Guide to Create the Project Charter
– A Step by Step Approach –

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1 Define which part of a problem, opportunity, or regulation the project will address.

1. Analyze the Problem/Opportunity/Regulation

   1.1. Review the overall problem/opportunity/regulation faced by the organization.

   1.2. Assess the complexity and scope of the problem/opportunity/regulation to determine if it is too large for a single project.

2. Break Down the Problem/Opportunity/Regulation

   2.1. Identify the different causes (for problems), components or aspects of the problem/opportunity/regulation.

   - Addressing Causes of a Problem:
     - Identify Causes: Identify the root causes of the problem asking why questions
     - Analyze Causes: Analyze the causes to determine which ones are critical or feasible to address through the project.
     - Define Project Scope: Based on the analysis, determine which causes the project will/should/can address.

   - Seizing a Business Opportunity:
     - Identify Opportunity Segments: Identify various segments or facets of the business opportunity.
     - Analyze Opportunity Segments: Analyze the opportunity segments to determine which ones align best with the organization goals and strategies.
     - Define Project Scope: Based on the analysis, determine which opportunity segment(s) the project will/should/can target.

   - Addressing a Mandatory Regulation:
     - Identify Regulatory Requirements: Begin by identifying the specific regulatory requirements that your organization needs to comply with.
     - Analyze Mandatory Regulation: Analyze the regulatory requirements and segments to determine which ones are critical to address for compliance.
     - Define Project Scope: Based on the analysis, determine which regulatory requirements, and segments the project will/should/can target.

   2.2. Define Inclusions and Exclusions: Clearly specify what aspects, components, or causes are included in the project scope (Inclusions). Explicitly state what will not be addressed by the project (Exclusions). This is vital for setting clear boundaries and managing expectations.

   2.3. Ensure that the size of the causes/components/aspects of the problem/opportunity/regulation to be addressed by the project is aligned with the project manager's workload and available working hours of 2000 hours per

year if working full time on this project. Remember that a person working 2000 hours per year can manage a maximum of 10 people working full-time.

2.4. Use collaborative decision-making in this process: engage stakeholders and decision-makers, share the analysis and proposed project scope with relevant stakeholders, seek input, and gather feedback to ensure consensus on the dimensioning of the project.

3. Document the final version of this inclusions and exclusions document. This final version will serve as an input for the elaboration of the Problem, Purpose, and Goal Statements and for the Project Charter.

Example of a problem statement with some background information

Jordan Taylor, Corporate Manager at FreshMart Groceries, has been with FreshMart Groceries for over a decade, working their way up from store management to a corporate role. FreshMart is a well-established grocery chain with multiple physical stores.

Jordan has observed the shifting consumer trend towards online shopping. They've seen competitors gaining an edge with their online platforms and recognize both the opportunity and necessity for FreshMart to establish a strong digital presence. Jordan believes that FreshMart can offer a unique online grocery shopping experience, but also acknowledges the challenges, especially in terms of user experience and security.

Problem: Existing online grocery shopping platforms are not user-friendly and have security concerns, leading to lost sales and potential security breaches.

Causes: Poor design or lack of user feedback during development, making platforms not user-friendly. Also Outdated security protocols or lack of regular security audits, leading to security concerns.

Effects: Decreased user trust in online grocery shopping platforms. Lost sales due to user frustration and concerns about security. Potential increase in fraudulent activities or data breaches.

Inclusions: a) Development of a user-friendly interface for the mobile application. b) Implementation of robust security protocols to ensure safe transactions and user data protection.

Exclusions: Directly addressing product variety. However, by creating a platform that vendors trust and users love, we aim to indirectly attract a wider range of products.

Section 1 Evaluation Criteria:

1. Identification and Contextualization: Clarity in defining and providing context for the problem, opportunity, or regulation.

2. Complexity and Scope Analysis: Assessment of the issue's complexity and suitability for a single project scope.

3. Problem/Opportunity/Regulation Breakdown: Thorough breakdown into causes, components, or aspects.

4. Critical Analysis: Depth of analysis in identifying key causes or segments and logical reasoning for regulatory issues.

5. Scope Definition: Appropriateness and feasibility of the defined project scope.

6. Inclusions and Exclusions: Completeness of what aspects, components, or causes are included and not included in the project scope.

7. Documentation: Quality and precision of the final inclusions and exclusions document.

2 Identify and Analyze Project Stakeholders.

1. Define initial roles

    1.1. Project Board, including names and positions in the functional organization

    1.2. Sponsor (this is one person in the Project Board who speaks in name of the Board), name and position in the functional organization

    1.3. Project Manager, name and relation to the functional organization

    1.4. Customer organization, name and position of the person who speaks in name of the customer

    1.5. Organizations affected by the execution of the project, names, and representatives of those organizations

    1.6. If already visible: organizations affected by the delivery/conclusion/operation of the project product. If not yet visible, leave it blank.

2. Project Stakeholder Identification

    2.1. Gather all existing information about the upcoming project.

    2.2. Identify all project stakeholders, both internal and external, who have an interest or influence in the execution or in the results of the project.

    2.3. Recognize their respective roles. These may include the project customer, project sponsor, co-sponsor (if applicable), functional or line managers, project management office (PMO), team members, work package leaders. In cases where multiple sponsors are involved, a collective governance body should be established with a designated head.

    2.4. Create a stakeholder register document.

    2.5. Gather information for each stakeholder and document it in the stakeholder register: department, business unit, or company affiliation, position within the organization, initial project requirements, and expectations, contributions to the project and any other information that may serve the project.

3. Stakeholder Analysis, Classification and Prioritization

    3.1. Review the stakeholder register and your impressions from the sessions to gather stakeholder information.

    3.2. Understand the needs, expectations, concerns, as well as the respective level of influence, current interest, engagement, and awareness of each stakeholder or stakeholder group.

    3.3. Allocate stakeholders to one of the quadrants of the stakeholder's classification matrix. Stakeholders in Quadrants A, B and C are important and have an acceptable level of interest/engagement/awareness. Stakeholders in Quadrants H and I are important and need to be moved to the right via stakeholders engagement strategies to be developed. Stakeholders in Quadrant D may stay in

this Quadrant. Brainstorm about Stakeholders in Quadrantes E, F and G. Stakeholders in quadrant G are perfect for testing activities.

	(Interest + Engagement + Awareness) / 3		
Influence	**H**	**B**	**A**
	I	**D**	**C**
	E	**F**	**G**

2.4 Share the draft of classification with the project sponsor, gather feedback, make necessary adjustments, and repeat the process until the classification of stakeholders is approved by the sponsor. This is the basis for action plans for communications and stakeholder engagement.

