

## Project Charter Potential Solution

Charter Item	Comments
Project Name	ABC annual new investor dinner
Project Goal	Organize a dinner for 40 potential investors. The goal is to gain business for the ABC firm.
Project Value Proposition and Benefits	<ul style="list-style-type: none"> <li>Present ABC's investment portfolio to potential investors over a pleasant dinner</li> <li>Increase overall customer base. Each potential investor brings an average of \$12,000 in revenue annually</li> <li>Continue to compete with similar businesses</li> </ul>
Problem or Opportunity Statement	The investment market is highly competitive. This dinner allows ABC to meet with prospective investors before they solicit the services of a competitor.
Project Schedule	Planning Starts: 1st March 2023  Event Date: 30th June 2023
Project Manager	Sidney Morris
Approval Authority/Sponsor	Martha Wilson
Assumptions or Constraints	Assumptions: <ul style="list-style-type: none"> <li>All invitees will attend.</li> <li>Approximately 70% of attendees will seek services from ABC</li> <li>Restaurant can accommodate needs</li> <li>IT and AV support are internally available</li> </ul> Constraints: <ul style="list-style-type: none"> <li>Budget \$14,000</li> <li>Abide by legal and regulatory guidelines</li> <li>June 30th, 2023 has been set for the event</li> <li>Restaurant must support attendee numbers and parking requirements</li> </ul>
Proposed Solution(s)	<ul style="list-style-type: none"> <li>Plan the event</li> <li>Execute the event</li> <li>Perform follow up actions</li> </ul>
Project Priorities	1. Schedule: Cannot deviate from the 30th of June 2023 2. Budget: \$14,000 3. Scope: Semi-flexible. Create the best possible environment for the investors
Return on Investment (ROI)	Cost: \$14,000  Revenue: 22 x \$12,000 = \$264,000
Risks (Potential)	<ul style="list-style-type: none"> <li>Attendees do not show up - Reduction in revenue opportunities</li> <li>Restaurant issues - Investors not happy with the food or environment</li> <li>Parking shortage - Customers arrive late and are frustrated</li> <li>Cost overruns - Reduced Return on Investment (ROI)</li> </ul>

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	<ul style="list-style-type: none"><li>• AV or IT issues - Presentation effectiveness reduced</li></ul>
Resources Required	<ul style="list-style-type: none"><li>• Core project team members</li><li>• IT and AV support</li><li>• Event speakers</li><li>• Finance manager</li><li>• Vendor manager</li><li>• Contracting</li></ul>