Project Charter

1. General Information:

Project Title – The proper name used to identify this project; Project ID – The working name or acronym that will be used for the project; Sponsoring Organization – The organization sponsoring this project; Sponsor Representative – The name of the person representing the Sponsoring Organization; Prepared by – The person(s) preparing this document; Version – Version of this document.

Project Title:	CRM Migration Project - Longhorn Inc.	*Project ID:*	G9-Longhorn-CRM
Sponsoring Organization:	Longhorn Inc.	*Sponsor Representative:*	Mr. Bobby Carper
Prepared by:	Vijay Krishnan Kumar	*Version:*	1.0

2. Project Stakeholders:

List all applicable project stakeholders.

Position	Title/Name/Organization	Phone	E-mail
Sponsor Representative	Head of IT Mr. Bobby Carper Longhorn Inc	(979)-123 4567	bobbycarper@longhorninc.com
Project Manager- General	General Manager - IT Vijay Krishnan Kumar G9	(360)-207 9088	vijay_krishnan.k@gnine.com
Project Manager- Implementation	IT Implementation Head Alpha George G9	(979)-721 0815	alpha.george@gnine.com
Project Manager- Deployment	IT Deployment Head James Saby G9	(979) 739 4213	jamessaby@gnine.com
CRM User Representative	Donor tracking representative Corey Baker Longhorn Inc	(712) 123 6578	corey_baker@longhorninc.com

3. Executive Summary

Provide a brief overview of this project.

- Develop a new CRM system for Longhorn Inc., which will help them to increase the breadth of their services and expand their operations to new urban areas.
- Assist in the migration of their old CRM to the new CRM which provides them flexibility, customizability, efficiency and forecasting capabilities.
- Analyze the existing servers for their capability to support the new system and then decide whether the servers need to be replaced or upgraded.
- Total Budget of $100,000 for purchase or upgrade of infrastructure and the CRM implementation along with IT support.
- The project must be completed within 6 months.

4. Project Purpose

4.1. Business Need / Problem

The Business Need / Problem is an issue or opportunity pertaining to the business which needs to be resolved / acted upon. State in specific terms the issue or opportunity this project will address. Often, the Business Need / Problem is a critical business issue or initiative in the Sponsoring Organization's Strategic Plan.

- Longhorn Inc. want to develop the breadth of its services and expand operations to new urban areas.
- Their existing CRM system is outdated.
- Their existing servers are facing storage issues and are slow.
- The user interface of the current system is difficult to learn for the employees who are mostly part-time workers.
- These reasons disable them from efficiently managing donations, supporting funding campaigns, organizing volunteer assignments and tracking donation trends.

4.2. Business Objectives

Define the specific Business Objectives of the project that correlate to the strategic initiatives or issues identified in the Sponsoring Organization's Strategic Plan. Every Business Objective must relate to at least one strategic initiative or issue and every initiative or issue cited must relate to at least one project business objective.

Strategic Plan Element	Project Business Objectives
Determine whether to upgrade or purchase new servers	The server should have the capability to support the new system and future expansion scope.
Manage and track donations	New CRM system must have donation tracking capabilities
Expand the breadth of its operations to new urban areas	Real time analytics and forecasting capabilities in the new system. New system should also support web access and social media integration.
Provide employees with a easy to use system	Develop a user-friendly CRM system, supported with training material for employees to learn the system quickly.

5. Project Overview

5.1. *Project Description*

Describe the project focus, approach, customer(s), and the boundary limits of the project.

Initial focus is to analyze the capabilities of the existing server to support the new system and then to decide whether to upgrade or to replace them.

Develop a user-friendly CRM system which supports real-time analytics along with the enhanced features of the existing system. New system will support web access and social media integration.

Work with the stakeholders to identify the shortcomings of the existing system and the difficulties they face in using it.

5.2. *Scope*

The Project Scope addresses the who, what, where, when, and why of a project.

The scope includes upgrading or replacing the servers on which the new system will run on, developing a new CRM system which satisfies the specified requirements of the stakeholders. The scope also includes providing IT support for the system throughout its lifetime.
The new system needs to be implemented within 6 months from the start date ie; August 2017.

5.3. *Assumptions*

Assumptions are statements taken for granted or accepted as true without proof. Assumptions are made in the absence of fact. List and describe the assumptions made in the decision to charter this project.