4. Document the final version in the Stakeholders Register. This final version will serve as an input for the Project Charter.

initial roles

- Project Board: Jordan Taylor (Corporate Manager), Chris Adams (Chief Technology Officer), Emily Roberts (Chief Marketing Officer)

- Sponsor: Jordan Taylor (Corporate Manager)

- Project Manager: Yet to be appointed

- Customer organization: FreshMart Groceries, represented by Jordan Taylor

- Organizations affected by the execution of the project: FreshMart IT Decpartment, represented by Chris Adams + FreshMart Marketing Department, represented by Emily Roberts

- Organizations affected by the delivery/conclusion/operation of the project product: FreshMart Customer Service, representative yet to be identified

Stakeholder Register:

Stakeholder	Department	Role	Initial Requirements	Contributions
Jordan Taylor	Corporate Management	Sponsor	Secure and user-friendly platform	Decision-making, funding
Chris Adams	IT	CTO	Seamless integration, security	Technical expertise, resources
Emily Roberts	Marketing	CMO	Brand alignment, user engagement	Marketing strategies, user feedback

Stakeholder Analysis and Classification (1: low | 2: medium-low | 3: medium | 4: high | 5: very high)

Stakeholder	Importance	Level of combined Interest, Engagement, Awareness	Current Quadrant	Target Quadrant
Jordan Taylor	5	4	A	A
Chris Adams	4	2	H	A, at least B
Emily Roberts	4	5	A	A

Section 2 Evaluation Criteria:

1. **Initial Roles Definition:** Clarity in defining roles for Project Board, Sponsor, Project Manager, Customer organization, and other affected organizations.

2. **Comprehensive Stakeholder Identification:** Thorough identification of all stakeholders, including internal and external parties, with an interest or influence in the project.

3. **Role Recognition and Documentation:** Accurate documentation of stakeholder roles and their relation to the project.

4. **Stakeholder Register Creation:** Effective creation and maintenance of a detailed stakeholder register.

5. **In-depth Stakeholder Information Gathering:** Collection and documentation of comprehensive information for each stakeholder in the register.

6. **Thorough Stakeholder Analysis:** Detailed analysis, classification, and prioritization of stakeholders, including understanding their needs, expectations, and influence.

7. **Stakeholder Prioritization Using Provided Matrix:** Application of the given matrix to rank stakeholders effectively.

8. **Final Documentation Quality:** Accuracy and thoroughness in documenting the final version in the Stakeholder Register.

1. Select appropriate stakeholders and elicit their view of the business need referred to the problem or opportunity in question. Use different elicitation techniques such as interviews, workshops, surveys, and observations to elicit business requirements.

2. Focus on the new capabilities the business aims to acquire once the project's key deliverable is implemented. Avoid technical implementation details and solution-oriented statements during this stage.

3. Validate the elicited requirements by seeking feedback from stakeholders and subject matter experts. Refine the requirements based on their input to ensure accuracy, clarity, and feasibility.

4. Create a clear and concise documentation of the elicited business requirements. Use appropriate formats such as user stories, use cases, or requirement specifications, depending on the project's needs.

5. Document the final version of the business requirements. This final version will serve as an input for the Project Charter.

Example 1

Business Requirements for FreshMart's Online Grocery Shopping Platform:

The following business requirements were elicited through interviews with Jordan Taylor (Corporate Manager), workshops with the IT and Marketing departments, and surveys among potential users. They focus on the capabilities FreshMart aims to acquire with the new platform, without delving into technical implementation details. The requirements have been validated and refined based on feedback from stakeholders and will serve as an input for the Project Charter.

User Experience (UX) Requirements:

- User-Friendly Interface: The platform should be intuitive and easy to navigate, ensuring a seamless shopping experience for users.
- Search Functionality: Users should be able to easily search for products, view product details, and read reviews.
- Personalized Experience: Based on user preferences and purchase history, the platform should offer personalized product recommendations.

Security Requirements:

- Data Protection: User data, including personal and payment information, should be securely stored and encrypted.
- Transaction Security: All transactions on the platform should be secure, with multi-factor authentication options available for users.
- Regular Security Audits: The platform should undergo regular security audits to identify and rectify potential vulnerabilities.

Integration Requirements:

- Seamless Integration with Existing Systems: The platform should integrate smoothly with FreshMart's existing inventory and supply chain management systems.
- Mobile Compatibility: The platform should be accessible and fully functional on mobile devices, providing a consistent experience across devices.

Branding and Marketing Requirements:

- Brand Consistency: The platform's design and user interface should align with FreshMart's branding guidelines.
- Marketing and Promotion: The platform should support marketing campaigns, promotions, and discount codes.

Operational Requirements:

- Inventory Management: Real-time inventory updates to ensure product availability and prevent order cancellations.
- Order Management: Efficient order processing, tracking, and delivery scheduling functionalities.
- Customer Service: Integrated customer service chat and helpline options for user queries and support.

Feedback and Review Requirements:

- User Feedback: Users should be able to provide feedback on products and the overall shopping experience.
- Rating System: A rating system for products, allowing users to leave reviews and ratings.
- These business requirements were elicited through interviews with Jordan Taylor (Corporate Manager), workshops with the IT and Marketing departments, and surveys among potential users. They focus on the capabilities FreshMart aims to acquire with the new platform, without delving into technical implementation details. The requirements have been validated and refined based on feedback from stakeholders and will serve as an input for the Project Charter.

Example 2

Examples of business requirements in a project aiming at facilitating the merger of three companies:

- Acquire the capacity to Identify and rank the most important existing and underlying problems, risks, and opportunities.
- Acquire the capacity of teamwork among the members of the three boards of directors (C level) and among directors reporting to the board of directors (D level), of the three merger companies.
- Be able to recognize and leverage the strengths of the different management styles and methods existing in the three merger companies.
- Acquire the capacity to disseminate good news in the world business community.

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Examples of business requirements in a project allowing customers to handle orders online:

- Allow customers to place, follow-up, and change orders online without the intervention of the customer service department.

- Allow the company to invoice customers without human intervention from the accounting department.

- Allow customers and the company to have a summary and the status of all orders and invoices, including all past transactions.

- Allow customers and the company to have access to all past communications between the customer and the company.

- Allow the customer service department, during phone calls, to identify the calling customer immediately and have all related information at hand.

