

4.1.2 Develop Project Charter: Tools and Techniques

4.1.2.1 Expert Judgment

Expert judgment is often used to assess the inputs used to develop the project charter. Expert judgment is applied to all technical and management details during this process. Such expertise is provided by any group or individual with specialized knowledge or training and is available from many sources, including:

- Other units within the organization,
- Consultants,
- Stakeholders, including customers or sponsors,
- Professional and technical associations,
- Industry groups,
- Subject matter experts (SME), and
- Project management office (PMO).

4.1.2.2 Facilitation Techniques

Facilitation techniques have broad application within project management processes and guide the development of the project charter. Brainstorming, conflict resolution, problem solving, and meeting management are examples of key techniques used by facilitators to help teams and individuals accomplish project activities.

4.1.3 Develop Project Charter: Outputs

4.1.3.1 Project Charter

The project charter is the document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities. It documents the business needs, assumptions, constraints, the understanding of the customer's needs and high-level requirements, and the new product, service, or result that it is intended to satisfy, such as:

- Project purpose or justification,
- Measurable project objectives and related success criteria,
- High-level requirements,
- Assumptions and constraints,
- High-level project description and boundaries,
- High-level risks,
- Summary milestone schedule,
- Summary budget,
- Stakeholder list,
- Project approval requirements (i.e., what constitutes project success, who decides the project is successful, and who signs off on the project),
- Assigned project manager, responsibility, and authority level, and
- Name and authority of the sponsor or other person(s) authorizing the project charter.

4.2 Develop Project Management Plan

Develop Project Management Plan is the process of defining, preparing, and coordinating all subsidiary plans and integrating them into a comprehensive project management plan. The key benefit of this process is a central document that defines the basis of all project work. The inputs, tools and techniques, and outputs for this process are depicted in Figure 4-4. Figure 4-5 depicts the data flow diagram of the process.



Figure 4-3. Develop Project Charter Data Flow Diagram