**Project Roles Document**

**[AGENCY NAME]**

**[PROJECT NAME]**

Publish Date

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# Using this Template

This template contains “suggested language” and assumes that the author of this document will make appropriate additions, deletions, and changes for their specific project needs.

To create a document from this template:

* Replace [bracketed text] on the cover page, in the header, and throughout the document with your project and agency information by filling in the [bracketed text] area in the document text. Filling in the information once, will propagate that field throughout the document.
* Complete the entire template making all necessary adjustments
* Each section contains abbreviated instructions (**Green Font**) and an example using (**Black Font**).
* Delete this “Using This Template” page.
* Update the Table of Contents by clicking on the “References” tab, selecting “Update Table”, then “Update Entire Table” and click “Ok”.
* Save.

To provide any suggested improvements or corrections, please email TBSM.info@tn.gov

# Revisions

| Revision | Description of Change | Author | Effective Date |
| --- | --- | --- | --- |
| V1 | Initial document upload to TBSM intranet site | BSD Team | 09/28/12 |
|  |  |  |  |
|  |  |  |  |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Senior Project Director | The SPD owns and drives the solution delivery process. The SPD mobilizes and uses the project team to complete the project successfully. This role is responsible and accountable for the overall planning, execution and control of the project. |   |   |   |
| **Responsibilities** |
| * Oversees the implementation of the project on a daily basis (may include multiple projects) with regard to time, budget and quality
* Manages the project, with the collaboration of the project leads
* Defines the project management strategy and approach adhering to PMBOK guidelines and standards
* Develops and maintains the project plan including project assignments and the various project reports
* Plans, organizes, and controls the activities and resources of the project team and report on the team’s progress
* Monitors, evaluates, and reports on project performance (budget, cost, schedule, scope, quality, risk, and issue) and financial status
* Maintains overall change control procedure
* Ensures that the project work results are compliant with the stated requirements, priorities, and strategies of the project
* Manages the relationship with the external providers and review performance
* Manages project status and report project progress to project team and senior management
* Communicates project progress and directions to the project team, and Sponsors
* Raises project issues and risks, as well as quality and scope deviations and escalate as necessary
* Selects, develops and oversees an effective team and allocate team members to project tasks
* Mediates problems encountered by team members
 |
| **Knowledge & Skills** |
| * Proficiency in project’s core (primary) technology
* Proficiency in supporting technology areas
* Industry knowledge
* Ability to prepare comprehensive technical specifications
* Design skills
* Product knowledge
* Process knowledge
* Management of intellectual property
* Team and individual leadership
* Oral and written communication
* Conflict resolution
* Negotiation
* Influencing
* Delegating
* Coaching and mentoring
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Executive Sponsor | Champion the project; provides high level vision |  Executive |   |  45% |
| **Responsibilities** |
| * Provides guidance and direction for key business strategies
* Resolves business policy and project issues that are escalated to the highest management level
* Signs off on large, strategic project deliverables
* Reviews the Project Budget and assists in procuring project funding
* Approves BSD Resources
* Provides agency project team resources
* Approves the Project Plan
 |
| **Knowledge & Skills** |
| * Knowledge of the mission and the operational functionalities used to support it
* Commitment to the initial scope and purpose of the project
* Fidelity to the approved project plan
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Business Sponsor | The role of the Business Sponsor is to provide guidance and direction for key business strategies. The Business Sponsor answers the business-driven question, "Why are we doing this?" and ensures that all members of the team know and understand the answer. |  Executive |   |  45% |
| **Responsibilities** |
| * Works with Executive Sponsor to resolve escalated project related business policy issues
* Provides input into issue resolution alternatives before they are brought to the Executive Sponsor
* Reviews and approves Medium, Large, and Strategic Program/ Project deliverables
* Works with the Executive Sponsor and Project Management Team to resolve project issues in their management area and partners in decision making
 |
| **Knowledge & Skills** |
| * Familiarity with their department’s operational functions, processes and procedures
* Understanding of their department’s role in fulfilling the Agency’s mission
* Awareness of the elements of technical and operational support required for their department’s functionality
* Knowledge of the project management approach, knowledge areas, processes and tools adopted for this project
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Technical Sponsor | The role of the Technical Sponsor provides guidance and direction for key technology strategies. The Technical Sponsor spearheads the resolution of technological driven issues, "How are we doing this?" and ensures that all members of the team are aware of the issues, the answer and the justification(s) for that answer. The Technical Sponsor is ultimately responsible for the quality of all of the technical environments required for the project’s construction, testing, training and implementation, as well as, the preparedness of the technical staff to own and manage the operational and technical support of the system upon implementation. |  Executive |   |  65% |