Section 3 Evaluation Criteria:

1. Focus on Business Capabilities: Emphasis on the new capabilities the business aims to acquire, avoiding technical details at this stage.

2. Clarity of Requirements: Ensuring accuracy and clarity in the refined business requirement that will be implemented.

3. Documentation: Creation of clear documentation of business requirements in appropriate formats.

4 Develop the Problem/Opportunity, Purpose, Goal, Outcome and Benefits Statements.

1. **Develop a Problem/Opportunity Statement**

   1.1. Utilize the information elaborated in exercise 1.

   1.2. Utilize the business requirements documentation.

   1.3. Utilize collaborative techniques. Avoid rushing to solutions. At this stage focus on understanding and agreeing upon the causes/components/aspects of the problem/opportunity/regulation that should be addressed with the project.

   1.4. Create a problem/opportunity statement with two sections: the current state and its consequences, and the desired future state and its consequences.

      1.4.1. Current state: describe the pain points of the current state expressed by stakeholders and the impact on finances, time, productivity, or competitive advantage.

      1.4.2. Future state: describe the desired outcome or condition that the organization aims to achieve with this project.

2. **Develop a Purpose Statement**

   2.1. Use the current state section of the problem statement to elaborate the purpose statement for the project, explaining "why" the project should be executed. Also explain the consequences of not addressing the problem or not exploiting the envisaged opportunity.

3. **Develop a Goal Statement**

   3.1. Utilize the Future State: Begin by referencing the 'future state' as described in the problem statement. This future state should articulate the desired situation. It serves as a foundation for defining the project goal.

   3.2. Define a Specific and Understandable Goal: The goal should be specific, clear, and concise. It needs to encapsulate what the project is set to achieve in a manner that is easily understandable to all stakeholders.

   3.3. Alignment with Identified Problem or Opportunity: Ensure that the goal directly addresses the problem or seizes the opportunity identified in the problem statement. This alignment ensures that the project remains focused on delivering value.

   Example:

   - Future State from Problem Statement: Suppose the problem statement indicates a need for a more efficient online shopping experience for customers.

   - Goal Statement: "Develop, complete, and launch the software application by the end of Q2, in alignment with the acceptance criteria that will be defined in the product scope section of the project management plan."

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- Explanation: This goal is specific (develop, complete, and launch the software), measurable (criteria in the product scope), achievable (with given resources and time), relevant (addresses the need in the problem statement), and time-bound (by the end of Q2). Note that the measurability of the goal can be established in a way that does not predetermine specific functions that will be established in the product scope as part of the project management plan if the project charter is approved and the project moves from initialization toward planning.

4. **Development of an Outcome Statement**

   4.1. Understand the Link to the Goal: Start by understanding how the outcome relates to the project goal. The outcome should be a measurable change or effect resulting from achieving the project goal.

   4.2. Define a Measurable and Timely Outcome: The outcome should be specific, clear, and quantifiable. It should be directly influenced by the project's deliverables and observable within the project's timeframe.

   4.3. Alignment with Project Goal and Future State: Ensure that the outcome aligns with the project goal and contributes to realizing the future state described in the problem statement.

   Example:

   - Relation to Goal and Future State: Given the goal is to develop, complete, and launch a software application, the outcome should reflect the software's impact post-launch.

   - Outcome Statement: "Achieve a customer satisfaction rate of 80% and a potential adoption rate of 50% as measured by a survey conducted as part of launching the software."

   - Explanation: This outcome is specific (customer satisfaction and potential adoption rates), measurable (quantifiable through a survey), directly related to the project goal (launching the software), and time-bound (measured at the time of software launch). It reflects the software's immediate impact, aligns with the project's aim to enhance the online shopping experience in a way that can be measured within the scope of the project and is not a benefit post-project.

5. **Development of a Benefits Statement**

   5.1. Connect to the Outcome: Start by identifying how the benefit is a long-term advantage or improvement resulting from the project's outcome. The benefit should extend beyond the immediate effects of the project and contribute to the broader objectives of the organization.

   5.2. Define a Long-term and Strategic Benefit: The benefit should focus on the long-term value added to the organization or stakeholders. It should be clearly linked to the project's outcomes and aligned with organizational goals.

5.3. Ensure Alignment with Project Outcome and Organizational Goals: The benefit should be a natural extension of the project outcome, providing lasting value that aligns with the overall goals of the organization.

Example:

- Relation to Outcome and Organizational Goals: Considering the project's outcome involves achieving high customer satisfaction and potential adoption rates, the benefit should reflect the long-term strategic advantages gained.

- Benefit Statement: "Sustained user growth and enhanced brand reputation."

- Explanation: This benefit statement is linked to a corporate goal (focusing on growth and reputation), long-term (sustained growth), and directly linked to the project outcome (high satisfaction and adoption leading to growth and reputation enhancement). It aligns with the overarching aim to solidify the company's market position and contribute to long-term business success.

5.4. Identify Benefits Throughout the Project Lifecycle: While focusing on long-term, post-project benefits, also recognize and identify benefits that may emerge during project execution or at project end. This includes possible phase benefits in projects that employ an incremental approach (delivering usable partial solutions that are completed in increments while being already used), as well as intangible benefits like lessons learned or know-how increase, even from failed projects. Acknowledging these benefits ensures a comprehensive understanding of the project's impact and value.

6. Document the final version of the Problem/Opportunity, Purpose, Goal, Outcome and Benefits Statements. This final version will serve as an input for the Project Charter.

Example

Problem/Opportunity Statement: Many online grocery shopping platforms are not user-friendly, lack product variety, and have questionable transaction security, leading to lost sales and frustrated customers. There's an opportunity to introduce a platform that addresses these issues, offering a user-friendly interface, a wide range of products, and secure transactions.

Purpose Statement: The project aims to address the challenges faced by users of current online grocery shopping platforms, ensuring a seamless and secure shopping experience. If these issues aren't addressed, the organization risks continued lost sales, customer dissatisfaction, and potential security breaches.

Goal Statement: Launch a user-friendly mobile application for online grocery shopping with a focus on security and a wide range of grocery options.

Outcome Statement: Develop and launch a mobile application for online grocery shopping by Q3, featuring a user-friendly interface, enhanced security measures, and a diverse product range, aiming to improve customer shopping experience and transaction security.

Benefits Statement: Long-term benefits include increased customer loyalty, improved market position, and a strong reputation for providing secure and diverse online grocery

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shopping. Additionally, project execution will enhance knowledge, and product launch will contribute positively to our image.

Section 4 Evaluation Criteria:

1. **Integration of Previous Exercises**: Effective use of information from previous exercises and business requirements documentation in statement development.