Its assumed that:
- The project has executive support for this sensitive nature.
- There are backup servers to run other IT processes during the time of server upgrade/installation.
- The duration of the project will be 6 months. Project is scheduled to complete till its implementation phase within this time.
- After the completion of the project, the system will support the all the expansion plans of Longhorn Inc. in near future. Size of expansion is already fixed and will not be changed.
- Fund will be disbursed without any delay as the project progress and it will be completed within the budget limit of $1,00,000. A large fraction of the budget will be allotted while purchasing new hardware.
- Project team will provide IT support for the system after its implementation for a period of 6 months.
- All the milestone phases of Software Development Life Cycle will be completed as per the schedule.
- Study materials will be made available to the team as per the schedule for training the employees.
- All the accounts which are going to be created will have industry standards of security and it will be less vulnerable.

5.4. Constraints

Constraints are boundary conditions that the project must stay within. List and describe the constraints applicable to this project.

- Budget constraint of $100,000.
- Time constraint of 6 months.
- The new system must perform without any latency.
- The new system must be having all the specified requirements.
- We have limited resource of 3 members in the project team. There is no backup plan in case of emergency.
- Project budget of $100,000 is very limited considering that hardware upgradation also has to be done.
- We have plans to purchase license for Real time analytics tools for which the prices are subjected to change. It will be a serious constraint if it is rises beyond the estimate.
- Flow of donations for the project should be uninterrupted so that it reaches at least the current budget.
- If we cannot get same hardware that we have decided as of now, it can seriously impact the performance of the new system.

6. Project Requirements / Deliverables

The Project Requirements / Deliverables define what the project must accomplish, including the customer/ user requirements and products / services to be provided by the project.

- Upgrade or replace the existing servers after analyzing their capability to support the new system.
- The new system must enable them to track donations, follow up with the donors, support funding campaigns, perform real time analytics, perform forecasting and organize volunteer assignments.
- The new system must also include web access capabilities and reporting abilities.
- The new system must to be customizable and want social media integration with Facebook and Twitter.
- Provide online training material for their employees to learn the new system.
- Provide IT support to the new CRM system.

7. Project Management Milestones and Deliverables

Provide a list of Project Management Milestones and Deliverables. This list of deliverables is not the same as the products and services provided by the project, but is specific to the management of the project. An example of a Project Management Milestone is the Project Plan Completed.

Milestone / Deliverable	Estimated Date	Responsible Individual
Requirement Analysis and System Requirement Specification	02/25/2017	Alpha George, Vijay Krishnan Kumar

Analyze and decide whether to upgrade/replace servers	03/15/2017	Alpha George, James Saby
Upgrade/Replace servers	03/30/2017	IT team, Vijay Krishnan Kumar
High Level Architecture design	04/20/2017	Alpha George, James Saby
Modules Implementation and Unit Testing System and Integration Testing Deployment in production Environment Provide training materials and IT support	[July-August]	Vijay Krishnan Kumar, Alpha George, James Saby

8. Personnel & Other Resources

Identify the personnel and other resources required by the project and/or committed to this project by the project sponsor. Additional resources may be committed upon completion of the detailed project plan.

| Resources	Description
Project Team	• Alpha George • James Saby • Vijay Krishnan Kumar • Representatives from the system users • IT team representatives from Longhorn Inc.
Support	Longhorn IT team support, server installation team support
Facilities	Office space for minimum of three
Equipment	Workstations, Servers
Software Tools	Server capability analyzing software tools

9. Project Risks

Risks are statements of issues or problems that have the potential to arise but have not yet occurred. List and describe the initial risks for this project.

- Existing servers crashing before upgrade/replacement.
- New servers not sufficient to support the new system and future demand.
- Disagreement on proposed UI concepts for the new system.
- Disagreements about requirements documentation.
- Disagreements about cost estimation.
- System objectives change over the span of system development.
- Actual cost of the system exceeds the fixed budget of $100,000.
- Implementation of the system exceeds the stated deadline.
- The new system does not effectively meet the purpose of the project.

