Project Charter

for

<Project>

Version 1.0 approved

Prepared by <author>

<organization>

<date created>

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# Project Description

<Provide a concise summary of the intent and motivation for the project. This section could describe the business problem the project is intended to solve or the business opportunity it’s intended to create or exploit. There might be a specific final deliverable or goal to call out. You could incorporate a summary of the business case that explains why the organization wants to undertake the project. This is a good template for a problem statement:

**Situation** *Describe the background, context, and environment.*

**Problem** *Describe the business problem (or problems) as you now understand it*

**Implication** *Describe the likely results if the problem isn’t solved.*

**Benefit** *State the business value of solving the problem.*

**Vision** *Describe what the desired future state would look like.>*

# Business Objectives and Success Criteria

<Describe the important business objectives of the product in a way that is quantitative and measurable. These could include revenue increase, cost savings, return on investment, or target release dates. Determine how success will be defined and measured on this project. Describe the factors that are likely to have the greatest impact on achieving that success. Establish measurable criteria to judge whether project has met its business objectives.>

# Stakeholders

*<Stakeholders are individuals, groups, or organizations that are actively involved in a project, are affected by its outcome, or can influence its outcome. The stakeholder profiles identify the project sponsor, project manager, customers for this product, and other stakeholders. Identify business-level customers, target market segments, and significant user classes. For each stakeholder category, describe the major benefits they will receive from the product, their likely attitudes toward the project, what constitutes a win or success for the stakeholder, and any known constraints that must be accommodated. You might include a table that lists affected business areas and organizations and describes the impact the project will have on them.*

There are many ways to record stakeholder profiles. Here’s one template:>

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Stakeholder** | **Roles** | **Interests** | **Influence** | **Needs** | **Concerns** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Vision

<Write a concise vision statement that summarizes the purpose and intent of the new product and describes what the world will be like when it includes the product. The vision statement should reflect a balanced view that will satisfy the needs of diverse stakeholders as well as those of the developing organization. The vision should be grounded in the realities of existing or anticipated customer markets, enterprise architectures, organizational strategic directions, and cost and resource limitations.

This is a good template for a vision statement:

**For** *target customer*

**Who** *statement of the need or opportunity*

**The** *product name*

**Is** *product category*

**That** *major capabilities, key benefit, compelling reason to buy or use*

**Unlike** *primary competitive alternative, current system, current business process*

**Our product** *statement of primary differentiation and advantages of new product*>

# Project Scope

<The project scope defines the range of the proposed products and services the project will deliver. Scope can be represented using a context diagram, an event list, and/or a feature tree or feature table. Scope might be subdivided into the scope of the initial product release and planned growth strategies for subsequent releases. It’s also important to define what the project will **not** include, so describe limitations and exclusions, such as product features or characteristics that a stakeholder might anticipate, but which are not planned to be included in the project.>

# Assumptions and Dependencies



<Record any assumptions that were made (as opposed to known facts) when conceiving the project. Note any major external dependencies the project must rely upon for success, such as specific technologies, third-party vendors, development partners, or other business relationships. Also identify any other projects that are related to this project in some way or may have a bearing on its outcome. Give each item a unique identifier, like those shown below.>

AS-1:



DE-1:



# Constraints

<Describe the priorities among the project’s requirements, schedule, and budget. The table below may be helpful in identifying the parameters around the project’s key drivers (top priority objectives), constraints to work within, and dimensions that can be balanced against each other to achieve the drivers within the known constraints. Examples:>

|  |  |  |  |
| --- | --- | --- | --- |
| **Dimension** | **Driver (state objective)** | **Constraint (state limits)** | **Degree of Freedom (state allowable range)** |
| Schedule | release 1.0 to be available by 10/1, release 1.1 by 12/1 |  |  |
| Features |  |  | 70-80% of high priority features must be included in release 1.0 |
| Quality |  |  | 90-95% of user acceptance tests must pass for release 1.0, 95-98% for release 1.1 |
| Staff |  | maximum team size is 1 PO, 1 BA, 6 developers, 3 testers |  |
| Cost |  |  | budget overrun up to 15% acceptable without sponsor review |

# Milestones

<Include a list of major project milestones and key deliverables, their target dates, and the team role or individual who is responsible for each one. It's not necessary to include the target date for each milestone unless they are fixed constraints.>

|  |  |  |
| --- | --- | --- |
| Event or Deliverable | Target Date | Responsibility |
|  |  |  |
|  |  |  |
|  |  |  |
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# Business Risks

<Summarize the major business risks associated with this project, such as marketplace competition, timing issues, user acceptance, implementation issues, or possible negative impacts on the business. Estimate the severity of each risk’s potential impact and identify any risk mitigation actions that could be taken. This is **not** the place for the project’s overall risk list.>

|  |  |  |  |
| --- | --- | --- | --- |
| Risk | Probability | Impact | Mitigation |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Resources

<Enumerate the known resources that management is willing to commit to the project at this time. Human resources include key individuals, teams, organizations, contractors or vendors, and support functions. This is **not** the place for the detailed team staff roster of individual names. Identify critical skill sets that team members must have. Other resources could include funding, computers, other equipment, physical facilities such as buildings and rooms, hardware devices, software tools, and training. If the project team organization is known at the time of chartering, include that information here, perhaps in the form of an organization chart.>

|  |  |
| --- | --- |
| Resource | Description and Source |
|  |  |
|  |  |
|  |  |

# Approvals

<Indicate the status of the charter following submission for approval. List the names and positions of the individuals who must approve the charter, particularly the project sponsor. You may wish to add some descriptive text to make sure all of these individuals agree on what their signature of approval means. For example, approving the charter could mean that the signatory agrees with the content as presented here, agrees to use this charter as a basis for the project, and agrees to keep the information in the charter current and relevant.>

**Approval Decision:**

* Approved, development of detailed project plan is authorized
* Approved, project execution is authorized
* Approved, but project is on hold until future notice
* Revise charter and resubmit for approval
* Charter and project proposal are rejected

|  |  |  |
| --- | --- | --- |
| Role or Title | Name and Signature | Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Date | Reason For Changes | Version |
|  |  |  |  |
|  |  |  |  |