2. **Comprehensive Problem/Opportunity Statement**: Creation of a problem/opportunity statement with clear descriptions of the current state, its consequences, and the desired future state.

3. **Detailed Current State Analysis**: Inclusion of pain points, financial, time, productivity, or competitive impacts in the current state description.

4. **Future State Vision Clarity**: Clear description of the desired outcome or condition the organization aims to achieve.

5. **Purpose Statement Relevance**: Development of a purpose statement that explains the "why" of the project, based on the current state and consequences of inaction.

6. **Goal Statement Specificity and Alignment**: Creation of a specific and understandable goal statement that aligns with solving the identified and selected part of the problem or exploiting the selected part of the opportunity.

7. **Outcome Statement Appropriateness**: Assessment of the outcome statement for specificity, measurability, direct relation to the project goal, and timeliness.

8. **Benefit Statement Alignment and Scope**: Evaluation of the benefit statement for its long-term view, alignment with project outcomes, organizational goals, and recognition of benefits throughout the project lifecycle and/or at project end .

9. **Quality of Final Documentation**: Thorough and clear documentation of the final version of the Problem/Opportunity, Purpose, Goal, Outcome, and Benefits Statements for the Project Charter.

5 Select a Strategy to Achieve the Project Goal.

1. **Assemble a small group of individuals familiar with the project:** Bring together a diverse group of stakeholders, including project team members, subject matter experts, and decision-makers.

2. **Brainstorm potential strategies:** Read the problem, purpose, and goal statements as a group. Encourage free-flowing idea generation and brainstorming to generate as many potential strategies to attain the goal as possible. Write down all the ideas without evaluating them at this stage. A strategy answers the question "how" are you going to attain the goal. Usually there is more than one way to attain any goal. These alternative ways to attain the goal are different strategies. Identify them.

3. **Define selection criteria:** Establish a set of selection criteria that will be used to evaluate and compare the potential strategies. Consider factors such as, for instance, initial investment level, costs per year, speed of solution availability, effectiveness, the possibility of implementation with internal resources, risk, feasibility, alignment with organizational culture, stakeholder commitment, or other criteria appropriate for your project.

4. **Evaluate the potential strategies:** Create a decision matrix that includes the identified strategies and the weighted criteria. Evaluate each strategy against each criterion and assess its fulfilment level. Use a scale from 1 to 5 to numerically represent the fulfilment level, with 1 being the lowest and 5 being the highest.

5. **Calculate scores for each strategy:** Multiply the fulfilment level of each criterion by its corresponding weight and calculate a score for each strategy. Sum up the scores for each strategy to obtain an overall rating.

6. **Analyze the results:** Identify the strategy with the highest overall rating as the most suitable option for achieving the project goal. Consider the scores and compare the strategies based on their performance across the selection criteria.

7. **Select the strategy:** Based on the analysis and discussions within the group, select the strategy that aligns best with the project's goals, constraints, and priorities.

8. **Develop a high-level milestone schedule** or general roadmap as part of the selected strategy.

5. **Document the selected strategy:** Document the chosen strategy, including the rationale behind its selection and the evaluation process followed. This final version will serve as an input for the Project Charter.

Example of how to select a strategy to achieve the project goal

Example 1 (continuation of the same project)

1. Assemble the team: we've brought together a mix of stakeholders, including app developers, UX/UI designers, market researchers, grocery vendors, and decision-makers from the company.

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2. Brainstorming. We have brainstormed the following potential strategies:

- Develop the app in-house.
- Collaborate with an established app development company.
- Purchase and customize an existing grocery app platform.
- Partner with existing online marketplaces to introduce a grocery section.

3. Define selection criteria:

- Initial investment level
- Costs per year
- Speed of solution availability
- Effectiveness
- Possibility of implementation with internal resources
- Risk
- Feasibility
- Alignment with organizational culture
- Stakeholder commitment

4. Evaluate the potential strategies: Using a decision matrix, we evaluate each strategy against each criterion using a scale from 1 to 5.

5. Calculate scores for each strategy: After multiplying the fulfilment level of each criterion by its weight, we calculate a score for each strategy and sum up the scores for an overall rating.

6. Analyze the results:

- Develop the app in-house: 35
- Collaborate with an established app development company: 40
- Purchase and customize an existing grocery app platform: 30
- Partner with existing online marketplaces: 25

6. Select the strategy: Based on the analysis, collaborating with an established app development company has the highest score and aligns best with the project's goals, constraints, and priorities.

7. High-Level Milestone Schedule/General Roadmap:
- Project Initiation and Planning (Months 1-2):
- Requirement Gathering and Design Phase (Months 3-4):
- Development Phase (Months 5-8):
- Testing and Quality Assurance (Months 9-10):
- Launch Preparation and Marketing (Month 11):
- App Launch and Post-Launch Review (Month 12):

8. Document the selected strategy:

- Selected Strategy: Collaborate with an established app development company.

- Rationale: This strategy offers a balance between cost, speed, and effectiveness. By leveraging the expertise of a seasoned app development company, we can ensure a high-quality product while mitigating risks associated with developing an

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app from scratch. The evaluation process highlighted the strengths of this strategy in alignment with organizational culture and stakeholder commitment.

Example 2: AutoKomponenten GmbH and its research partners.

- Context: Project Charter for "1A1.1 Research and Development of Electric Motors"
- Project Name: Electric Motor Innovation Project
- Problem/Opportunity Statement: Problem: The current electric motor technology in the market is either inefficient or too costly, hindering the widespread adoption of electric vehicles (EVs). Opportunity: Developing a new, efficient, and cost-effective electric motor can position AutoKomponenten GmbH as a leader in the EV components market.
- Purpose Statement: To innovate and develop a new line of electric motors that are more efficient and cost-effective, enhancing the performance and affordability of electric vehicles.
- Goal Statement: Successfully develop and prototype a new electric motor that offers at least a 20% increase in efficiency and a 15% reduction in production costs compared to current market standards within 18 months.
- Business Requirements: High energy efficiency, Cost-effective production methods, Scalability for mass production, Compliance with industry and environmental standards
- Selected Strategy: Collaborate with leading research institutions and utilize cutting-edge materials and manufacturing techniques.

