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THE BIM MANAGER SURVIVAL GUIDE · EPISODE 2

Surviving the RACI

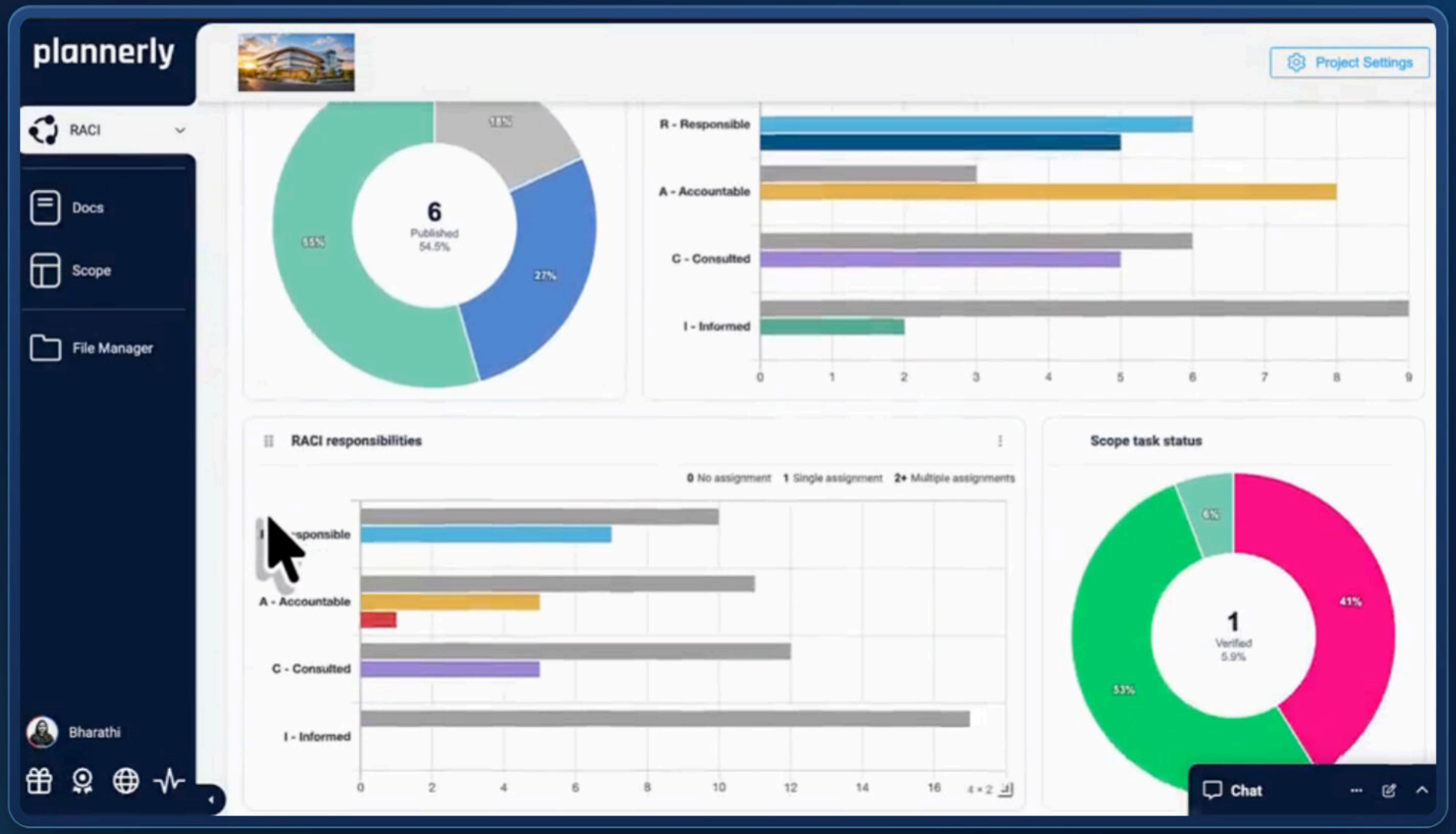
ACCOUNTABLE.
AGREED.
EVIDENCED.

Who owns it. Who agreed to it.
And the evidence that they actually delivered it.

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Three things a table can't do

Accountable RACI Intelligence | **Agreed** One-Click Contracts | **Evidenced** Commitment Tracking



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THE WHOLE DIFFERENCE

A table records who should have. Plannerly proves what actually happened.

RACI Intelligence finds the gaps before the project does.

One-Click Contracts turn it into something people will actually sign.

Commitment Tracking proves every one of them was delivered.

A QUESTION EVERY PROJECT ASKS EVENTUALLY

Who owns this one?



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LET'S BE HONEST

Nobody wants to chase people for something they don't feel accountable for.

