**Project Charter - Template**

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**Note: This is a template. Organizations can use it customized to their need. It can be used as a generic approach to document charter. It captures the basic needs and is documented with reference to waterfall methodology. The examples quoted here are generic and are based on author’s experience. Users of this document should not copy this verbatim.**

**A project charter is a document which the Project Manager and the entire project team refers during the life cycle of the project. The charter comprises of the business objective and overview. It sets the context for the needs of the project and the goals. The requirements, risks and assumptions are all documented here.**

 **The estimation, schedule, roles and responsibilities are also baselined in the document. A charter must be signed off by the key stakeholders before proceeding to each phase.**

REVISION HISTORY

[This section is to provide information as how the version of the charter has been controlled by its author/authors. It will indicate who were the authors who made the changes, when was it made, why was it made and who approved it]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Version #** | **Implemented****By** | **Revision****Date** | **Approved****By** | **Approval****Date** | **Reason** |
| 1.0 | *<Author name>* | *<mm/dd/yy>* | *<name>* | *<mm/dd/yy>* | *<reason>* |
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# Introduction

## Purpose of Project Charter

*The <Project Name> project charter will include the overview of the project, needs, scope, objective and goals of the project. The intended audience of the* *<Project Name> project charter is the project sponsor and all the stakeholders. The scheduled will be updated and tracked through the charter. A charter must be signed off by the business sponsor/his or her designated representatives. A charter sign off is a must as the project proceeds from one phase to the other. The roles and responsibilities of the key stakeholders must be documented in the project charter. All key risk items must be documented here. The high level design must be updated in the charter during the design phase. The timelines and estimates need to be update here.*

# project /Product Overview

*This section will document the high level overview of the project. This section will define the scope of project at a high level and the need of implementing the product or solution in a specific market. It will also detail how this project would benefit and who would be the audience who will be benefitted by this project. The business benefit of the project or the ROI and market analysis can be included in this section.*

# JUSTIFICATION OF THE PROJECT

## Business Need

*What is the need of this project? How will it impact people? Competitor research on similar products or services should be included here. The business benefit can be included in this section. For e.g. if call handling time for “credit” is reduced by 15%, then customer satisfaction will increase by 9% and profit will increase by 13% for the business unit.*

## SCOPE & OBJECTIVES

*Detail the in-scope and out of scope items for the projects. Outline the high level objectives. What does the sponsor wants to achieve through this project. (E.g. The sponsor wants to reduce the call handling time by 15% is the objective and it will be in scope for “credit” business unit)*

## GOALS & Strategic Alignment

|  |  |  |
| --- | --- | --- |
| ***GOAL NO*** | ***GOAL DETAILS*** | ***STRATEGIC (Y/N)*** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# REQUIREMENTS

## High-Level Requirements

*The following table presents the requireme**nts that the project’s product, service or result must meet in order for the project objectives to be satisfied. The requirements should translate from the goals.*

| ***REQ #*** | ***REQUIREMENT DESCRIPTION*** |
| --- | --- |
|  |  |
|  |  |

# EstimatION AND SCHEDULE

 *This section will include the overall estimate provided by the impacted teams. It will also detail the phase end dates for the project. The dates should align with those provided in the project plan. The project manager should own the dates and indication of slippage of any dates should be highlighted the stakeholders in the form of risk/issues.*

## EsTIMATION

|  |  |  |
| --- | --- | --- |
| ***TEAM NAME*** | ***HIGH LEVEL SIZING*** | ***POST ANALYSIS/FINAL SIZING*** |
| ***TEAM A*** |  |  |
| ***TEAM B*** |  |  |
| ***TEAM C*** |  |  |
| ***TOTAL*** |  |  |

## SCHEDULE

 *For FP (Fixed price project), milestone dates can also be included in this section .his should be updated during end of analysis and design*

|  |  |  |
| --- | --- | --- |
| ***PHASE NAME*** | ***START DATE*** | ***END DATE*** |
| ***ANALYSIS*** |  |  |
| ***DESIGN*** |  |  |
| ***CODING*** |  |  |
| ***TESTING*** |  |  |
| ***IMPLEMENTATION*** |  |  |

# Assumptions AND Risks

## Assumptions

*The charter is created based on assumptions. E.g. the integration testing would complete by mm//dd/yy, if the hardware vendor completes the network & cabling by mm’/dd’/yy’. The project team must be proactive and detailed to underline all the assumptions that has been taken into consideration while estimating the project and providing timelines*

## Risks

The project sponsor should be aware of the key risks associated with the project from inception. The existing risks will guide the sponsor to take decisions on funding and give a go/no-go. It also highlights the details which all the stakeholders need to be aware of and take appropriate actions.

| ***RISK*** | ***IMPACT*** | ***COMPLEXITY*** | ***OWNER*** | ***MITIGATION PLAN*** |
| --- | --- | --- | --- | --- |
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|  |  |  |  |  |

# key stakeholders

## StaKEHOLDER NAMES AND DESIGNATIONS

|  |  |  |  |
| --- | --- | --- | --- |
| ***NAME*** | ***DESIGNATION*** | ***DEPARTMENT*** | ***SIGNATORY ON DOCUMENTS ( Y/N)*** |
|  |  |  |  |
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## ROLES AND RESPONSIBILITIES OF THE STAKEHOLDERS

*This section details the roles & responsibilities of every stakeholder of the project so that they are aware of their responsibilities. (Sample Included)*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***NAME*** | ***DESIGNATION*** | ***DEPARTMENT*** | ***SPONSOR*** | ***INVOLVEMENT IN ANALYSIS*** | ***ARCHITECTURAL RESPONSIBILITY*** | ***HARDWARE SUPPORT***  | ***TO PROVIDE USER ACCEPTANCE SIGN OFF*** |
| ***X*** | ***Y*** | ***Z*** | ***Y*** | ***N*** | ***N*** | ***N*** | ***N*** |
| ***A*** | ***B*** | ***C*** | ***N*** | ***Y*** | ***Y*** | ***N*** | ***N*** |

# HIGH LEVEL ARCHITECTURE

*This section will include the high level architecture of the product/services. It should include the impacted systems at a high level. Any details of the architecture can be added in the appendix.*

# project Charter approval

*This section will include the signatures of the key stakeholders. The signature if provided through email, can be stored in a document repository, the link to which can be included in this section. (Sample Included)*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***NAME*** | ***DESIGNATION*** | ***DEPARTMENT*** | ***DATE***  | ***SIGNATURE*** |
|  |  |  |  |  |
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# APPENDIX A:

*REFERENCE ARCHITECTURE (If applicable for the project)*

# APPENDIX B:

*This section will refer to the acronyms that have been used in this document.*