

## Activity Overview - Draft a project charter

In this activity, you will begin drafting the project charter for Sauce & Spoon's tabletop menu tablets project by reviewing related project and company documents.

Keep in mind that project charters can differ significantly from project to project and company to company. However, most charters include some variation of the components described in this activity. No matter what form they take, charters lay out project goals, highlight benefits, and help keep stakeholders aligned.

## Scenario

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Review the scenario below. Then complete the step-by-step instructions.

Sauce & Spoon is a small restaurant chain that wants to meet its annual growth and expansion goals. As one way to meet these goals, they've decided to launch a pilot project to test out the impact of installing new tabletop menu tablets. The new menu tablets will allow the restaurant to serve more guests in less time and will also provide valuable data that will help Sauce & Spoon meet its business goals.

The company just hired Peta as their first in-house project manager to oversee the tablet rollout. To get started on the project charter, Peta spends some time reviewing the documents provided by Sauce & Spoon and meets with some of the project's stakeholders to get familiar with the project and the company.

**Note:** *In this activity and throughout the course, you will follow Peta as she guides her team through planning and executing the project deliverables and follow the project throughout its life cycle. As you do, you'll record details of the project to help you complete course activities. You will learn what works and what doesn't, and how to problem-solve your way through a project.*

## Step-By-Step Instructions

### Step 1: Access the template

To use the template for this course item, click the link below and select "Use Template."

Link to template: [Project Charter Template](#)

OR

If you don't have a Google account, you can download the template directly from the attachment below.

[Activity Template Project Charter](#)

[DOCX File](#)



## Step 2: Access the supporting materials

The following supporting materials will help you complete this activity. Keep them open as you proceed to the next steps. Each link will open a new Coursera tab.

- [Sauce & Spoon Menu Tablets Project Proposal](#)
- [Meeting: Clarifying Project Goals](#)

## Step 3: Review the supporting materials

Review the project proposal and meeting transcript. Take notes, keeping in mind you will be responsible for drafting the following sections of the project charter:

- Project summary
- Goals
- Deliverables

You should make note of any other relevant project information as well. You may add this information to your notes or the project charter.

## Step 4: Add the project name and date to your project charter draft

Refer to the supporting materials and add an appropriate project name and today's date to the project charter.

## Step 5: Add the project summary to your project charter draft

Draft a project summary, drawing on the supporting materials. The goal of the summary is to describe the project and give a high-level overview of its aims. It should be brief and to the point—no longer than a short paragraph, or one to three sentences.

You can leave your summary in draft form for now. You will have the opportunity to finalize it as you progress through the upcoming activities.

## Step 6: Identify the project goals

Draft a list of 4-8 project goals found in the supporting materials. Some goals are stated explicitly, while others are suggested or implied. Review the materials carefully to identify as many goals as you can.

Project goals answer the question “why are we doing this project?” Ask yourself:

- Why do stakeholders want to do this project?
- What will the project resemble when completed?
- How will you know the project is done and when it is done?
- How will you know the project has been completed successfully?

You can leave your list of goals in draft form for now. You will have the opportunity to add to them and make them more specific as you progress through the upcoming activities.

### **Step 7: Determine the deliverables**

Refer to the supporting materials and draft a list of 5-9 deliverables. Deliverables are specific tasks and tangible (or intangible) outcomes that enable the team to meet project goals.

You can leave your list of deliverables in draft form for now. You will have the opportunity to add to them and make them more specific as you progress through the upcoming activities.

### **Step 8: Save your work**

Be sure to save the project charter you drafted for this activity. You will revise and refine project artifacts, including the project charter, as you progress through the course.

### **Pro Tip: Save the template**

Finally, be sure to save the template you used to complete this activity for further practice or to use in your own personal or professional projects. These templates will be useful as you put together a portfolio of project management artifacts that you can speak to in an interview to demonstrate your experience to potential employers.

## **What to Include in Your Response**



Be sure to include the following elements in your project charter draft:

- A project name and date
- A 1-3 sentence summary that provides an overview of the project

- 4-8 project goals found in the supporting materials
- 5-9 project deliverables found in the supporting materials