

# The 4 Main Characters of Business Projects

Understanding Key Roles That Make Projects Succeed

## Executive Summary

Project management is full of characters, but not everyone knows their role. At Tuck Consulting, we know small businesses struggle when people aren't sure who's supposed to do what. This guide breaks down the four "main characters" essential to any successful project: the Customer, the Project Manager, the Project Lead, and the Subject Matter Expert. If you want your project teams to communicate better, set realistic expectations, and create accountability, understanding these roles is the difference between project success and a horror story.

## Problem Statement.

Surprise: most projects don't go perfectly. Roughly 70% of projects miss their targets for scope, budget, or timeline—and for small businesses, those failures hit bigger. Having led thousands of projects across hundreds of organizations, we know the common culprits:

- Nobody's quite sure who's responsible for what
- Everyone has different ideas about what "done" looks like
- Information gets stuck in silos or team bubbles
- Resources get misallocated because requirements weren't clear
- Critical knowledge stays locked in one person's head

**These issues show up as ever-shifting requirements, loose deadlines, budget uncertainty, and scope creep. And it's not just one type of business, or one methodology: small businesses struggle when they don't clearly define who plays which role in their project story.**

# Solution: The Main Characters

Think of your project as a story with four main characters, each bringing their own perspective and skills to move the plot forward. When everyone knows their lines and plays well together, your project has the best odds of ending happily ever after. Here's who needs to be in your cast:

## The Customer.



### Who They Are

The Customer is who the project is ultimately for. In a small business, it could be CEO proposing a structural changes, or the marketing team that needs a website redesign. They are who will ultimately use and benefit from whatever you're creating.

### What They Do

- Define what they actually need from this project and why it matters
- Provide prompt, honest feedback
- Make the big decisions
- Give the final thumbs-up when the project is complete
- Champion the project within the organization

### What They Need

- **Plain Language:** Direct, informative business speak without the technical jargon
- **Decision Rights:** They have final say on any changes that affect timeline or budget
- **Operational Risk Awareness:** They worry about operational impact more than technical challenges
- **A Long View of Success:** For them, success means achieving business goals – project requirements are just a stepping stone

### The Bottom Line.

The customer defines your project's success. They can also stand in its way. Give them what they need to help push things forward, keep them informed without overwhelming detail, and remind them how they can support internally as a champion or as a guardrail.

## The Project Manager.



### Who They Are

The Project Manager keeps all the parts moving together. In many small organizations, this might be someone wearing many hats, but someone needs to own this role for the project to run smoothly. Whether dedicated to one role or multiple, make sure your PM has the time and resources to step back and oversee their projects.

### What They Do

- Create realistic plans and timelines
- Make sure resources are available when needed
- Keep everyone communicating – and keep key stakeholders informed
- Identify risks before they become issues or nightmares
- Make sure everyone follows the agreed-upon process

### What They Need

- **Big Picture Mentality:** Balance the triad of scope, time, and budget from 10,000 feet
- **Dependency Brain:** "What needs to happen first?" "How will this impact Y?"
- **A Love of Records:** They keep process documentation and meeting notes readily accessible for when memories fade
- **Flexibility:** Knowing elements can be adjusted gives the project team space to maneuver as conditions shift

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## The Project Lead.



### Who They Are

The Project Lead gets their hands dirty with the actual work. In a website project, this might be the lead developer. For an event, it could be the event coordinator. They direct the day-to-day efforts and make tactical decisions, and whether a lead or a team of individual contributors, they're the ones making it happen.

### What They Do

- Turn general requirements into specific actions
- Decide on the best technical approaches and clear any technical roadblocks
- Report on task progress, costs, and other key metrics
- Create and review the main deliverables

### What They Need

- **Work Ethic:** They take pride in work done well and model that effort for the team
- **Tactical Approach:** They focus on the nuts and bolts to make things happen
- **Thinking Ahead:** They make sure solutions can be maintained after they're gone
- **A Critical Eye:** Identify potential technical problems early and preemptively devise solutions with the PM

## The Subject Matter Expert.



### Who They Are

The Subject Matter Expert (SME) brings the specialized or technical knowledge that the project needs. For a small business inventory system, it could be someone who really understands accounting requirements, or for a sales software implementation, it could be a salesperson who knows your deal processes inside and out.

### What They Do

- Provide deep knowledge in specific areas
- Validate that approaches will work in the real world
- Ensure solutions follow industry regulations and best practices
- Review work for accuracy in their specialization

### What They Need

- **Deep Minds:** They know a lot in a narrow focus
- **To Advise and Consent:** They often consult rather than do the hands-on work
- **Compliance Mindset:** They ensure solutions meet industry standards and regulations
- **Ripple Effect Awareness:** They see how specialized decisions affect the bigger picture, and assist in identifying risks arising from technical consequences

# Watch Out For These Common Traps.

## **Role confusion**

Keep responsibilities clear to prevent "that's not my job" syndrome

## **Overloading people**

One person shouldn't play more than one main role

## **Proxy decision-making**

Make sure the right people have actual authority to make decisions

## **Static casting**

Regularly check if roles need to be reassigned as the project evolves



# Conclusion.

At Tuck Consulting Group, we've seen how defining these four main characters can transform project results for small businesses. By clearly outlining the roles of the Customer, Project Manager, Project Lead, and Subject Matter Expert, organizations can root out common causes of project failure: miscommunication, mismatched expectations, and unclear accountability.

Implementing this framework doesn't have to be complicated, but it does require intentionally thinking about who should be playing which role in your project story. Organizations that take this step typically see:

- Better alignment between what's needed and what's delivered
- More realistic planning and resource allocation
- Faster, clearer decision-making
- Earlier identification of potential problems
- Higher quality results with fewer do-overs
- Happier team members and customers

## **What You Can Do Today**

Take a look at your current project roles against our Main Characters Framework.

- Where are the gaps?
- Who's trying to play multiple conflicting roles?

Start a conversation about defining these roles more clearly for your next project, and reach out to us at Tuck Consulting Group if you'd like help implementing this approach in your organization. Your next project success story is waiting to be written!

**SCHEDULE TIME WITH TUCK.**

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