And that's the job, most weeks. Not managing information - reminding people.

The matrix was supposed to stop that happening.

AND SO, PREDICTABLY

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Found it. Dave's responsible.

Appendix C

Responsibility matrix · Coordination activities

R = Responsible A = Accountable C = Consulted I = Informed

Activity	Dave	Priya	Sam	Alex
Federate discipline models	R	A	C	I
Maintain coordination issue log	R	A	C	I

Dave... who left in March?

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AND ISO 19650 DOESN'T HELP

It makes you feel like the goal is to fill in the grid.

Produce the matrix. Tick the clause. File it with the BEP.

Filling it in became the deliverable - instead of using it.

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AND WHAT'S THE END RESULT?

A table.

Not even in a spreadsheet, most of the time. A table, in a Word document.

And it goes in an appendix, at the back of the BEP.

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Appendix C

Last opened: during mobilisation.

Still names a structural lead who left in March.

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IT WAS TRUE ONCE

Written at mobilisation.
Never touched again.

People leave. Scope changes. **And most of the people named in it never saw it, let alone agreed to it.**

So when something goes wrong it is evidence of what you said you would do -

not a record of what anybody actually did.

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BUT THIS IS THE REAL PROBLEM

It isn't connected to anything.

The table sits in an appendix. The work happens in the CDE, the model, the register.

Nothing links "Team X is responsible for the MEP model" to the actual MEP model.

It's a document about the work, parked a very long way from the work.

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ONE MORE, AND WE'VE ALL DONE IT

Everyone is Consulted.

Nobody wants to be left off, so people mark themselves C or I on everything.

Real discipline is being willing to write nothing at all - and almost nobody is.

ADD IT ALL UP

This is where most responsibility matrices end up

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- ⚠ Nobody agreed to it
- ⚠ Two teams, both accountable
- ⚠ Still names someone who left
- ⚠ Everyone is Consulted
- ⚠ Not connected to the work
- ⚠ Gaps found at delivery
- ⚠ No record when it's disputed
- ⚠ And you, chasing all of it

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LIVE TODAY

We're retiring the responsibility table

LIVE DEMO · AND YOU CAN START DOING THIS FREE TODAY

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WHAT IF?

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WHAT IF

It was part of the work itself - not a document about it?

Built into the tasks and the document sections, inside the workflow that plans, tracks and controls them

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WHAT IF

You could see every gap?

Charted and filtered, before the project found them for you

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WHAT IF

People reviewed it before it was finished?

While it still mattered, and while they could still change it

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WHAT IF

Every team got only their own pages?

Twenty they'll read, instead of two hundred they won't

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WHAT IF

It chased and reported itself?

Reminders, read receipts and dashboards - without you

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WHAT IF

You could ask AI where the gaps are?

In plain language. And it goes and actually looks.

AND WE'RE SAVING THIS ONE FOR THE VERY END

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QUICK RECAP

Last episode, we built the delivery plan.

The TIDPs - each task team's own information delivery plan.