Process followed to identify and select this strategy:

Potential Strategies brainstormed:

- In-house Development
- Outsourcing to an External Firm
- Collaboration with Research Institutions (Chosen Strategy)
- Licensing Technology from Another Company

Selection Criteria brainstormed:

- Initial Investment Level
- Annual Operating Costs
- Speed of Solution Availability
- Effectiveness
- Implementation Feasibility
- Risk Level
- Alignment with Organizational Culture
- Stakeholder Commitment

Evaluation

Criteria/Strategy	In-house Development	Outsourcing	Collaboration with Research Institutions	Licensing Technology
Initial Investment Level	3	4	5	2
Annual Operating Costs	4	3	5	3

Speed of Solution Availability	2	4	5	3
Effectiveness	3	4	5	4
Implementation Feasibility	3	3	5	2
Risk Level	2	3	5	3
Alignment with Organizational Culture	4	3	5	2
Stakeholder Commitment	4	3	5	2
Total Score	25	27	40	21

Conclusion and Strategy Selection:

The strategy of "Collaboration with Research Institutions" scores the highest (40) among the considered strategies. It offers the best balance in terms of cost-effectiveness, risk management, alignment with organizational culture, and stakeholder commitment. This approach allows leveraging external expertise while maintaining control and alignment with the company's strategic goals. It is the most feasible and effective method for achieving the project goal of developing innovative and efficient electric motors.

High-Level Milestone Schedule/General Roadmap:

- Initial Research and Collaboration Setup (Months 1-3):

- Design and Development Phase (Months 4-9):

- Advanced Prototyping and Testing (Months 10-15):

- Final Prototype Development and Validation (Months 16-18):

- Project Review and Future Planning (Month 18):

Project Deliverables from the selected strategy:

- Key Deliverable: Prototype of the new electric motor.

- Intermediate Deliverables: Research reports, design blueprints, test results, prototype models.

Section 5 Evaluation Criteria:

1. Comprehensive Strategy Brainstorming: Quality of brainstorming session in generating a wide range of potential strategies without initial evaluation.

2. Selection Criteria Definition: Clear establishment of relevant and appropriate selection criteria for evaluating strategies.

3. Thorough Strategy Evaluation: Use of a decision matrix to evaluate each strategy against established criteria using a numerical scale.

4. Accurate Strategy Scoring: Correct calculation of scores for each strategy based on the criteria and their weight.

5. Analytical Results Review: Comprehensive analysis of the results to identify the most suitable strategy.

6. Strategic Selection Alignment: Selection of a strategy that best aligns with the project's goal, constraints, and priorities.

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7. High-level milestone schedule or general roadmap to implement the selected strategy.

8. Documentation of Selected Strategy: Thorough documentation of the chosen strategy, including the rationale and evaluation process.

6 Identify Deliverables Including the Key Deliverable of the Selected Strategy.

1. Understand the nature of deliverables:

    1.1. Deliverables are the tangible or intangible outputs of processes. To achieve the project goal, you need to create or acquire deliverables.

    1.2. There is a final deliverable, which we call the "key deliverable", and intermediate deliverables, which are the components of the key deliverable. The intermediate deliverables are the building blocks or enablers towards creating the key deliverable.

    1.3. Deliverables can be tangible or intangible.

    1.3.1. Tangible deliverables refer to physical or material items that can be seen, touched, or measured. These are concrete and observable outputs of a process. Examples of tangible deliverables include products, prototypes, reports, equipment, infrastructure, or any physical object that results of a process.

    1.3.2. Intangible deliverables are non-physical, abstract, immaterial, or intellectual items. Examples of Intangible deliverables include knowledge, expertise, skills, software, processes, systems, improved communication, cultural changes, or any intangible output that is produced or acquired in the project.

    1.4. Recognize that some deliverables are dependent on the completion of other deliverables. For example, the know-how to cook a new meal is a deliverable that must be ready before preparing the ingredients.

    1.5. Some necessary deliverables could have been accomplished in a previous project or pre-project. We need to identify them, but they are already available and ready to use.

    1.6. Example: if the goal is to make a Patagonian salad, the objectives leading to this goal are peeling and slicing the vegetables, preparing the dressing, and assembling the ingredients. The key deliverable is the Patagonian salad. And the intermediate deliverables are the vegetables washed and sliced (tangible), the salad dressing mixed (tangible), the bowl to mix the ingredients (tangible) and the know-how to make a Patagonian salad (intangible). The know-how is a deliverable that must be accomplished first to enable the other deliverables.

2. Identify deliverables:

    2.1. Utilize the selected strategy, involve stakeholders, and conduct a collaborative workshop to identify intermediate deliverables and the key deliverable.

    2.2. Review the selected strategy: Begin by thoroughly examining the selected strategy that will be implemented to achieve the project goal. Understand its components, actions, and desired outcomes.

    2.3. Break down the strategy: Break down the selected strategy into its constituent parts and associated activities. Identify the key steps or milestones associated with executing the strategy effectively.

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2.4. Identify intermediate deliverables: Analyze each step or milestone within the strategy and determine if there are any intermediate deliverables associated with them. These intermediate deliverables are the outputs that are necessary to progress towards the final key deliverable. Consider both tangible and intangible deliverables that are produced or acquired during the execution of the strategy.

2.5. Define the key deliverable: From the analysis of the selected strategy and its associated intermediate deliverables, identify the ultimate key deliverable that signifies the successful completion of the project. This key deliverable should align with the main project goal and fulfil the business requirements.

2.6. Consider dependencies and sequencing: Recognize the dependencies and sequencing of the intermediate deliverables in relation to the key deliverable. Understand the order in which the intermediate deliverables need to be accomplished to progress towards the key deliverable. This will help in planning and organizing the project activities effectively.

3. Document Deliverables: Create a list of identified intermediate deliverables and the key deliverable. This list may include some process-supporting deliverables such as plans and documents. This final version will serve as an input for the Project Charter.

Example:
- Goal: Launch a user-friendly mobile application for online grocery shopping with a focus on security and a wide range of grocery options.
- Key Deliverable: Fully functional mobile application for online grocery shopping.
- Intermediate Deliverables:
  - Market research report
  - App design mockups
  - Backend infrastructure
  - Payment gateway integration
  - Expertise in app development (knowledge and skills required to develop and launch the app)

Section 6 Evaluation Criteria:

1. Identification of Intermediate and Key Deliverables: Effective identification of both intermediate and key deliverables based on the selected strategy.

2. Strategy Review and Breakdown: Thorough review and breakdown of the selected strategy to understand its components, actions, and outcomes.

3. Analysis of Strategy Steps: Detailed analysis of each step or milestone in the strategy to identify associated intermediate deliverables.

4. Alignment of Key Deliverable with Goal: Identification of the key deliverable that aligns with the main project goal and fulfills business requirements.

