the draft. Handed four tasks to the coordinator and the quiz to the course designer.
Course designer	3	0	Within	4	1	Took on the pre-course quiz (T9) as A/R. Agreed in the session.
Lead trainer	2	0	Within	2	0	No change. The open question on cover for sick days sits with the learning lead.
Coordinator	4	0	Within	4	4	Same load, but now answers for the four tasks they already did: dates, rooms, invitations, attendance.
Site managers	1	1	Within	1	1	Only one A/R, but it is the task most likely to slip: releasing staff from the phones.
IT support	0	0	Within	0	0	No R or A. Consulted on quiz access only; the column stays so IT sees the request.

Filled example: changes agreed in the session

Seven changes were agreed and one question stayed open. Each change names the person who confirmed it.

#	Row	What the check or the group found	What we agreed	Confirmed by	Status
1	T1	Four people marked C. Objectives would wait for four sets of comments.	The coordinator moves from C to I. Three people are consulted.	Coordinator	Agreed
2	T3	Two As: the sponsor and the learning lead both thought they signed off the materials.	The sponsor keeps the A. The learning lead is consulted before sign-off.	Sponsor	Agreed
3	T5	The learning lead held the A on dates the coordinator already arranges.	The coordinator holds A/R. The learning lead is consulted.	Coordinator	Agreed
4	T6	No A. Nobody could say when room booking was finished.	The coordinator holds A/R. Site managers are consulted on rooms.	Coordinator	Agreed
5	T8	The learning lead held the A on routine messages that the coordinator writes.	The coordinator holds A/R. The learning lead is informed.	Coordinator	Agreed
6	T9	No R. Everyone assumed IT would build the quiz; IT expected to be asked only.	The course designer holds A/R and builds the quiz. IT is consulted on access.	Course designer	Agreed
7	T11	The learning lead held the A, but the coordinator already keeps the attendance list.	The coordinator holds A/R. The learning lead is informed of no-shows each week.	Coordinator	Agreed
8	T10	Not a letter problem: nobody knew who covers a session if the lead trainer is ill.	Open. The learning lead names a cover trainer by Friday 23 October.	Learning lead	Open

Facilitator run of show

1 Open and agree what the letters mean | 4 minutes

Say: “We will leave with a grid for this project that says who does each task, who answers for it, who is asked first and who is told. It covers this project only. It is not a job description.” Read the letter guide aloud, one line per letter. Stress the two rules: each task has exactly one A, and at least one R.

2 Check the task list | 6 minutes

Read the task list aloud. Ask: “What is missing? What is two tasks written as one?” Add missing tasks and split any task that has two owners in practice. Each task starts with a verb. Stop at about 12 rows; group small tasks rather than adding more rows.

3 Read your own column in silence | 8 minutes

Give eight minutes of silence. Each person reads down their own column and marks every row where they disagree with a question mark and a short note, in pencil, in a comment or in the chat. Say: “Read your column as a promise. Would you sign every letter in it?” Nobody has to explain a mark yet.

4 Run the row checks | 8 minutes

Go row by row, quickly. For each row read the Check column, or count by hand: one A, at least one R, no more than three C. Write each row that fails a check, and each row with a question mark from step 3, on the sheet “Changes and open questions”. Do not fix anything yet; this step only builds the list.

5 Settle the flagged rows | 12 minutes

Take the flagged rows in task order, about two minutes each. For a missing or double A ask: “If this goes wrong, who will be asked why?” For a missing R ask: “Who will do this next week, and do they know?” For many Cs ask: “Whose view could change the result?” Write the change and the person who confirms it. If a row is not settled in two minutes, mark it Open and name who decides and by when.

6 Check the load per person | 5 minutes

Count each column: how many rows hold an R, an A or an A/R. Read the counts aloud against the limit the team chose (five in the example). For anyone above it ask: “What will you hand over, or what makes this load fine?” Record the answer. A person may accept a high load; the point is that the team knows.

7 Read back and close | 2 minutes

Read back the changes, the open questions with their owners and dates, where the grid is kept, and the date of the first review. Ask each person to confirm their column with a word aloud, in the chat or in writing afterwards. Passing now and confirming in writing later is fine.

