

## Activity Overview

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Earlier in this course, you examined a sample charter for the Plant Pals project as a whole. For this exercise, you will create a new charter for an upcoming stage of the Plant Pals project. Be aware that most projects have a single charter to set expectations and keep stakeholders aligned. However, creating your own charter for the next stage of the project will give you a chance to practice what you've learned.

In this activity, you will fill out a partially-completed project charter. 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 align stakeholders.

After you submit your work, review and respond to at least two of your classmates' assignments.

Note: this peer-reviewed practice activity will not count toward your grade for this course.

## Scenario

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

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As the Plant Pals project manager, one of your responsibilities is building an Operations and Training plan for the new service. The creation and implementation of this plan marks a new stage of the Plant Pals project with its own set of goals and deliverables. Its main goal is to create sustainable fulfillment and delivery practices for the service's day-to-day operations.

Putting these processes in place is essential to making a launch of this size successful.

To meet this goal, your team will create internal processes and training procedures for support teams, so they can meet the demands of the Plant Pals service. These processes will help mitigate potential revenue losses due to late shipments and cancellations by ensuring an efficient, high-quality customer experience. By ensuring that Plant Pals runs smoothly, the plan also supports the larger project goal of a 5% revenue increase for Office Green.

You estimate that it will take six months to fully implement all protocols, including setting up operational tools, putting delivery processes in place, and training employees. The Operations and Training plan should stay within a budget of \$75,000.

Some of the milestones your team must reach to complete this project include:

- Create a plant delivery and logistics plan to make the fulfillment process as efficient as possible. Your target is to deliver 95% of orders on time within one month of launch. Tasks include purchasing delivery trucks, hiring drivers, and calculating delivery fees.
- Set up order processing and supply chain management software to make revenue streams more efficient. Your team must select, install, and maintain the software to ensure it continues to function properly. If it does, all orders should be packaged and ready for shipment within two business days of being placed.
- Maintain excellent service standards by developing and launching an employee training program. You want to train 90% of employees before the official service launch. To reach

this milestone, your team needs to create a communications plan, prepare training lessons, and schedule and conduct training sessions.

Your first step is to create a charter to align your stakeholders and map out what your team needs to know to create and implement the plan.

## Step-By-Step Assignment 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](#)

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: Write an executive summary

Under Executive Summary, write 1-3 sentences outlining the project's purpose and desired outcomes.

For example, if you were writing an executive summary for the Plant Pals project as a whole, it might say:

“Our plan is to create a service that offers high-volume customers small, low-maintenance plants that can thrive in an office environment.”

Your summary for the Operations and Training plan charter should follow a similar format.

Step 3: Fill in the project goal

In the Project Goal section of the charter, record the main project goal of the Operations and Training plan. This goal should be more detailed and specific than your executive summary. Use the information from the scenario to make the goal SMART (Specific, Measurable, Attainable, Relevant, Time-bound).

For example, one of the SMART goals for the overall Plant Pals project is:

“Increase revenue by 5% by the end of the year by rolling out a new service that provides office plants to top clients.”

Note: Most projects have multiple goals, but you only need one for this activity.

#### Step 4: Identify the project deliverables

In the Deliverables box, record three expected outcomes of the project. Remember, these deliverables can be tangible or intangible project results.

For instance, one tangible deliverable of the overall Plant Pals project is, “send 1,000 plants to 100 customers.” An intangible deliverable could be, “increased brand awareness.”

#### Step 5: Determine the business case for the project

In the Business Case/ Background section, explain the reason for the project and how it supports the company’s overall success. Making a business case also gives your team the necessary context for project tasks, so be sure to include any useful background information as well.

For example, the business case for the overall Plant Pals project might be, “This is a top requested service from our customers, and it will also improve customer satisfaction and retention.”

#### Step 6: Fill in the benefits and cost areas (optional)

The Benefits, Costs, and Budget section already includes three benefits of the project, three cost areas, and the budget amount. If you would like, you can fill in any additional benefits or cost areas from the scenario. This section of the charter is optional and will not be graded.

For benefits, describe what Office Green hopes to get out of the project. This can include direct financial benefits (e.g., sales revenue), as well as indirect benefits (e.g., increased customer trust). Remember that the benefits should support your business case.

For costs, think about how the completing project could impact the company. Consider time and resources in addition to any financial impact.

- Note: You don’t need to assign monetary values to these cost areas in this exercise. You will break down the costs of the Plant Pals Operations and Training Plan project in detail in the next course, [Project Planning: Putting It All Together.](#))

#### Step 7: Define the project scope (optional)

The Scope and Exclusion section already contains three areas that are in-scope and two that are out-of-scope for the project. If you want to further define the scope, you can fill in additional in-scope and out-of-scope items. This section of the charter is optional and will not be graded.

Note: The charter should also list the members of your project team. This section has been filled out for you.

#### Step 8: Determine how to measure success

In the Measuring Success section, list two examples of success criteria that can help you determine when the project has reached its goal. You can use criteria from the scenario or determine other ways to measure project success. Remember that success criteria should be specific and measurable.

For instance, success criteria for Plant Pals as a whole could include “a 5% increase in revenue by the end of the year” or “a 5% increase in customer satisfaction (from 90% to 95%) three months after launch.” Both of these criteria include metrics that make it easy to tell when the project has reached its goals.