5. **Recognition of Dependencies and Sequencing:** Understanding of the dependencies and sequencing of intermediate deliverables in relation to the key deliverable.

6. **Documentation of Deliverables:** Accurate and comprehensive documentation of all identified deliverables, including process-supporting ones, for the Project Charter.

7 Define Project Success Criteria.

1. Engage Stakeholders: Collaborate with key stakeholders to gather their perspectives and insights on project success criteria.

2. Gather Stakeholder Inputs: Utilize all available information about the project and conduct workshops or meetings with stakeholders to understand their expectations and criteria for project success. Utilize collaborative tools and techniques to encourage active participation and generate diverse viewpoints.

3. Analyze Stakeholder Inputs: Review and analyze the information gathered from stakeholder engagement. Identify common themes, patterns, and priorities among the stakeholder inputs. Consider different perspectives to ensure a comprehensive and inclusive definition of success criteria.

4. Develop a Draft Project Scorecard:

   4.1. Define all success criteria to be specific, measurable, and achievable.

   4.2. Incorporate the classical triple constraint (completion on time, completion within budget, acceptable level of quality).

   4.3. Consider some additional indicators identified through stakeholder collaboration. For instance:

      4.3.1. Customer satisfaction with the product

      4.3.2. Customer satisfaction with the project team

      4.3.3. Effectiveness of problem-solving

      4.3.4. Quality of communication

      4.3.5. Impact on the organization's workflow

      4.3.6. Alignment with corporate culture

5. Validate and Refine Success Criteria: Share the draft scorecard with stakeholders for validation and feedback. Seek agreement and consensus, addressing any concerns or suggestions raised by stakeholders. Refine the success criteria as necessary to ensure alignment with stakeholder expectations.

6. Create a final version of the scorecard and document it. This final version will serve as an input for the Project Charter.

Example of a Scorecard to measure Project Success

1. Launch within 6 months.

2. Stay within a budget of $500,000.

3. App quality: Less than 0.5% crash rate and pass all test cases.

4. 90% user satisfaction rate (4 stars or above).

5. Positive feedback from 85% of stakeholders.

6. Effective problem-solving within a week.

7. Weekly communication updates.

8. Seamless integration with existing systems.

9. Reflect company values and branding.

Section 7 Evaluation Criteria:

1. Development of Draft Project Scorecard:
   - Specificity, measurability, and achievability in defining all success criteria.
   - Inclusion of classical triple constraint criteria (time, budget, quality).
   - Integration of additional indicators identified through stakeholder collaboration (e.g., customer satisfaction, problem-solving effectiveness).

2. Final Documentation: Creation of a detailed and agreed-upon final scorecard version for the Project Charter.

8 Identify High-Level Risks, Assumptions, and Constraints.

1. Compile a List of Generic Risks: Review past projects and industry databases to create a comprehensive list of generic risks applicable to the project type, including:

    - Large project size in terms of effort and duration.
    - Extensive team size.
    - Numerous interfaces between components.
    - Complex project scope.
    - Unclear business benefits.
    - Conflicting or unrealistic requirements.
    - Dependencies on other projects.
    - Weak project sponsorship.
    - Need for procedural changes.
    - Limited project manager experience with similar projects.
    - Geographically dispersed team locations.
    - Adoption of new technologies.
    - Engagement with unfamiliar suppliers.
    - Intercultural incompatibilities among stakeholders.
    - Unresolved issues among stakeholders.
    - Challenges in a multilingual environment.

2. Engage Stakeholders: Collaborate with key stakeholders to gather their perspectives and insights on project risks, assumptions, and constraints.

3. Gather Stakeholder Inputs:

    1..1. Utilize all available information about the project, including the compiled list of generic risks.

    1..2. Conduct workshops or meetings with stakeholders to understand their views on project risks, assumptions, and constraints.

    1..3. Utilize collaborative tools and techniques to encourage active participation and generate diverse viewpoints.

4. Create the Risk Register: List identified risks and document them in the risk register as a draft.

5. Create the Assumptions Register:

    5..1. Classify Assumptions and Risks: Differentiate between assumptions and risks based on the combination of probability and impact.

    5..2. If an event is identified with a negative impact and the probability of its occurrence is deemed unacceptable, classify it as a risk and record it in the risk register.

    5..3. Conversely, if the negative impact is considered acceptable and/or the probability of occurrence is considered very low, record it in the assumptions register. Assumptions can also include items or events necessary for the project that the team believes are highly probable to be available.

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6. Create the Constraints Register:

    6..1. Recognize constraints as limitations beyond the control of the project team that must be managed. These constraints may include date restrictions, resource limitations, budgetary constraints, or any other factors that influence the project's scope, timeline, or available resources. Constraints should be expressed concisely and specifically as statements made by key stakeholders outlining the imposed limitations. For example, constraints may involve cost limitations (the project cannot exceed €10,000), time limitations (the project must be completed by June 10, 20xx), or resource limitations (all project team members must have bilingual proficiency in French and English).

    6..2. Register identified constraints in the constraints register as a draft.

7. Validate and Refine the Drafts: Share the draft documents with stakeholders for validation and feedback. Seek agreement and consensus, addressing any concerns or suggestions raised by stakeholders. Refine the lists of high-level risks, assumptions, and constraints as necessary to ensure alignment with stakeholder expectations.

8. Create a Final Version: Develop a final version of the risk register, assumptions register, and constraints register. These documents will serve as inputs for the Project Charter.

Example

Risk Register:

- Adoption of new technologies: As the project involves creating a new online platform, there's a risk associated with the adoption of new technologies and ensuring they integrate well with existing systems.
- Engagement with unfamiliar suppliers: If collaborating with a new app development company, there might be potential challenges in communication and alignment.
- User adoption: Even with a user-friendly interface, there's a risk that users might be resistant to change or prefer existing platforms.
- Security breaches: With any online platform, especially one handling transactions, there's always a risk of potential security breaches.
- Market competition: Competitors might introduce new features or marketing strategies that could affect the project's success.

Assumptions Register:

- The online shopping trend will continue to grow, and there's a market demand for a user-friendly grocery shopping platform.
- The necessary budget and resources will be allocated and available throughout the project's duration.
- Stakeholders, especially from the IT and Marketing departments, will provide the necessary support and feedback when required.
- The selected app development company will have the expertise and capability to deliver as per expectations.

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Section 8 Evaluation Criteria:

1. Risk Register: Accurate documentation of identified risks in the risk register as a draft.

2. Assumptions Register: Documentation of events as assumptions when their negative impact is acceptable or their occurrence probability is low.

