Project Charter and Scope Statement: Automated Onboarding Platform (ACOP)

Phase: Project Planning Phase **Date:** November 10, 2025 **Prepared By:** Project Management Office (PMO) **Document Status:** Final v1.0 (Authorized)

1.0 Project Authorization

This document formally authorizes the **Automated Customer Onboarding Platform (ACOP)** project, confirms its objectives, and establishes the initial management framework.
- **Project Sponsor:** [Executive Name], VP of Operations
- **Project Manager:** [Assigned PM Name]
- **Project Start Date:** December 2025
- **Target Go-Live Date:** Q4 2026

2.0 Project Scope Definition

The scope defines the definitive boundaries of the project. Any work requested outside of these boundaries will be handled via a formal Change Request process.

2.1 Inclusions (In Scope)

1. Development of a web-based, fully responsive **Self-Service Portal** for customer data submission.
2. Creation of a secure **API layer** to validate customer-submitted data.
3. Integration with the existing **CRM system** for seamless data flow.
4. Functionality for **secure document upload** and storage.

2.2 Exclusions (Out of Scope)

1. Development of native mobile applications (iOS/Android).
2. Migration of historical customer data from legacy systems.
3. Integration with third-party payment processing gateways.
4. Advanced management-level analytics dashboards (to be handled in Phase II).

3.0 Estimated Budget and Resources

This is a preliminary budget based on high-level estimates.

Category	Estimated Cost Range	Contingency
Personnel (Salaries, Contractors)	$450,000 - $550,000	10%
Software & Licensing (Cloud, API Fees)	$50,000 - $75,000	5%

Category	Estimated Cost Range	Contingency
Total Estimated Budget	**$500,000 - $625,000**	**$50,000**

Key Resources: The project will require a dedicated team including a Project Manager, a Business Analyst, two Full-Stack Developers, one QA Specialist, and part-time support from the CRM System Administrator.

4.0 High-Level Milestones

Milestone ID	Deliverable	Target Completion	Dependent On
M1	Requirements and Design Documents Approved	End of Month 4	M1 requires Concept Memo approval.
M2	Core System Build Complete (Beta Ready)	End of Month 8	M2 requires M1 completion.
M3	User Acceptance Testing (UAT) Complete	End of Month 11	M3 requires M2 completion.
M4	Production Go-Live and Project Closure	End of Month 12	M4 requires M3 completion.