| **Responsibilities** |
| * Makes IT resources available
* Signs off on program/project deliverables
* Resolves major technical and policy issues
* Assists with resolution for escalated project issues
* Provides input into issue resolution alternatives before they are brought to the Executive Sponsor
* Partners in project decision making
* Functions as the ultimate liaison between \_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_
* Reviews and approves all Project deliverables
 |
| **Knowledge & Skills** |
| * Knowledge of the department’s technical resources and their skill sets, operational and support processes and functionalities employed to maintain the technologies to meet the implied or explicit Service Level Agreements with the business.
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Project Steering Committee | The role of the Program/Project Steering committee is to provide overall guidance as needed to ensure that the project meets the goals and objectives. This committee is comprised of the Executive and Business Sponsor and designated stakeholders representing the affected organizational units.  |   |   |   |
| **Responsibilities** |
| * Reviews and approves program/project deliverables
* Reviews and approves formal changes to the product and project
* Reviews project status reports
* Provides input for high level issue resolution
* Supports project resource requirements
 |
| **Knowledge & Skills** |
| * Understanding of the Agency’s mission and how the project supports it
* Understanding of the role of the Project Steering Committee
* Conflict resolution skills
* Understanding of basic project management precepts and software development lifecycle methodology
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Business Analyst | The role of the Business Analyst is to translate business needs into detailed requirements, determining and defining all of the approved features and functions. |   |   |   |
| **Responsibilities** |
| * Works with business subject matter experts and stakeholders, such as staff, IT professionals, and executives, to define business requirements and needs
* Serves as the liaison among stakeholders to elicit, analyze, communicate and validate requirements
* Helps to understand business problems and opportunities and recommends solutions that enable the business to achieve its goals and objectives
* Produces various requirements documentation outputs in accordance with the Requirements Management Plan
 |
| **Knowledge & Skills** |
| * Exceptional oral and written communication skills
* Technical skills
* Analytical skills
* Problem solving
* Ability to make decisions and champion them
* Managerial skills
* Negotiation and persuasion skills
* Conceptual modeling
* Decomposing abstract into details
* Mentoring and coaching
* Change management
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Organizational Change Manager | Team member with responsibility for assessing, monitoring and suggesting appropriate change methods appropriate to the project and circumstances to assure the most chance of success by managing the emotional and technical changes within a project. |   |   |   |
| **Responsibilities** |
| * Assesses project and team for method of change management approach needed
* Develops project and team Communications Plans
* Monitors project and team for communication success and make suggestions for necessary adjustments
* Manage the “people side” of change
* Translate organization vision into clear messages
* Prepare affected stakeholder populations for changes
* Redesign jobs and organization structure to accommodate change
* Create training strategy/training artifacts to enable change
* Coach sponsors/leaders about how to fully support the change and how to anticipate and reduce the impact of resistance
 |
| **Knowledge & Skills** |
| * Team Development
* Facilitation
* Organizational Design
* Culture Theory
* Job Design
* Communications Strategy & Implementation
* Sponsor/Leader Coaching (re: change management/resistance management)
* Risk Assessment
* Stakeholder identification and assessment (skills, knowledge)
* Training Skills gap analysis
* Instructional design
* Training development & evaluation
* Influencing skills
* Human behavior theories
* Change management theories
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Project Controller | Team member with responsibility for financial baselining, monitoring and reporting for a project during its change/development lifecycle from Pre-engagement through Project Closing. |   |   |   |
| **Responsibilities** |
| * Develops project estimates in conjunction with Senior Project Director
* Establishes project budget baseline
* Tracks actual spending against baseline
* Manages and monitor the overall financial health of the project
* Oversees project financial operations
* Communicates with appropriate stakeholders as to project budget and actual financial status
 |
| **Knowledge & Skills** |
| * Analytical skills
* Detail oriented
* Proficiency in project management
* Proficiency in supporting technology areas
* Process knowledge
* Oral and written communication
* Conflict resolution
* Negotiation
* Influencing
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Training Manager | Team member who is responsible for guiding agency lead trainer in the best practices and techniques for training of their team. |   |   |   |
| **Responsibilities** |
| * Determines training strategy and delivery, working with agency on approach
* Develops, organize and deliver train-the trainer sessions for key agency users to utilize
* Develops training logistic needs such as training schedule, locations, equipment needs, materials, cost estimates and source vendors as appropriate
* Measures success using course evaluations and identify any necessary modifications
 |
| **Knowledge & Skills** |
| * Persuasiveness
* Consultative skills
* Verbal presentation skills
* Exceptional written skills
* Product knowledge
* Process knowledge
 |