3. Constraints Register: Specific documentation of identified constraints in the constraints register.

4. Final Documentation: final versions of the risk, assumptions, and constraints registers, ensuring thoroughness and clarity.

9 Define the project organigram for governance and project management

1. When there are multiple sponsoring organizations,
   a. The project initiator or the nominated project manager identifies key representatives from these organizations.
   b. These key representatives collaborate to establish a Project Governance Body (PGB) comprising representatives from involved organizations and their respective levels of authority. The authority delegated from their respective corporate governance to the members of the PGB may include elements such as the power to approve changes and resolve issues within the defined management reserves for the project and the mandate to work with their respective corporate governance to resolve changes and issues with impacts beyond the management reserves for the project from a certain value to be defined.
   c. The project governance body (PGB) determines the name of the person to play the role of head or speaker of the project governance body to play the role of sponsor, their level of authority and the protocol of consensus within the PGB.
   d. The authority delegated from the PGB to the person playing the role of head or speaker of the project governance body may include elements such as the power to approve changes and resolve issues within the defined management reserves for the project and the mandate to work with the PGB to resolve changes and issues with impacts beyond the management reserves for the project from a certain value to be defined.

2. When there is a single sponsoring organization. Corporate governance (CG) determines the name of the person to play the role of project sponsor and their level of authority. The authority delegated from corporate governance to the project sponsor may include elements such as:
   a. The power to approve changes and resolve issues within the defined management reserves for the project and the mandate to work with corporate governance to resolve changes and issues with impacts beyond the management reserves for the project.
   b. The power to approve the engagement of suppliers without any specific limit or the mandate to involve the purchasing department for procurements above a value to be defined.
   c. The power to approve decisions of the project manager regarding the hiring or discontinuation of human resources or the mandate to involve the HR department for any decision regarding hiring or discontinuation of human resources.

3. The project sponsor determines the name of the project manager and their level of authority. The authority delegated from the project sponsor to the project manager may include elements such as:

a. The power to approve changes and resolve issues within the defined reserves for contingencies and the mandate to work with the project sponsor for issues and changes with impacts beyond the reserves for contingencies.

b. The power to engage suppliers for procurements until a limit to be defined and the mandate to involve the project sponsor for procurements above a value to be defined.

c. The power to make decisions regarding the hiring or discontinuation of human resources or the mandate to involve the project sponsor for any decision regarding hiring or discontinuation of human resources.

4. The project sponsor or the project governance body determines the creation of a project assurance service to assure compliance of the project management function with established corporate standards, policies, and directives.

5. The result should be the names and the authority level of

a. the members of the project governance body (if there is a project board), including positions in the respective functional organizations,

b. the person playing the role of project sponsor, including their position in the functional organization and

c. the person playing the role of project manager.

Example

Project Governance Body (PGB):

- Members:
  o Jordan Taylor (Corporate Manager)
  o Chris Adams (Chief Technology Officer)
  o Emily Roberts (Chief Marketing Officer)
- Authority: The PGB has the collective authority to approve major project changes, especially those that exceed the defined management reserves. They also have the mandate to work with their respective corporate governance for decisions beyond the project's scope.

Project Sponsor:

- Name: Jordan Taylor
- Position: Corporate Manager at FreshMart Groceries
- Authority: Approve changes and resolve issues within a $100,000 limit. For changes beyond this limit, the issue must be escalated to the PGB.

Project Manager:

- Name: Alex Rodriguez
- Background: Alex has a decade of experience in managing e-commerce and mobile application projects. He previously held the position of Assistant Manager in the IT department at FreshMart.
- Position: Senior Project Manager at FreshMart Groceries

- Authority: Approve changes and resolve issues within a $20,000 limit. Engage suppliers for procurements up to $10,000. Make decisions regarding the hiring or discontinuation of human resources up to a team size of 3.

Project Assurance Service (PAS):

- Head: Laura Mitchell
- Authority: Ensure project compliance with corporate standards, policies, and directives. Review and audit project phases for quality assurance.
- Members:
  - Raj Patel (Technical Assurance Analyst)
  - Sofia Alvarez (UX Assurance Analyst)
  - Ahmed Ibrahim (Security Assurance Analyst)
  - Clara Nguyen (Compliance and Regulatory Assurance Analyst)

Section 9 Evaluation Criteria:

1. Identification of Key Representatives: Accurate identification of key representatives from multiple sponsoring organizations, if applicable.

2. Establishment of Project Governance Body (PGB): Effective formation of the PGB, including representatives with delegated authority levels.

3. Assignment of Head/Speaker of PGB: Clear determination of the role and authority of the head or speaker of the PGB, including consensus protocol.

4. Single Sponsoring Organization Protocol: Proper identification of the project sponsor.

5. Project Sponsor's Role and Authority: Clear definition of the project sponsor's role, authority, and scope of power, including the ability to make decisions regarding changes, procurement, and human resources.

6. Project Manager Appointment and Authority: Accurate assignment of the project manager and delegation of their authority, including limits on decision-making and procurement.

7. Project Assurance Service Creation: Establishment of a project assurance service to ensure compliance with corporate standards and policies.

8. Documentation of Governance Structure: Thorough documentation of the project governance structure, including names, positions, and authority levels of PGB members, project sponsor, project manager, and project assurance service personnel.

10 Elaborate the Project Charter

1. Gather Information and Decisions: Collect all relevant information and decisions made during project initiation.

2. Create a draft of the Project Charter: Compile and consolidate the available information and structure the Project Charter with the following elements:

    1. **Project name:** This is a basic element and may not be directly tied to a specific section but is an essential identifier for the project.

    2. **Problem/Opportunity Statement**: Comes from Section 4, where the Problem/Opportunity, Purpose, Goal, Outcome and Benefits Statements are developed.

    3. **Purpose Statement**: Also derived from Section 4, as part of the development of key project statements.

    4. **Goal Statement**: Originates from Section 4, in alignment with the development of the project's fundamental statements.

    5. **Outcome Statement**: Originates from Section 4.

    6. **Benefits Statement**: Originates from Section 4.

    7. **Business Requirements**: These are elicited and defined in Section 3 (Elicit Business Requirements).

    8. **Selected Strategy to Achieve the Project Goal**: This is developed in Section 5, where strategies are selected to achieve the project goal.

    9. **High-Level Milestone Schedule or General Roadmap**: derived from Section 5

    10. **Project Deliverables, including the Key Deliverable**: Comes from Section 6, which focuses on identifying deliverables, including the key deliverable of the selected strategy.