10. Project Organization

10.1. Project Organization Chart

Provide a graphic depiction of the project's organizational structure. The project's hierarchal diagram begins with the project sponsor and includes all project stakeholders.
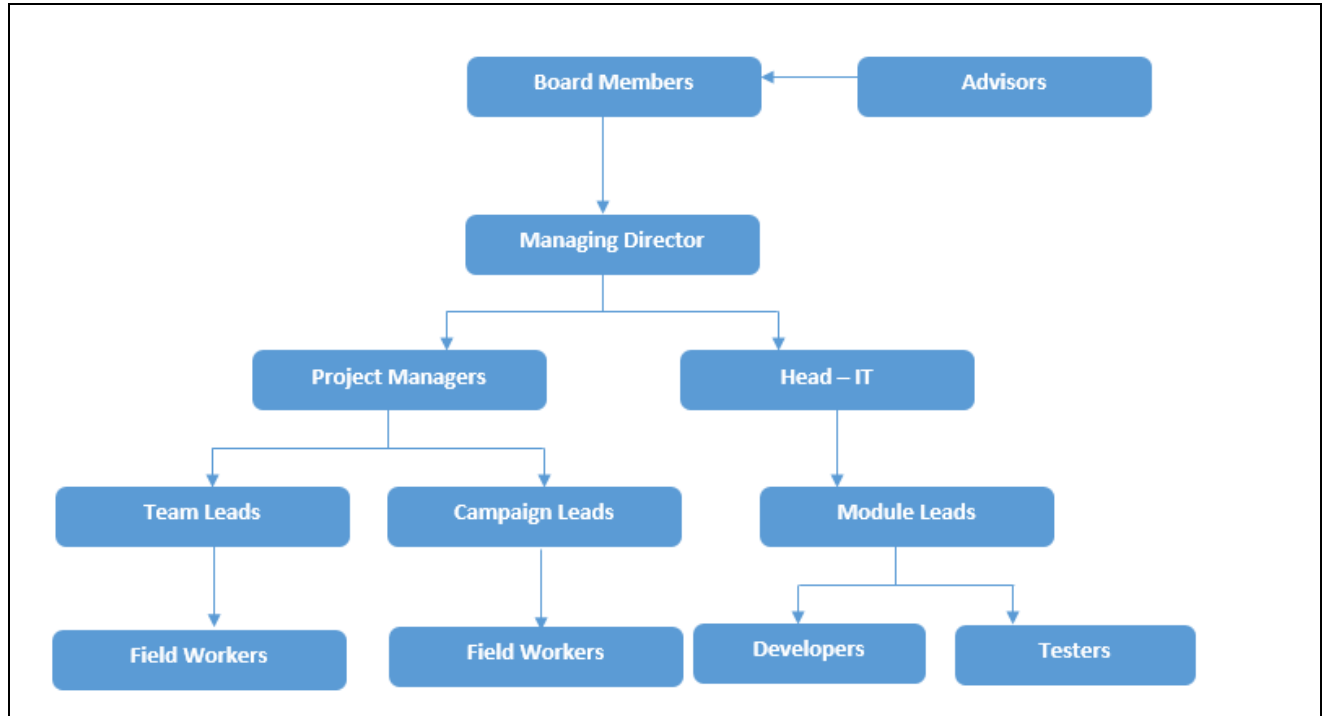
10.2. Roles & Responsibilities

Describe the Roles and Responsibilities of all project stakeholders identified for this project.

Stakeholder Title	Name	Roles & Responsibilities
Sponsor Representative	Mr. Bobby Carper	Champions the project, mitigates high level issues and competing projects, provides financial backing for project
Project Manager-General	Vijay Krishnan Kumar	Allocates resources, resolves issues, coordinates project resources and project activities, manages project risks, elevates issues to sponsor
Project Manager-Implementation	Alpha George	Allocates resources for project implementation, manages implementation risks, elevates implementation issues to the sponsor representative
Project Manager-Deployment	James Saby	Allocates resources for project deployment, manages deployment risks, elevates deployment issues to the sponsor representative

CRM User Representative/ Faculty Representative	Corey Baker	Liaison between project team and faculty to provide input and feedback
Longhorn IT helpdesk	Bingo	Helps in resolving the generic IT problems within Longhorn Inc. during the duration of the project

11. Approval Signatures

The Signatures of the people below document acceptance and approval of the formal Project Charter. The Sponsor Representative must have the authority to commit the organization's resources to the project. The Project Manager is empowered by this charter to proceed with the project as outlined in the charter.

Position/Title	*Signature/Printed Name/Title*	*Date*
Sponsor Representative		
Project Manager		