Reference tables

What each letter means

RACI is a widely used convention for sharing out responsibility; it has no single owner or author. The wording, the questions and the checks here are written for this kit.

Letter	What it means here	The question that settles it	Common mistake
R: Responsible	Does the work, or makes sure it gets done.	“Who will actually do this next week?”	Several Rs and nobody leading them, or an R for a group with no contact.
A: Accountable	The one person who answers for the result, signs it off and can say no.	“If this goes wrong, who will be asked why?”	Two As, or an A given to a committee, so nobody decides.
C: Consulted	Asked for a view before the work is final. Two-way.	“Whose view could change the result?”	Everyone is consulted, so the work waits for many replies.
I: Informed	Told when the work is done or decided. One-way.	“Who needs to know, but not to agree?”	People marked I expect to be asked, because nobody explained the difference.
A/R	The same person answers for the result and does the work.	“Is this small enough for one person to own and do?”	Used on large tasks, so nobody checks the work.

Checks to run on a RACI chart

The Excel workbook runs all five checks. On paper, count by hand in step 4 and step 6 of the session.

Check	Rule in this kit	What a failure usually means	What to ask
One A per row	Exactly one A or A/R on every row	No A: nobody can say it is done. Two As: a hidden disagreement.	“If this goes wrong, who will be asked why?”
At least one R per row	One or more R or A/R on every row	The A expects someone else to do the work.	“Who will do this, and do they know?”
Consulted limit	No more than 3 Cs on a row (you set the number)	The task waits for comments from too many people.	“Whose view could change the result? Can the others be informed?”
Load per person	No more than 5 rows with R or A per person (you set it)	One person is a bottleneck, often without saying so.	“What will you hand over or stop, or what makes this load fine?”
Empty column	Every role column holds at least one letter	The role is not needed, or a task is missing.	“Is a task for this role missing?”

Debrief and next steps

Questions for reflection

- Which row surprised us most when we read our own columns, and why had nobody raised it before?
- Where did we have two As or none, and what would have happened if we had not found it?
- Who is above the load limit, and what have we agreed to hand over or accept?
- Which open question must be settled first, and who will tell the rest of us when it is?

Adapt the session

- For three or four people, go down the grid together, but ask each person to read their own column before anyone speaks.
- For a 25-minute version, ask people to mark question marks before the session, then run the checks and settle the flagged rows only.
- Online, share the workbook on screen and collect question marks as comments or in the chat. Read each flagged row aloud. Cameras optional, captions on.
- For quiet participants and people working in a second language, collect question marks in writing and read them out without names. Anyone can pass and confirm their column in writing after the session.
- For more than 12 tasks, split the grid by phase or workstream and run the session once for each.

After the session

Send the agreed grid and the changes list the same day and keep the grid where the team can read it. Chase each open question by its date. Review it at the first milestone or when someone joins or leaves: read the Check column and the load row, and move letters where the work has moved. When a task slips, look at its row before asking who dropped it.

Questions people ask

What is the difference between responsible and accountable?

The responsible person does the work. The accountable person answers for the result: they sign it off, can say no and are asked why if it goes wrong. On a small task one person can be both, written A/R. Several people can be responsible; only one is accountable.

Can a task have more than one accountable person?

Not in this template. Two As usually hide a disagreement. If two people really share a decision, split the task into two rows, or give one the A and consult the other.

How is this different from the team charter template?

The team charter template records how a team works in general: purpose, decision types, communication and review. This RACI template goes task by task through one project and checks every row. Use it after the project kickoff meeting agenda, which names one owner per role.

When is a RACI chart the wrong tool?

When the work changes every week, when two or three people talk daily, or when the real question is about pay, grading or performance. It is not a job description or an HR document.

What is included in the free and editable files?

The open PDF has the blank grid, load check and changes sheet, the filled examples, the letter guide, the checks and the 45-minute session. Subscribers also receive the editable Word file, an Excel workbook that runs every check with letter drop-downs, and a CSV of the agreed example grid.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.