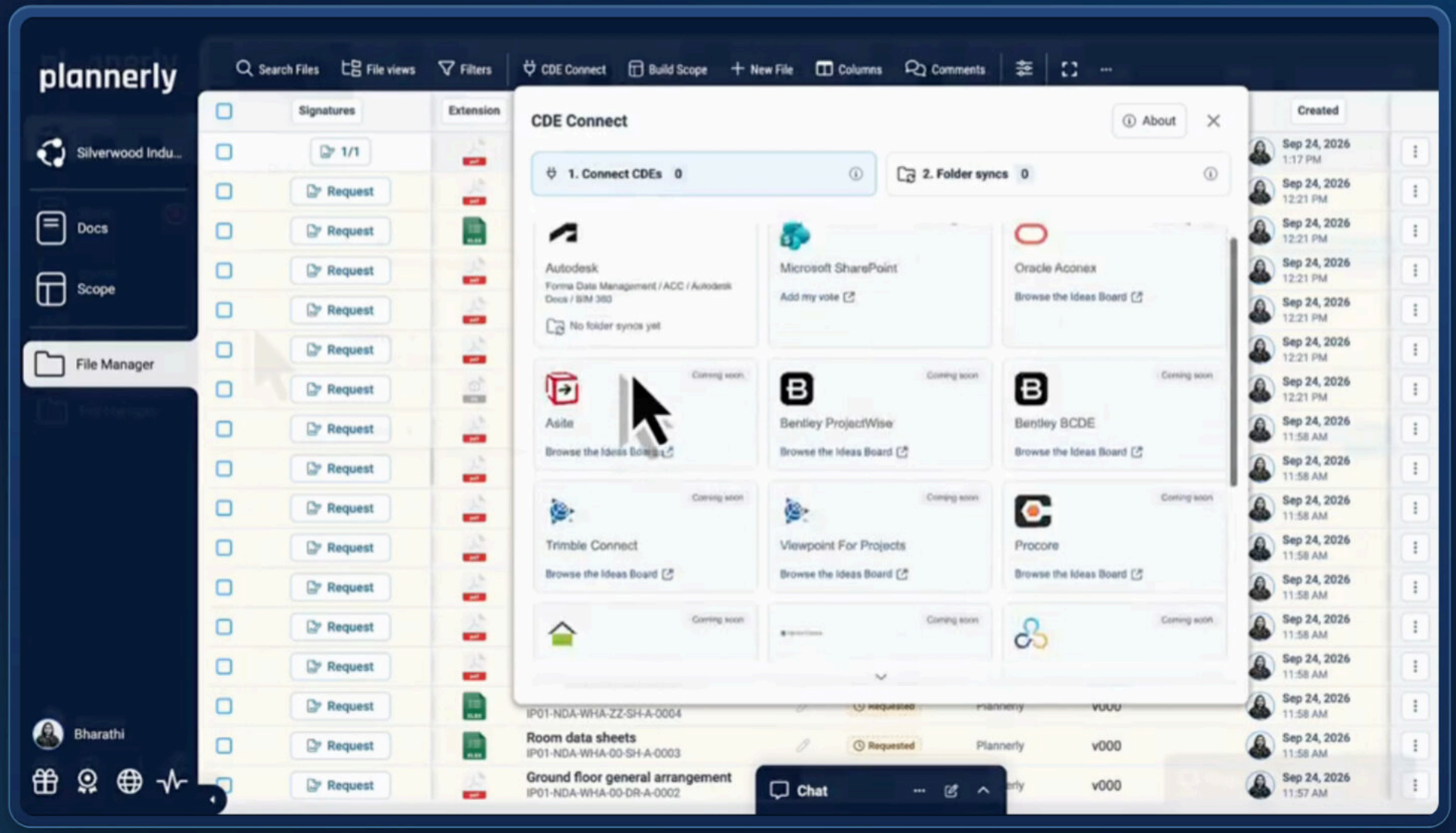
The MIDP - all of them consolidated into one master plan.

What's required, from whom, and by when.

THE SHORT VERSION

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And here's how simple that was



LAST EPISODE WE BUILT THE PLAN

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Now let's say who owns it

Four letters, and only one of them is routinely got wrong.

R

Responsible

The person who actually does the work

A

Accountable

The company that signed for it. One per row - the buck stops there

C

Consulted

Gets a say before it's finished, not after

I

Informed

Told once it's done. No input expected

Get the **A** wrong and the other three stop meaning anything.

Our RACI survival plan

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Three parts, two things in each. The same three words as the title.

1

Accountable RACI Intelligence

Assign the roles · Work it before it's finished

2

Agreed One-Click Contracts

One click, filtered contracts · Signatures collected for you

3

Evidenced Commitment Tracking

It reports itself · Ask it what's missing

STAY TO THE END FOR… NEW AI FEATURE PREVIEW | THE EXAMPLE PROJECT, YOURS TO KEEP | T-SHIRT PRIZE WHEEL

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PART 1 OF 3 · RACI INTELLIGENCE

ACCOUNTABLE.

Accountable is the company that signed. Responsible is the person doing the work.

Filter it, chart it, find the gaps - none of which you can do on a page in an appendix.