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| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| Testing Manager / Lead | Determine testing approach and methodology best suited to ensure the product meets the identified objectives of the use case(s) with accuracy and satisfaction to the project/product goals. This role will be ultimately responsible and accountable for the formulation and implementation of the testing plan for the project. This role will provide general supervision and guidance for all testing tasks and for all resources, Agency, Vendor, or other, involved in supporting the testing effort. A key responsibility will be the collection of testing metrics and the reporting of testing status throughout the project. The Testing Manager/Lead is an intricate part of the Project Management Team (PMT) and will participate in PMT activities.  |  Management |   |  75% |
| **Responsibilities** |
| * Communicates testing status
* Provides testing metrics
* Manages the development of test cases
* Plans and direct the UAT effort
* Coordinates performance testing
* Leadership & management of the State User Acceptance Test (UAT) team
	+ Coordinates activities of the State software testers during each testing phase of the project
	+ Responsible for applicable phases of testing and the management of the testing activities within the project
	+ Resource management (allocation, monitoring, motivating, etc.)
	+ Works closely with the Vendor Test Manager to provide direction to the State testing team in conducting user acceptance testing
* Provides authoritative advice and guidance to colleagues on any aspect of testing, including training for testers and other developers where appropriate
* Overall responsibility for production of all State testing deliverables and achievement of testing milestones during the project
	+ Responsible for creation and delivery of the State UAT Plan
	+ Authors, with collaborative buy-in from stakeholders, a practical methodology for UAT
	+ Publishes, champions, and revises UAT plan in partnership with the Project Management Team
	+ Coordinates with staff and management representatives from a number of technical and non-technical areas to establish development and testing priorities and strategies
	+ Documents and describes release components to the clients/users and stakeholders
	+ Manages all risks associated with the testing and takes preventative action when any risks become unacceptable
* Manages the planning of UAT and coordinates the execution of the plans
	+ Plans test schedules or strategies in accordance with project scope or delivery dates
	+ Develops or specifies standards, methods, or procedures to determine product quality or release readiness
* Identifies improvements to the process and assists in their implementation
	+ Develops corrective action strategies in response to documented problems, and schedules and authorizes the implementation of new and revised programs
	+ Utilizes testing knowledge and experience to assess solutions and provide advice on the practicality of testing process alternatives
* Plans, arranges and controls meetings, workshops and relations with client/user staff during test planning and throughout subsequent development and testing activities
* Prepares and reviews test plans and reports
	+ Defines the scope of testing within the context of each release/delivery
	+ Identifies testing program deviance from standards, and suggest modifications to ensure compliance
* Monitors and reports on defect resolution efforts and track successes
	+ Oversees defect reporting and ensures software defects are documented per the approved test management approach and plan
	+ Manages the process of defect reporting and resolution
	+ Review historical, existing and ongoing test results and defect reports to identify areas needing specific attention
* Participates in product design reviews to provide input on functional requirements, product designs, schedules, or potential problems
* Provides feedback and recommendations to developers on software usability and functionality
 |
| **Knowledge & Skills** |
| * Functional knowledge of Software Testing theories and practices
* Experience using automated testing tools to execute test scripts and use cases
* Experience using a variety of tools (both manual and automated) to create, execute, and manage test cases and defects
* Proven success creating and managing the application of test processes and procedures to a software implementation project
* Ability to maintain project progress while dealing with challenges such as cross-team dependencies, changing schedules, and evolving requirements
* Ability to work independently and in a team
* Ability to manage State staff in the development of test scripts, test plans, expected results, and system problem documentation and resolution for User Acceptance testing
* Understands the discipline of testing and how to effectively implement a testing process while fulfilling the traditional leadership roles of a manager
* Excellent verbal communication skills and written communication skills
* Skilled in actively and effectively communicating with development and PM counterparts about critical issues
* Ability to communicate with staff at all levels, including executive-level management
* Proficient in the use of Microsoft Office products
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Implementation Manager / Team Lead | The Implementation Manager / Team Lead is responsible for ensuring consistency with the project goals. This role will lead the combined business and technical efforts to implement the system for the user stakeholders across the State of Tennessee. This effort includes, but is not limited to, the development and execution of an implementation plan that incorporates and coordinates the business and technical preparations and preparedness to effectively and efficiently deploy the new system. |  Management |   |  75% |
| **Responsibilities** |
| * Responsible for the distribution, implementation, and monitoring of the implementation
* Works with the Infrastructure Lead to ensure all coding on new software conforms with organizational security regulations
* Leads the development of an implementation plan which includes the preparation of all users’ physical facilities; the timing of training for users and support personal; the development, publishing and distribution of procedure manuals; phased rollout constraints; communication and collaboration with outside entities
* Develops the implementation schedule, identifies the resources and their participation levels required for the implementation effort
* Manages all aspects of the implementation effort
* Provides periodic status reports to the Project Management Team
* Manages the resources assigned to the Team
* Leads the management of project risks and issues related to the Team’s work and participates in the Project’s risks and issues management
* Participates in the evaluation of Change Requests
 |

