

# Project Charter

## 1. Project Overview

|                 |                                      |
|-----------------|--------------------------------------|
| Project name    | {{Project name}}                     |
| Sponsor         | {{Sponsor / decision-maker}}         |
| Project manager | {{Project manager}}                  |
| Start date      | {{Start date}}                       |
| Target end date | {{Target end date}}                  |
| Status          | {{Not started / On track / At risk}} |

Keep this block on page one so anyone can see the project, its owner, and where it stands at a glance. Name one accountable project manager and one sponsor who can unblock decisions.

## 2. Objectives & Success Criteria

- {{Business case — the problem or opportunity that justifies funding this project}}
- {{Primary objective — a measurable result with a target and a date}}
- {{Success criterion #1 — the number the sponsor will judge this project by}}
- {{Success criterion #2 — a second measurable outcome}}
- {{Key assumption the plan depends on (budget approved, team available, system access granted)}}

Write objectives you can measure — “launch the new checkout by Q3 with under 1% error rate”, not “improve checkout”. If you cannot tell whether it is done, rewrite it.

## 3. Scope

### In scope

- {{Deliverable or capability this project will produce}}
- {{Teams, departments, or locations included}}
- {{Systems or processes that will change}}
- {{Phase or release boundary — what "version 1" covers}}

### Out of scope

- {{Work explicitly excluded — name what stakeholders will assume is included}}
- {{A later phase deferred out of this charter}}
- {{Adjacent system or team that is NOT part of this effort}}

*Naming what is out of scope is what actually prevents scope creep. Be explicit about the work people will assume is included but is not.*

#### 4. Milestones & Timeline

| Milestone   | Owner | Target date     | Status      |
|---|-------|-----------------|-------------|
| {{Charter{{Sponsor}} approved & funded}}          |       | {{Target date}} | Not started |
| {{Discover{{Owner}} / requirements complete}}     |       | {{Target date}} | Not started |
| {{Design {{Owner}} / solution approved}}          |       | {{Target date}} | Not started |
| {{Build {{Owner}} & test complete}}               |       | {{Target date}} | Not started |
| {{Go-live{{Owner}}}}                              |       | {{Target date}} | Not started |
| {{Handov{{Owner}} to operations & project close}} |       | {{Target date}} | Not started |

*Milestones are checkpoints, not tasks — a handful of dates that prove the project is moving. Each should be a clear “done / not done”, with one owner.*

#### 5. Tasks & Work Breakdown

| Task  | Owner    | Start     | Due     | Status      |
|---|----------|-----------|---------|-------------|
| {{High-level workstream — e.g. "Discovery & requirements"}} | {{Lead}} | {{Start}} | {{Due}} | Not started |

|   |          |           |         |             |
|---|----------|-----------|---------|-------------|
| {{High-level<br>workstream — e.g.<br>"Build &<br>configuration"}} | {{Lead}} | {{Start}} | {{Due}} | Not started |
| {{High-level<br>workstream — e.g.<br>"Rollout &<br>training"}}    | {{Lead}} | {{Start}} | {{Due}} | Not started |

Break the work into tasks small enough to track in a week or less. Give each an owner and a due date; a task with no owner will not happen.

## 6. Roles & Responsibilities

| Role                                  | Name      | Responsibility   |
|---------------------------------------|-----------|--|
| Sponsor                               | {{Name}}  | Owns the business case and budget; the final decision-maker      |
| Project manager                       | {{Name}}  | Runs the project day-to-day and reports status to the sponsor    |
| {{Business owner / role}}             | {{Name}}  | Represents the users; signs off that the solution meets the need |
| {{Technical lead / role}}             | {{Name}}  | Owns the technical design and delivery                           |
| {{Steering committee / stakeholders}} | {{Names}} | Reviews progress at milestones and resolves cross-team conflicts |

Assign responsibilities to roles so the plan survives a team change. Be clear who decides, who does the work, and who needs to be kept informed.

## 7. Risks & Mitigation

| Risk  | Impact               | Likelihood           | Mitigation                         | Owner     |
|---|----------------------|----------------------|------------------------------------|-----------|
| {{The risk most likely to undermine the business case}} | {{High / Med / Low}} | {{High / Med / Low}} | {{The mitigation and who owns it}} | {{Owner}} |

|   |                      |                      |                |           |
|---|----------------------|----------------------|----------------|-----------|
| {{An adoption / change-management risk}}    | {{High / Med / Low}} | {{High / Med / Low}} | {{Mitigation}} | {{Owner}} |
| {{A resourcing or vendor risk}}             | {{High / Med / Low}} | {{High / Med / Low}} | {{Mitigation}} | {{Owner}} |
| {{A data, integration, or compliance risk}} | {{High / Med / Low}} | {{High / Med / Low}} | {{Mitigation}} | {{Owner}} |

List the few risks that would actually derail the project, rate impact and likelihood (High/Med/Low), and name the action and the owner. Review this table at every status check.

### 8. Budget

| Item                                 | Estimate     | Actual     |
|--------------------------------------|--------------|------------|
| {{Software / licenses}}              | {{Estimate}} | {{Actual}} |
| {{Implementation / vendor services}} | {{Estimate}} | {{Actual}} |
| {{Internal effort / backfill}}       | {{Estimate}} | {{Actual}} |
| Contingency                          | {{Estimate}} | {{Actual}} |

Estimate the main cost lines and add a contingency for the unknowns. If your project has no budget, keep the section and write “N/A” — reviewers expect to see it.

### 9. Approval

|   |   |
|---|---|
| Project Manager<br>Name: _____<br>Signature: _____<br>Date: _____ | Sponsor<br>Name: _____<br>Signature: _____<br>Date: _____ |
|---|---|

Both sign-offs confirm the plan, scope, and budget are agreed before work starts.