

Enter Project Name Here

Enter Department Name

OE-PM Project Charter Document

Status: *(Draft or Published)*

Version: *(0.# or 1.#)*

Prepared by:

Date Created:

Date Last Revised:

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Document Revision History

| Version # | Date | Requestor | Revised By | Change Description |
|-----------|------|-----------|------------|--------------------|
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Note:

Standardized version numbering convention:

Drafts – (Before approval signature)

0.#

0.#+1

0.#+2

Published – (Once there is an approval on the document)

1.0

1.#

1.#+1

Document Change Management and Distribution Procedures

Changes will be applied to this document according to the following procedure:

1. Direct all change requests to the author of this document.
2. Each change request will be considered. If accepted, the change will be incorporated into a new draft of this document.
3. The new draft of this document will be circulated for review by appropriate project resources.
4. Approval of the new draft will be by concurrence of those individuals participating in the review.
5. Once concurrence is achieved, the draft becomes the new version of this document, replacing any existing and previous versions.
6. New versions of this document are to be distributed to appropriate project resources or made accessible on-line for reference. Notification of a new version will be communicated.

Glossary of Terms

| Term/Acronym | Definition |
|--------------|------------|
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Document Information

Purpose:

A Project Charter helps bring focus to the real problem to be solved, establishes initial criteria for project success, provides an initial project scope, identifies core business needs instead of jumping to ultimate solutions, and can provide quantifiable business information to support initial ballpark sizing efforts.

Audience:

- All project team members
- Project Sponsor, Business Owner, and IT/Technical Owner
- All other key stakeholders

Criteria for Use:

- Small, Medium and Large projects per Sizing Matrix

Timing:

- Project Charter is completed at the beginning of Planning
- Completed before the Project Management Plan

Naming Convention:

Project Charter should be saved with the following naming convention: Project Charter_ProjectName_Author Initials_Month_Day_Year (e.g. Project Charter_Wealth Management Strategy_LL_1_21_11).

Delete all italic sections before completing the document. These are only for use by the person(s) completing the document.

Project Information

| | | | |
|----------------------------|--|------------------------|-----------------------------------|
| Project Manager | <i>Overall project manager</i> | Project Sponsor | <i>Overall responsible person</i> |
| Business Owner | <i>Escalation point in business</i> | IT Owner | <i>Escalation point in IT</i> |
| Project Description | <i>Short description of the project (i.e. What is project about? Why is the project being done? What are the high level goals of the project?)</i> | | |

Project Scope

Business Purpose, Objectives and Goals:

Briefly describe the current business environment, including structure, capability, domain and process, as well as specific goals driving the need for this project. Objectives are statements that describe what this project will achieve and deliver. Objectives should be "SMART": Specific, Measurable, Achievable, Realistic, and Time-Based. To be specific and concrete, objectives should be deliverable-based. The completion of an objective should be evident through the creation of one or more deliverables. If the statement is at a high level and does not imply the creation of a deliverable, it may be a goal instead. If the statement is too low-level and describes features and functions, then it may be a requirement statement instead.

Problem/Opportunity Statement:

Provide a statement summarizing the problem to be solved or opportunity being addressed by this project.

| | |
|------------------------------------|--|
| The problem of | |
| affects | |
| The impact of which is | |
| A successful solution would | |

Constraints

Inclusions:

Provide a high level summary of what is to be included (in scope) for project completion.

Exclusions:

Provide a high level summary of what is to be excluded (out of scope) for project completion.

Key Assumptions:

Provide a high level summary of known assumptions about the project. Assumptions are factors that, for planning purposes, are considered to be true, real, or certain without proof or demonstration.

Project Dependencies:

Provide a high level summary of any known project dependencies.

Key Risks and Key Issues:

Provide a high level summary of any known project risks. A risk is an uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives An issue is an event or circumstance that has occurred with project impact and needs to be managed and resolved.

Critical Success Factors

CSFs are measurable, qualitative criteria, listed in order of importance, that when present in the project's environment are most conducive to the achievement of a successful project. Often a business sponsor's acceptance criteria will drive the CSFs for the project. The nature of these factors will govern the response to conflicts, risks, and setting of priorities. CSFs are highly dependent on the type of complexity of the project at hand. Examples include: Project implemented on time and within budget; Service Level Agreements are met; interfaces between ABC and XYZ work per specifications; ABC reports are produced as required; all service codes are verified during ABC process according to systems design; Phone Bank reps have been properly trained; Business Continuity Planning designed into the platforms; etc. Key Success Indicators are quantitative criteria by which success will be measured in some way, at some time, on some scale.

| Critical Success Factor | Key Success Indicator | Action Steps to Assure Success |
|-------------------------|-----------------------|--------------------------------|
| | | |
| | | |
| | | |

Stakeholder and User Description

Key Stakeholder Descriptions:

There are a number of key stakeholders(e.g. Business, IT, FIS) with an interest in the project that are not end users. Present a summary list of these stakeholders, function represented, and what responsibility they own regarding the project.

| Key Stakeholder | Function Represented | Responsibilities |
|-----------------|----------------------|------------------|
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User Summary:

Identify all end-user types, how they will be impacted by the new or modified product, service or system, and which stakeholder represents their interest. This includes all internal and external customers and businesses impacts

| End User Types | Impact Description | Stakeholder |
|----------------|--------------------|-------------|
| | | |
| | | |
| | | |

Features

List and briefly describe the desired features of the product, service or system to be implemented by the project. Features are the high level capabilities that are necessary to deliver the desired benefits to the end users. For example, a feature of a problem tracking system might be the ability to provide trend reports. Features of a new brochure might be that it be full color and pocket sized. Features of a customer account maintenance function might be that it is interactive and real time or that it maintains a log of changes made to certain data.

Because the Project Charter Document is typically reviewed by a wide variety of involved stakeholders, the level of detail needs to be general enough for everyone to understand. However, enough detail must be available to provide them with the information they need to develop a successful solution.

Throughout this section, each feature will be externally perceivable by users, operators, or other external systems. These features need to include a description of functionality and any relevant usability issues that must be addressed. Avoid design concepts; keep feature descriptions at a general level. Focus on capabilities needed and why (not how) they should be implemented.

| # | Feature | Functionality or Usability Concerns |
|-----|---|--|
| n.n | The system shall allow customers to transfer money between their existing accounts. | Need to determine which accounts should be presented for transfer. |
| | | |
| | | |
| | | |

Approvals

Documented Project Charter approvals are required from designated approvers.

| Role/Name | Approval Date |
|----------------------------------|---------------|
| Project Sponsor: | |
| Business Owner: | |
| Technology Owner, if applicable: | |