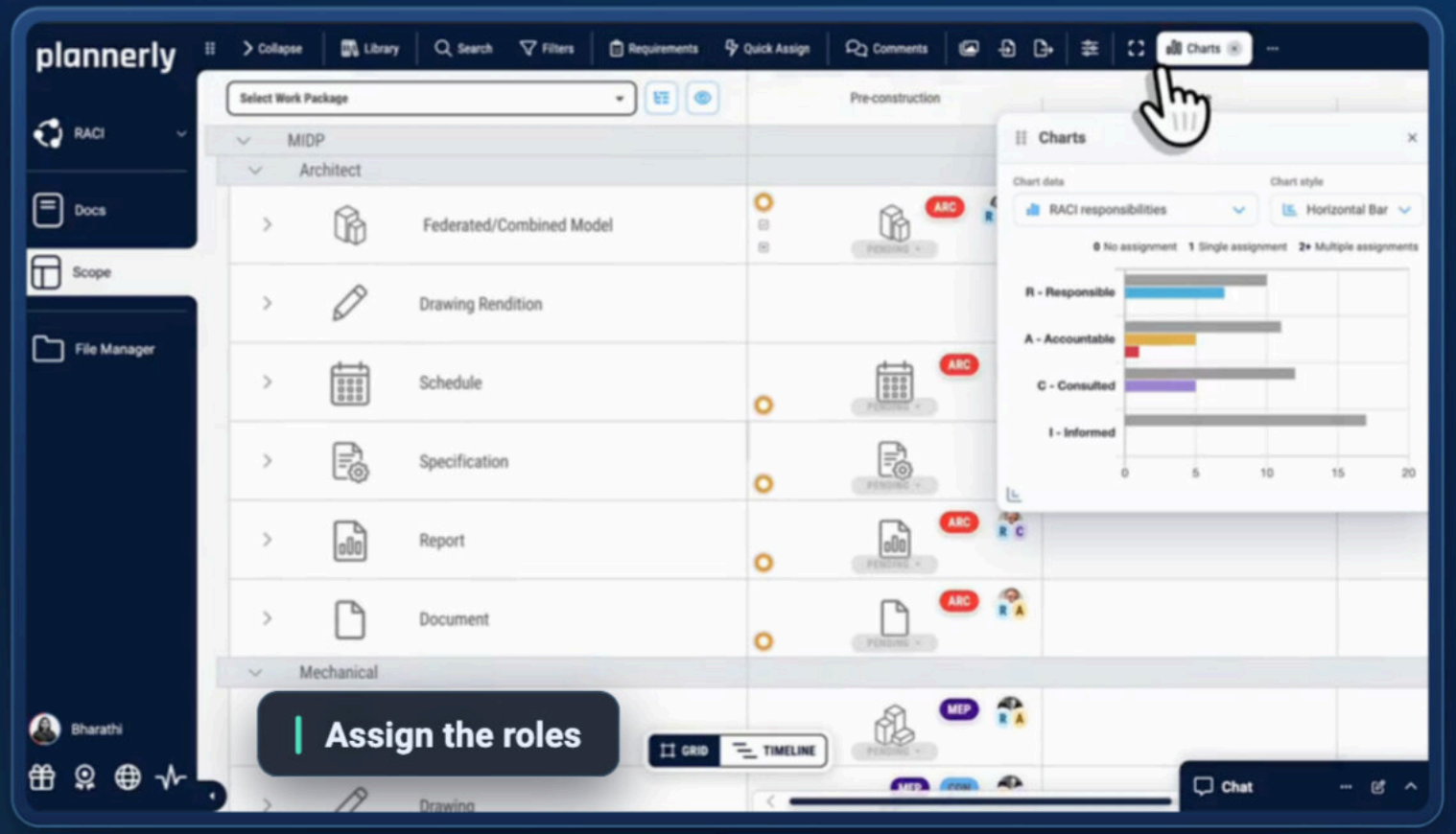
Accountable RACI Intelligence | **Agreed** One-Click Contracts | **Evidenced** Commitment Tracking

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Assign the roles

A responsibility you can filter, chart and check is a completely different object to one you can only read.

- **RACI onto the work itself**
  Document sections and scope tasks - teams, or named people
- **See your coverage at a glance**
  A chart that tells you whether everything is actually assigned
- **Find it, isolate it, filter it**
  Unassigned, over-assigned, and two accountable parties on one row
- **None of which a table can do**
  You cannot filter a page, or chart it, or ask it a question



