**Instructions:** For the suggested topics below, replace <text within brackets> with project specific information. Some of the topics may not apply to all projects. In the topics where a response is optional, a choice*,* [“N/A for this report”], is included in the instructions.

**CHANGE ALL:**

* **<Project Name> to your project name**

<Project Name>

Project Charter

|  |  |
| --- | --- |
| Current Version: | <current version number> |
| Owner: | <work product owner name> |
| Date Last Updated: | <last update date> |
| Last Updated By: | <update author name> |
| Author: | <author name> |
| Date Created: | <creation date> |
| Approved By: | <approving body> |
| Approval Date: | <date of approval> |

Revision History

[Purpose of this section: Record changes to this document, making an entry for each new document version. Include a summary of significant changes that would be helpful to the reader to understand how the composition has changed over time. Consider using revision bars to highlight changes made in future versions of this document.]

|  |  |  |  |
| --- | --- | --- | --- |
| **Version Number** | **Date Updated** | **Revision Author** | **Brief Description of Changes** |
|  |  |  |  |
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# Introduction

A project charter formally outlines a project and covers the scope of what the project will achieve, the people involved, milestones, budget, and possible risks. Many organizations consider this document an essential part of project planning. However, it’s not the same as a project plan because it doesn’t get into the details of individual tasks within the project.

# Project Scope

Project scope helps to distinguish what is and is not involved in the project and controls what is allowed or removed as it is executed. Scope management establishes control factors that can be used to address elements that result in changes during the project’s lifecycle.

## Mission Statement

[Purpose of this Section: Provide a brief statement identifying the Purpose of the project and the goal that it is intended to meet. Reference the work done in the Clarify Goals task of the Develop Process Design activity.]

## Project Objectives

[Purpose of this Section: Document the project’s objectives identified in the Clarify Goals task of the Develop Process Design activity. Resolve any inconsistencies between Project Brief and Scope identified through current Project Objectives. Document the Project Scope exclusions here. Attach, if required, any Project Scope statements here.]

## Included Scope

[List the business processes and application functionalities for the requested initiative.]

## Excluded Scope

[Explicitly list the business processes and application functionalities that are not in scope for the requested initiative.]

# Resources

[Purpose of this Section: Provide a list of the members of the Project Team participating in Plan Phase activities. Indicate the business unit where they will work and their responsibilities to the project.]

## Key Stakeholders

A key stakeholder is among the most important stakeholders for a project. They are individuals with a high interest in the project’s success and possess the power for the project to achieve its objectives. Key Stakeholders can prevent the project from achieving its complete set of goals and may cause it to fall.

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| --- | --- |
| **Key Stakeholder’s Name** | **Position** |
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## Stakeholders

A stakeholder is an individual, group, or organization impacted by the outcome of a project or business venture. Stakeholders are vital because they can positively or negatively influence the project with their decisions. Stakeholders are interested in the project’s success and can be within or outside the organization sponsoring the project.

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| --- | --- |
| **Stakeholder’s Name** | **Position** |
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## Initial Project Teams

The project team is responsible for executing the tasks and producing deliverables outlined in the project plan and schedule. Project teams are comprised of many different roles, such as project managers, subject matter experts, business analysts, and other stakeholders. Project team members may or may not be involved during the entire life cycle of a project and may or may not be full-time in the project.

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| --- | --- |
| **Team Member** | **Position** |
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## Venders

Venders are service providers who provide products and services to assist in project execution. Vendors may provide one-off solutions or resources during the life of the project. A Vendor Management strategy is documented within the Project Plan; keeping track of contracts, terms, payments, and communication becomes complex.

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| --- | --- |
| **Team Member** | **Position** |
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# Project Dependencies

[Purpose of this Section: Identify any existing systems or planned/in-process developments which may affect or may be affected by the success of this project. An understanding of any related efforts is crucial to managing expectations and timetables.]

# Recommended Project Strategy

[Purpose of this Section: Define the approach which offers the most significant potential benefits. Factors to consider: what can be done to help achieve project objectives, what tools and techniques are available, and which tools and techniques seem best suited to the needs of this project. This section’s key input is the Develop Process Design Activity output.]

## Project Strategy

[Purpose of this Section: Document the strategies identified in the Clarify Goals task of the Develop Process Design activity. Additionally, document the implementation strategy as developed in the Develop Process Design activity’s Perform Implementation & Process Management Planning task.]

## Proposed Technology

[Purpose of this Section: Document the IT Architecture vision, which states at a high level the technology that will be used to deliver a product solution for the project. This information is developed as part of the Develop To-Be Design task of the Develop Process Design Activity.]

## Process Critical Success Factors

[Purpose of this Section: Document the Process Critical Success Factors (CSFs) identified in the Clarify Goals task of the Develop Process Design activity.]

## Business Value

[Purpose of this Section: Document the business value as determined from the Perform Business Value Analysis task of the Develop Process Design activity. Attach the Business Case document if created by the Business Project Champion. Project Manager shall coordinate and provide details to Business Project Champion to create a Business Case document for the project.]

## Organizational Change Issues

[Purpose of this Section: Define all unresolved issues pertaining to organizational change that affect the project.]

# Executive Project Charter

|  |  |  |
| --- | --- | --- |
| Objective:  [Copy the Objective from the Business Case. Resolve any inconsistencies between the Business Case and current perception.] | | Business Case:  **Business Value:** [Copy the Business Value from the Business Case. Resolve any inconsistencies between Business Case and current perception.]  **Quantitative Benefits**: [Copy the Quantitative Benefits from the Business Case Financial Planning Tool. Resolve any inconsistencies between Business Case and current perception.] |
| Scope | |
| Includes:   * [List the business processes and application functionalities in scope for the requested initiative.] | Excludes:   * [Explicitly list the business processes and application functionalities that are not in scope for the requested initiative.] | Coordination Points:   * [List the key business & IT functions that would have to be coordinated. Also, list any other initiatives that has an impact on the requested initiative.] |
| Target Dates:   * [Describe any hard deadlines mandated by external events like govt. regulation, competitive scenario or key customer needs, etc., that would have act as a milestone constraint for the project schedule.] * [Start with a high-level ‘guesstimation’ of key project milestones like requirements, design, architecture, etc., around the hard milestone constraints if any. This can be refined subsequently based on ROM estimation and high level project scheduling.] | | Dependencies:   * [List some of the key external as well as internal dependencies for the successful execution of the initiative like resources with specialized/uncommon skill sets, management commitment, business resources availability, completion of dependent tasks or deliverables from other initiatives etc.] |
| Approach:   * [Describe any project-specific strategy, processes & structure that are planned to be adopted to execute the project. This may be things like 1st doing detailed requirements followed by a product selection followed by implementation or quick prototyping followed by a go/no-go decision by business etc. From a process perspective, describe any deviations to the standard waterfall development lifecycle process to be adopted for this initiative like the agile approach etc.] | | Assumptions:   * [List all the key assumptions that have been taken in to account to arrive at the approach and plan for the project.] |
| Resources and Roles   * [List the key business stakeholders that would be involved in this initiative.] * [List the key IT resources that would be involved in the Plan phase.] | | Key Business Risks:   * [List all the risks that have been identified to have a bearing on the scope, schedule and cost of the project. Also, describe the mitigation steps planned to address the risks.] |