**Project Brief Template**

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**Project Brief**

**<Project Name>**

**Company Name**

**Street Address**

**City, State Zip Code**

**Date**

**Project Brief**

A project brief is a one-page, high-level overview of a project. The project brief varies according to the needs of the organization but includes elements such as the project objectives, scope, timeline, deliverables, target audience, and success criteria.

Essentially, it is an outline of the project that serves as a quick reference and guiding light for the team and other stakeholders. It should be specific enough to convey important points and yet concise enough to be considered “brief.”

|  |  |  |  |
| --- | --- | --- | --- |
| PROJECT NAME | Jones Accounting Customer Tax Document Portal | | |
| PROJECT MANAGER | Jane Rogers  Software Solutions | EMAIL | jrogers@softwaresolutions.com |
| START DATE  END DATE | 11/15/20xx  10/15/20xx | BUDGET | $xxxxxx.xx |
| PROJECT OVERVIEW | Jones Accounting needs a document portal to ease the tax processing burden of their clients in the small and medium business category. The portal will allow clients to upload documents directly to their secure account as time allows, knowing that a professional staff member will process the documents and keep their tax payments on track. It also provides a safe place to store past tax returns and documentation that can be accessed by the client at any time. | | |
| OBJECTIVES | * Create a user-friendly website for clients to upload documents to Jones Accounting. * Assure adequate cloud storage. * Integrate the Jones Accounting firm website with IRS and related local tax entities. | | |
| SCOPE | Create a website portal with secure and sufficient cloud storage to handle new demand. | | |
| DELIVERABLES | User Interface Design  Working Website  Training Class and Manual  Test and Acceptance Document | | |
| SUCCESS CRITERIA | 75% Client Uptake by 3/1/xx | | |
| TARGET AUDIENCE | **Small and Medium Businesses**  Small and medium business owners often wear many hats. Without a full-time accountant on staff, they worry about meeting tax deadlines and paperwork. Handing off this burden will give them peace of mind and free up valuable time. Learning to work with a new system may be more easily adopted if it starts at the beginning of a new tax year. | | |

**Sponsor Acceptance**

Approved by the Project Sponsor:

Date:

<Project Sponsor Name>

### <Project Sponsor Title>

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