ONE FOR THE CHAT

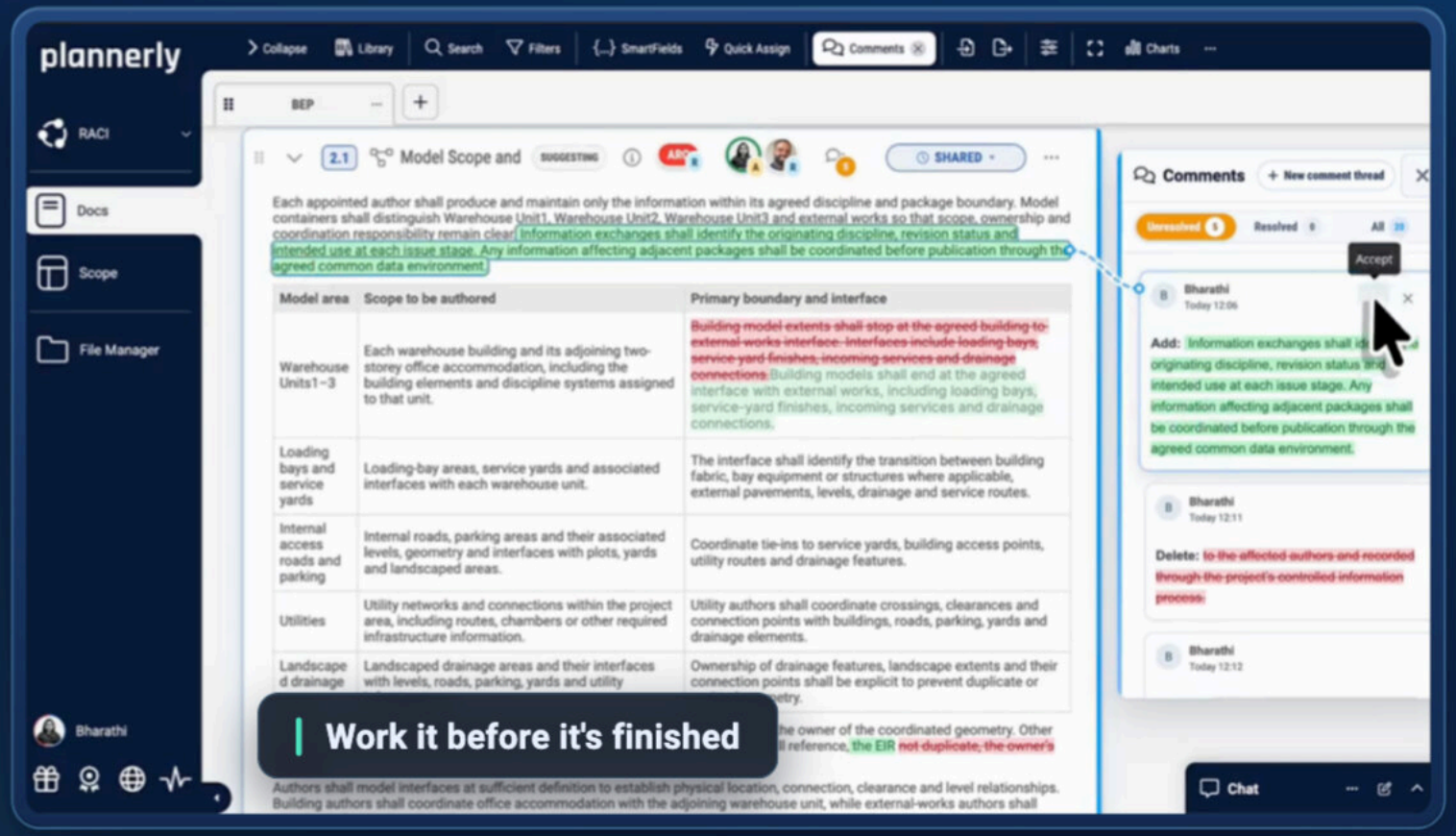
If your matrix could flag one thing automatically, what would you want it to catch?

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Work it before it's finished

Nobody feels accountable for something they first saw when it was already finished.

- **Review while it's being written**
  Not once it's done, when it's far too late to change anything
- **Suggestions, comments, conversations**
  On the section itself, with smart fields filling in as you go
- **Resolve, accept or reject, publish**
  A real acceptance process, not a circulated PDF
- **A clock on each section**
  The responsibility carries a date, and everyone can see it



ONE FOR THE CHAT

When's the best time to get input?

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PART 2 OF 3 · ONE-CLICK CONTRACTS

AGREED.

Nobody reads 200 pages. One click, and each team gets only theirs - signed.

