

Project Description

To Be Completed by the Sponsor

Overview:

Sentences about:

- Is this project part of a larger strategic initiative? If so, what initiative?
- Why is this project necessary?
- Why do you want to undertake this project?
- What customers want/need this?
- What are the business drivers?
- What are the measurable benefits of this project? (estimated additional revenue/cost savings, any competitive advantages to be gained)?
- What current problems are you hoping to address?
- What's the priority of this project?

Background:

What led to this initiative/project? How did this project come to be needed?

Project Objectives:

This is the place for high level information. Describe the specific business and/or innovation objectives planned for this project. The outcome you wish to achieve.

- What is the outcome you wish to create?
- What's the value in accomplishing it?
- What are the implications of not undertaking this project?
- How will this affect the company's operations going forward?

Customers:

Who are the customers you are addressing with this project? What are the expectations of those customers the project is targeting? How does this project represent those expectations and interests of the customers?

Customer 1 (type and concern or need)

Customer 2

Customer 3

Customer 4

Stakeholders:

Internal Stakeholders:

#1

#2

#3

#4

External Stakeholders:

#1

#2

#3

#4

To Be Completed by the Project Manager Assigned

Business Case:

Using CaseComplete or similar software, describe the business users and use case(s) involved in this project.

Project Scope:

Define the scope of this project in its entirety. List what's in the scope and out of the scope.

In scope:

Out of scope:

Key Deliverables:

Define the key deliverables for this project. The project cannot be considered complete until all these items have been delivered. This list is somewhat flexible, can be renegotiated as required with customers and all other involved parties who have approved this charter.

Sites:

List the sites that will be affected in this project (locations) and how they will be affected.

Related Initiatives:

List projects currently proposed or in progress that are independent from this project. List other areas that may be affected by this project. Include contact names and official project names when referring to them. Give as much detail as possible when discussing the effects these related initiatives could have on your project.

Key Assumptions:

List assumptions about this project. What key assumptions have been made? State whether they are verified or unverified assumptions.

Verified:

Unverified:

Risks:

List risks associated with this project. Small, medium, larger risks.

State strategies for risk mitigation, prevention, and contingency.

Constraints:

List the constraints identified for this project.

Issues:

List the open issues. Unanswered questions. Differences in opinion.

Project Strategy:

State the strategy for accomplishing this project, including dates for Implementation, Launch, and Execution.

State what you will have to build for the project, what you will have to buy, etc.

Preliminary Size and Cost Estimate:

What is the estimated size and cost for this project?

Hours:

Duration of time:

\$ Cost:

Deadline:

What's the deadline for this project? What's the reasoning behind this deadline? Implications of not meeting this deadline? Are there trade-offs possible?

Shutdown Conditions:

What could develop that would necessitate this project needs to be shut down?

Revision History:

1. Date of change_____, Changes made_____, Changes made by _____
2. Follow above structure for recording revisions to the project.

Approvals:

Be sure to receive all necessary approvals. Compile list below of approvals.

Sample:

- John Smith, approved via [email, signature, phone, verbal], date _____