Project Charter

Section	Detail
Project Name	Monthly Reporting Standardization (MRS) Initiative
Sponsor	David Chen (CEO)
Project Manager / Lead Analyst	Syahraini
Date	December 15, 2025
Status	Approved, Initiation Phase

1. Problem Statement

The current cross-functional monthly reporting process is unstructured, leading to chronic delays and inconsistent data. The lack of a single, agreed-upon data hand-off procedure causes interdepartmental conflicts, hinders management's ability to trust the data, and delays critical strategic decision-making.

2. Project Goal

To implement a standardized, repeatable, and error-proof workflow for data submission and consolidation that ensures executive-level reports are **complete and available by the 2nd of every month.**

3. High-Level Objectives

- **Assess Feasibility:** Conduct a short, focused technical assessment to determine if a low-cost system integration path exists to support the "Report by the 2nd" goal.

- **Map the Current State:** Document the *As-Is* monthly reporting process for Sales, Finance, and Operations using BPMN (Business Process Model and Notation).

- **Identify Root Causes:** Pinpoint the exact hand-off points and data transformation steps causing delays and inconsistencies.

- **Design the Future State:** Define a single, standardized *To-Be* process model with clear roles, responsibilities, and data formats.

- **Pilot & Implement:** Roll out the new process to the three key departments.

4. High-Level Project Scope

IN SCOPE	OUT OF SCOPE
Feasibility Assessment: Assessment of low-cost system integration methods.	**System Migration:** Full, large-scale implementation or replacement of major software systems (e.g., changing CRM or ERP).
Data Submission: The format, timing, and transfer mechanism for data from Sales and Operations.	**Report Presentation/Visuals:** Changes to the aesthetic design or template of the final report itself.
Data Consolidation: The steps Finance takes to combine raw data into the final report structure.	**Historical Data Clean-up:** Remediation or correction of past reporting data.

IN SCOPE	OUT OF SCOPE
Workflow Documentation: Creation of a BPMN model and standard operating procedure (SOP) documentation.	

5. Success Criteria

- **Timeliness:** Final report available by the 2nd of the month for three consecutive months.

- **Consistency:** Zero (0) discrepancies found in the final report that lead to a major revision.

- **Adoption:** All three departments (Sales, Finance, Ops) formally sign off on the new Standard Operating Procedure (SOP).

6. High-Level Stakeholders

Stakeholder	Role in Project
CEO, David Chen	Sponsor, Final Approver
Syahraini	Project Lead, Lead Analyst
Manager of Finance	Core Process Owner, Executor
VP of Sales & Manager of Operations	Key Data Contributors