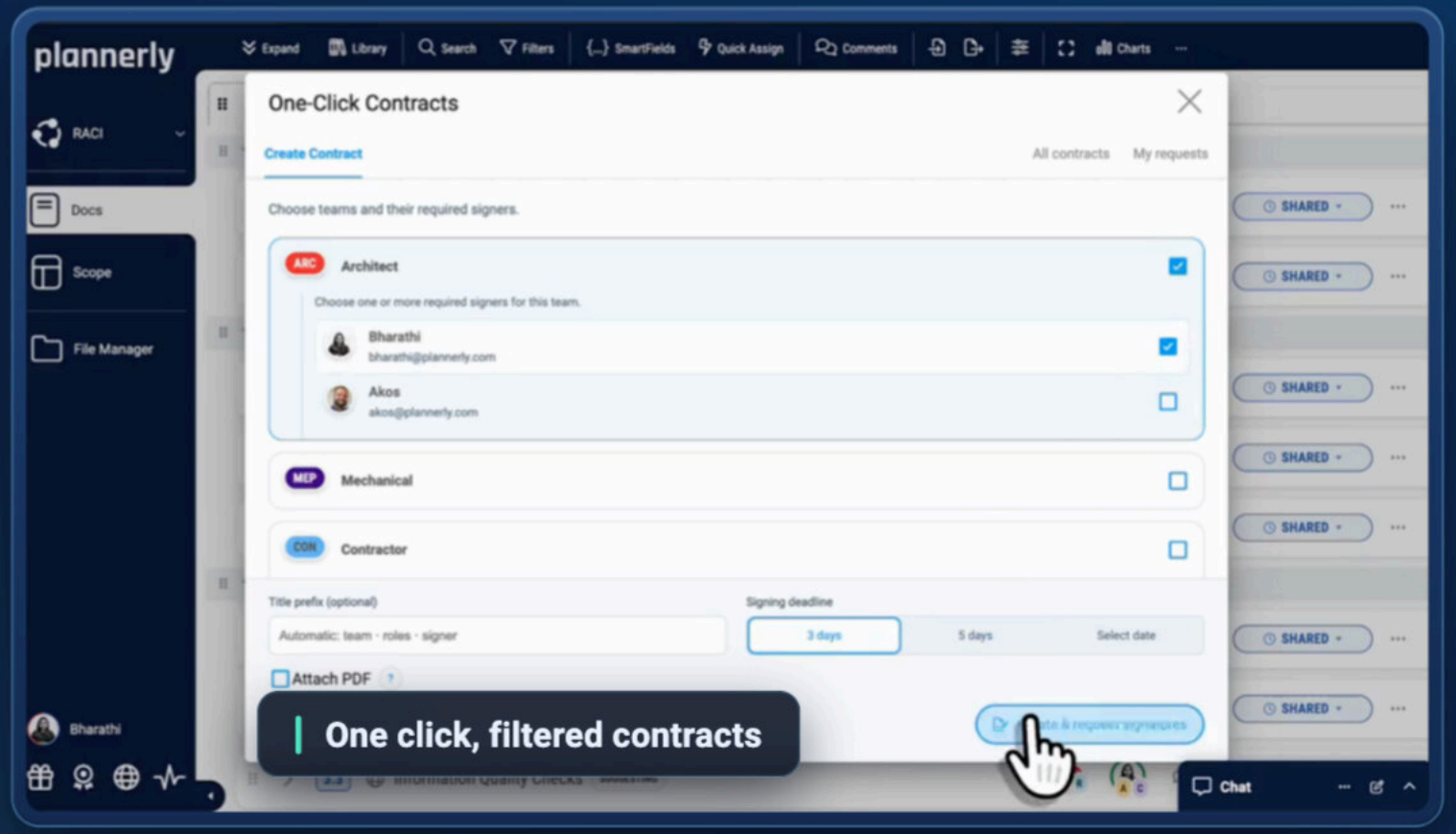
Accountable RACI Intelligence | **Agreed** One-Click Contracts | **Evidenced** Commitment Tracking

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One click, filtered contracts

Send somebody 200 pages and you get silence. Send them their 20 and you get a signature.

- **Every contract packaged in one click**
  No assembling, no weeks of admin
- **Filtered to that team's responsibilities**
  Or that individual's, where it sits with a person
- **Twenty pages they'll read**
  Instead of two hundred they won't
- **So the agreement is informed**
  They can actually see what they're taking on