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| **Implementation Manager / Team Lead****Knowledge & Skills** |
| * Experience in rolling out phased implementations across a large geographical area
* Ability to visualize and understand the “Big Picture” and maintain that vision while being absorbed in details
* Excellent people skills
* Good written and presentation skills
* Proficient in the use of Microsoft Office products
* Technical knowledge of the business and technical processes, procedures and constraints
* Strong leadership skills to coordinate the many aspect of the implementation effort from the concept to the operationalizing of the project
* Ability to lead technical and business resources to accomplish task in a timely manner
* Capable to accurately translate technical and business data into meaningful and understandable information for all user stakeholders
 |

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| --- | --- | --- | --- | --- |
| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| Training Team Lead | The role of the Training Team Lead is to be responsible for the development and execution of the Project Training Plan. The scope of the training will include business staff, all state users, technical support staff and operational staff. The plan must include the approach, the training logistics, and development of training material and review of training effectiveness. The Training Lead is an intricate member of the Project Management Team (PMT) and will participate in PMT activities. |   |   |  75% |
| **Responsibilities** |
| * Leads the development of the Project Training Plan which includes the objectives, logistics, target resources and schedule for preparing all DIDD application users and support staff to effectively and efficiently employ the new system to fulfill the Agency’s mission
* Manages and supervises all training aids (Curricula for the training sessions, Study guides, Quick reference cards, etc.)
* Manage all aspects of the training approach and effort
* Provides periodic status reports to the Project Management Team
* Identifies and manages the resources for the Training Team
* Leads the management of project risks and issues related to the Team’s work and participates in the Project’s risks and issues management
* Participates in the evaluation of Change Requests
 |

