Odoo Migration Project Charter

Project Overview

- **Project Name:** [Business Name] Odoo Migration
- **Project Manager:** [Name and Contact]
- **Technical Lead:** [Name and Contact]
- **Business Sponsor:** [Name and Contact]
- **Target Go-Live Date:** [Date]

Current State Analysis

- **Current Odoo Version:** [Version]
- **Database Size:** [Size in GB]
- **Number of Users:** [Active Users]
- **Custom Modules:** [List with Version Info]
- **Key Integrations:** [List External Systems]
- **Business Critical Processes:** [List and Priority]

Migration Objectives

- **Primary Objective:** [Main Business Goal]
- **Success Criteria:** [Measurable Outcomes]
- **Performance Targets:** [Specific Metrics]
- **Compliance Requirements:** [GDPR, HIPAA, etc.]

Scope and Constraints

In Scope:

- ☐ Database migration from [Version] to [Version]
- ☐ Custom module updates and testing
- ☐ Integration reconfiguration
- ☐ User training and documentation

Out of Scope:

- ☐ New feature development
- ☐ Business process redesign
- ☐ Additional integrations

Constraints:

- **Budget:** [Amount and Approval Authority]
- **Timeline:** [Hard Deadlines and Dependencies]
- **Resources:** [Team Availability and Skills]
- **Technical:** [Infrastructure Limitations]

Risk Assessment

Risk Category	Probability	Impact	Mitigation Strategy
Data Loss	Low	High	Comprehensive backup strategy
Extended Downtime	Medium	High	Zero-downtime migration approach
Integration Failure	Medium	Medium	Thorough testing in staging
User Adoption	High	Medium	Training and change management

Communication Plan

- **Stakeholder Updates:** [Frequency and Format]
- **User Communications:** [Timeline and Channels]
- **Escalation Procedures:** [Contact Tree and Thresholds]
- **Go-Live Announcement:** [Communication Strategy]

Success Metrics

- **Technical Metrics:**

  - System availability: >99.9%
  - Performance improvement: >20%
  - Data integrity: 100%
  - Security compliance: 100%

- **Business Metrics:**

  - User satisfaction: >90%
  - Process efficiency improvement: >15%
  - Support ticket reduction: >30%
  - Training completion: 100%

Project Timeline

[Detailed timeline with milestones, dependencies, and critical path]

Budget and Resources

- **Software Costs:** [Licensing and Third-party Tools]
- **Hardware/Infrastructure:** [Server, Storage, Network]
- **Professional Services:** [Consulting and Support]
- **Internal Resources:** [Team Time and Opportunity Cost]

Approval and Sign-off

- **Business Sponsor:** [Name, Date, Signature]
- **IT Leadership:** [Name, Date, Signature]
- **Project Manager:** [Name, Date, Signature]