ONE FOR THE CHAT

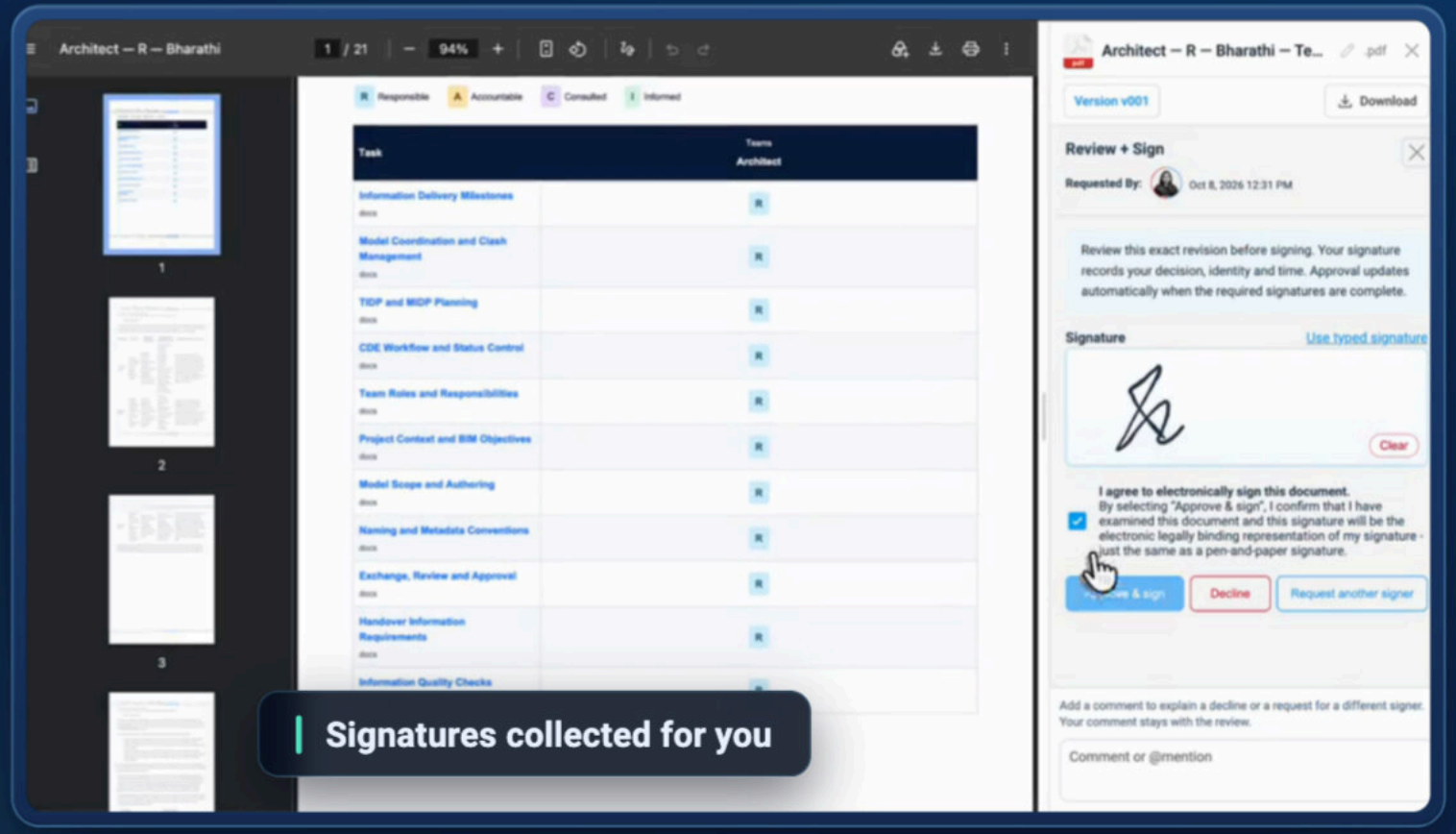
How many pages would you LIKE to send a subcontractor?

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Signatures collected for you

An agreement you can produce nine months later is the only kind that was ever worth having.

- **E-signature built in**
  Review, sign, done
- **Chased and collected automatically**
  Not a job anybody has to own
- **Signed, locked, and on the record**
  With the full audit trail behind it
- **Now the company is on the hook**
  And the person doing the work knows it too



ONE FOR THE CHAT

What's the one thing you'd want everyone to sign up to on your next project?

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PART 3 OF 3 · COMMITMENT TRACKING

EVIDENCED.

Consulted, Informed, Delivered. Tied to deadlines, and proved rather than assumed.

Accountable RACI Intelligence

Agreed One-Click Contracts

Evidenced Commitment Tracking

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It reports itself

Projects change. What you signed is never quite what you deliver - so the system has to keep up.

- **It opens in review mode**
  Straight to what changed since they last looked - not the whole document again
- **Green circles show who has read it**
  And when they last logged in. No guessing, and nobody has to ask
- **Commitments chase themselves**
  Reminders for what they signed up to, and deliverables ticking off as they arrive
- **Dashboards per project and per team**
  Scroll them side by side and compare one team against another



ONE FOR THE CHAT

What would you love your dashboard to tell you on a Monday morning?

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PREVIEWING TODAY · NEVER SHOWN PUBLICLY BEFORE

YOUR PROJECT ASSISTANT

Ask your project a question in plain language and it goes and looks -

across the matrix, the sections, the tasks and the people.