|  |
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| **Training Team Lead****Knowledge & Skills** |
| * Functional knowledge of Training theories and practices
* Experience providing process and technical training to business system users
* Excellent people skills
* Good written and presentation skills
* Proficient in the use of Microsoft Office products
* Technical knowledge of business and technical processes, procedures and constraints
* Strong leadership skills to coordinate the many aspect of the implementation effort from the concept to the operationalizing of the project
* Ability to lead technical and business resources to accomplish task in a timely manner
* Capable of accurately translating technical and business data into meaningful and understandable information
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Functional Lead | The role of the Functional Lead is to represent the customer’s business area for which work is being performed to execute and fulfill the Sponsorship’s operational vision. |   |   |   |
| **Responsibilities** |
| * Support the definition of business processes
* Determine and support the implementation of a business policy, generally by providing
	+ the contents for the business rules that enforce the policy
	+ the process contexts in which the rules are applied
* Oversee the execution of that policy via business rules applied. Such oversight includes confirming that the implemented rules fully and faithfully correspond to the intended policy
* Once Rule Writers have created the first set of rules, the SME reviews the rules, and the rule flow to give feedbacks on the logic and pattern used
* Review the results of testing and simulation
* Manage business vocabulary
* Resolve business issues relating to business rule execution
* Be accountable for the quality of the business rule
* Approve major changes to business rules
 |
| **Knowledge & Skills** |
| * Strong business knowledge and experience
* Some management skills
* Good oral and written communication skills
* Leadership
* Decision making skills
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Subject Matter Expert | The role of the Subject Matter expert is to help define general business requirements. |   |   |   |
| **Responsibilities** |
| * Support the definition of business processes
* Determine and support the implementation of a business policy, generally by providing
	+ the contents for the business rules that enforce the policy
	+ the process contexts in which the rules are applied
* Oversee the execution of that policy via business rules applied. Such oversight includes confirming that the implemented rules fully and faithfully correspond to the intended policy
* Review the results of testing and simulation
* Manage business vocabulary
 |
| **Knowledge & Skills** |
| * Strong business knowledge and experience
* Good oral and written communication skills
* Leadership
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Stakeholders | Those groups, units, individuals, or organizations, internal or external to the organization, which are impacted by, or can impact, the outcomes of the project. |   |   |   |
| **Responsibilities** |
| * Receives periodic status updates
* Provides input as requested regarding the product
* Participates in identified training
* Reviews final solution
 |
| **Knowledge & Skills** |
| * Business area knowledge
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Project Team | The Project Team will provide the day-to-day operation of the project. |   |   |   |
| **Responsibilities** |
| * Serves as full-time participants on the project
* Participate/leads specific project tasks in accordance with the project plan
* Facilitates work sessions and conduct interviews, as appropriate
* Ensures adequate project documentation is created and maintained
* Performs development of assigned deliverables, and ensure deliverables are completed on schedule
* Actively participates in developing project work products, refining business processes, and in developing, implementing and testing system requirements
* Anticipates problems proactively and make recommendations for improvements
* Resolves issues in a timely manner per the project issue escalation policy
* Actively participates in Project Team meetings and status reporting activities
* Reviews project deliverables in a timely manner in accordance with deliverable review process
 |
| **Knowledge & Skills** |
| * Depends on the role within the project
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Vendors | Individuals/Companies that provide products or services the project will require. |   |   |   |
| **Responsibilities** |
| * Develops, implements and tests the solution
* Provides training support for project agency technical team
* Supports the business training process by developing training documents and aids and training the trainers
 |
| **Knowledge & Skills** |
| * Proficiency in project’s core (primary) technology
* Proficiency in supporting technology areas
* Industry knowledge
* Ability to prepare comprehensive technical specifications
* Design skills
* Product knowledge
* Process knowledge
* Management of intellectual property
* Team and individual leadership
* Oral and written communication
* Conflict resolution
* Delegating
* Coaching and mentoring
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
| Conversion Team Lead | The Conversion Team Lead will lead the effort of converting legacy systems data to the new solution. This includes, but is not limited to, developing a project plan that describes the processes and procedures to be employed to identify the source data fields, the target data fields, conversion rules, development schedule, testing schedule and conversion risks. The Team Lead is an intricate part of the Project Team. |  Management |   |  75% |
| **Responsibilities** |
| * Develop and document an approach for identifying, converting and testing conversion data from the legacy systems to the new solution
* Develop the conversion schedule, identify the resources and their participation levels required for the conversion effort
* Manage all aspects of the conversion effort
* Provides periodic status reports to the Project Management Team
* Manages the resources assigned to the Team
* Leads the management of project risks and issues related to the Team’s work and participates in the Project’s risks and issues management
* Participates in the evaluation of Change Requests
 |
| **Knowledge & Skills** |
| * Excellent people skills
* Good written and presentation skills
* Proficient in the use of Microsoft Office products
* Technical knowledge of agency’s legacy systems (Manual and Automated)
* Strong leadership skills to take the conversion efforts from the concept to the tested and approved results
* Ability to lead technical resources to accomplish task in a timely manner
* Capable to accurately translating technical information into simple easily understood non-technical communications with the Project Management Team
 |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
|  |   |   |   |   |
| **Responsibilities** |
| *
 |
| **Knowledge & Skills** |
|  |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
|  |   |   |   |   |
| **Responsibilities** |
| *
 |
| **Knowledge & Skills** |
|  |

| **Role** | **Description** | **Authority** | **Name** | **% of Participation** |
| --- | --- | --- | --- | --- |
|  |   |   |   |   |
| **Responsibilities** |
| *
 |
| **Knowledge & Skills** |
|  |