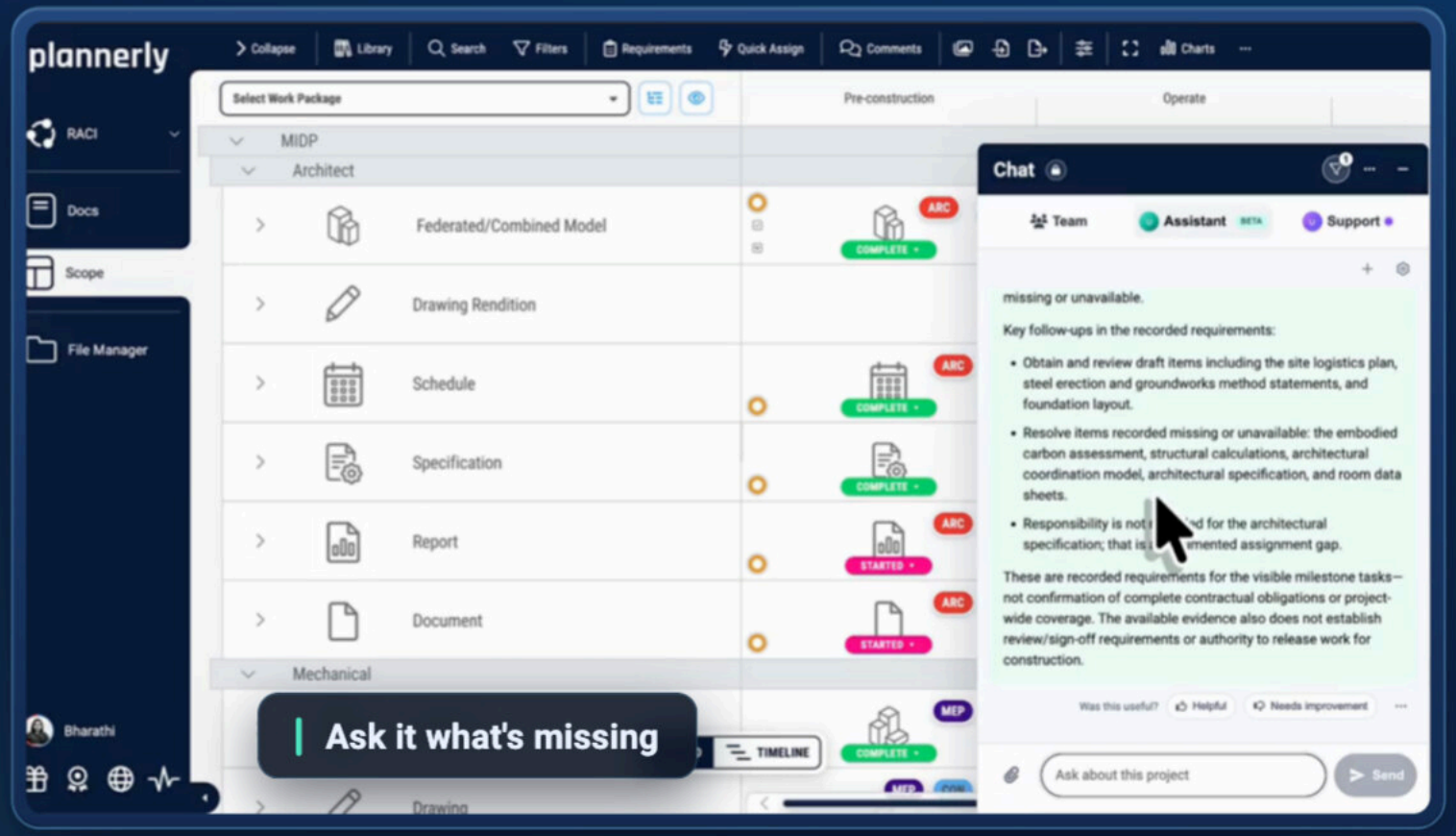
The thing we said we were saving for the end. You are the first room to see it.

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Ask it what's missing

The one we said we'd save for the end. Every other step made the matrix usable - this one makes it answerable.

- **The assistant is right there in the app**
  Not a separate tool, not a separate login
- **"Are there responsibility gaps?"**
  Ask in plain language, and it goes and looks
- **It answers with the evidence attached**
  The sections, the tasks, the people
- **The one thing a table could never do**
  Answer a question about itself



ONE FOR THE CHAT

What's the one question you'd ask about your project if you could just ask it?

Our RACI survival plan

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All three, end to end. That's the whole workflow.

✓ **Accountable** RACI Intelligence

Assign the roles · Work it before it's finished

✓ **Agreed** One-Click Contracts

One click, filtered contracts · Signatures collected for you

✓ **Evidenced** Commitment Tracking

It reports itself · Ask it what's missing

STAY TO THE END FOR… NEW AI FEATURE PREVIEW | THE EXAMPLE PROJECT, YOURS TO KEEP | T-SHIRT PRIZE WHEEL

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AND HERE'S THE THING

Your RACI and your MIDP are the same data.

Last episode we built the plan. Today we said who owns it.

They were never two documents - they're one set of records, looked at two ways.

Nothing to reconcile, nothing to keep in step, no version that disagrees.

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YOUR RACI SURVIVAL KIT

The example project we built is yours to keep

RACI already configured, ready to point at your own project.

Jump on the free plan and point it at your own project.

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ACCOUNTABLE. AGREED. EVIDENCED.

THANK YOU

RACI

Every step's full walkthrough - free: **plannerly.com/training**

Everything we ship, as we ship it: **app.plannerly.com/changelog**

Episode 3 - Surviving ISO 19650 Information Requirements: **same time, same link**