    11. **Inclusions and Exclusions:** derived from Section 1

    12. **Project Success Criteria:** Defined in Section 7 (Define Project Success Criteria), where success criteria are collaboratively developed and refined.

    13. **High-Level Risks:** Identified and documented in Section 8, involving the identification of high-level risks, assumptions, and constraints.

    14. **Assumptions:** Also from Section 8, as part of the process of identifying assumptions alongside risks and constraints.

    15. **Constraints:** Derived from Section 8, where constraints are identified and documented alongside risks and assumptions.

    16. **Organigram of the project** showing the governance level and the project management level. Definition of the respective level of authority: This is

established in Section 9, where the project organigram for governance and project management is defined.

17. **Stakeholder Register:** The creation of the Stakeholder Register is covered in Section 2 (Identify and Analyze Project Stakeholders).

3. Validate and Refine the Draft Project Charter: Share the draft project charter with relevant stakeholders for review and feedback. Address any concerns or suggestions raised and refine the charter as necessary.

4. Charter Approval Process: Submit the final project charter for approval by the governance body. The approval process may result in one of the following outcomes:

    4.1.1. Approval: The project candidate is approved, and the project can proceed to the planning stage.

    4.1.2. Denial: The project candidate is rejected.

    4.1.3. Rework: The project charter is sent back for further refinement and adjustments before resubmission.

5. Distribute and Communicate: Once the project charter is approved, the project sponsor distributes it to appropriate stakeholders, ensuring that the project manager's authority and responsibilities are well-known and understood in the management community in scope.

6. Project Manager's Authority in Effect: With the project charter signed and communicated, the project manager is officially authorized to manage the project. The project manager's authority is recognized within the organization, and they can proceed with managing the planning stage.

11 Project Charter Example 1

Project Name: FreshMart Digital Transformation Initiative

Problem/Opportunity Statement:

Many online grocery shopping platforms are not user-friendly, lack product variety, and have questionable transaction security, leading to lost sales and frustrated customers. There's an opportunity to introduce a platform that addresses these issues, offering a user-friendly interface, a wide range of products, and secure transactions.

Purpose Statement:

The project aims to address the challenges faced by users of current online grocery shopping platforms, ensuring a seamless and secure shopping experience. If these issues aren't addressed, the organization risks continued lost sales, customer dissatisfaction, and potential security breaches.

Goal Statement:

Launch a user-friendly mobile application for online grocery shopping with a focus on security and a wide range of grocery options.

Outcome Statement:

Achieve a customer satisfaction rate of 90% and a crash rate of less than 0.5% within three months of launching the mobile application.

Benefits Statement:

Long-term customer loyalty and market position enhancement through sustained increase in repeat customer transactions and building a reputation for providing a secure and diverse online grocery shopping experience. Additionally, knowledge increase during the project and contribution to image at product launch.

Business Requirements:

- User-Friendly Interface: Intuitive and easy navigation.
- Search Functionality: Easy product search, detailed views, and reviews.
- Personalized Experience: Recommendations based on user preferences and purchase history.
- Data Protection: Secure storage and encryption of user data.
- Transaction Security: Secure transactions with multi-factor authentication.
- Regular Security Audits: Identify and rectify potential vulnerabilities.
- Seamless Integration: Compatibility with FreshMart's existing systems.
- Mobile Compatibility: Consistent experience across devices.
- Brand Consistency: Align with FreshMart's branding guidelines.
- Marketing and Promotion: Support for campaigns and discount codes.
- Inventory Management: Real-time inventory updates.
- Order Management: Efficient order processing and tracking.
- Customer Service: Integrated chat and helpline.
- User Feedback: Feedback mechanism for products and overall experience.

- Rating System: Allow users to leave product reviews and ratings.

Selected Strategy to Achieve the Project Goal:

Collaborate with an established app development company. This strategy offers a balance between cost, speed, and effectiveness. By leveraging the expertise of a seasoned app development company, we can ensure a high-quality product while mitigating risks associated with developing an app from scratch.

High-Level Milestone Schedule:

- Market Research and Requirement Gathering: Month 1
- App Design and Mockups: Month 2
- Development Phase: Months 3-4
- Testing and Quality Assurance: Month 5
- Launch and Marketing: Month 6

Project Deliverables:

Key Deliverable: Fully functional mobile application for online grocery shopping.

Intermediate Deliverables:

- Market research report
- App design mockups
- Backend infrastructure
- Payment gateway integration
- Expertise in app development

Inclusions: Development of a user-friendly interface for the mobile application. Implementation of robust security protocols to ensure safe transactions and user data protection.

Exclusions: Directly addressing product variety. However, by creating a platform that vendors trust, and users love, we aim to indirectly attract a wider range of products.

Project Success Criteria:

- Launch within 6 months.
- Stay within a budget of $500,000.
- App quality: Less than 0.5% crash rate and pass all test cases.
- 90% user satisfaction rate (4 stars or above).
- Positive feedback from 85% of stakeholders.
- Effective problem-solving within a week.
- Weekly communication updates.
- Seamless integration with existing systems.
- Reflect company values and branding.

High-Level Risks:

- Delays in development due to unforeseen technical challenges.
- Potential security vulnerabilities in the app.
- Resistance from users accustomed to competitor platforms.
- Market dynamics and changing consumer preferences.

Assumptions:

- Stable market conditions during the project duration.
- Availability of necessary resources and expertise.
- Positive reception of the app by the target audience.

Constraints:

- Budgetary constraint of $500,000.
- Time constraint of 6 months for project completion.
- Adherence to FreshMart's branding and corporate guidelines.

Organigram of the Project:

Project Governance Body (PGB):

- Members: Jordan Taylor, Chris Adams, Emily Roberts
- Authority: Approve major project changes, especially those that exceed the defined management reserves.

Project Sponsor:

- Name: Jordan Taylor
- Authority: Approve changes and resolve issues within a $100,000 limit.

Project Manager:

- Name: Alex Rodriguez
- Authority: Approve changes and resolve issues within a $20,000 limit.

Project Assurance Service (PAS):

- Head: Laura Mitchell
- Authority: Ensure project compliance with corporate standards, policies, and directives.

12 Project Charter Example 2

Project Name: Tele-Medical Diagnostic Service for Rural Country X

Problem/Opportunity Statement:

Rural areas in Country X face a lack of medical services due to doctors migrating to larger cities, infrastructure challenges, and the low-income levels of the population. However, existing pharmacies present an opportunity to bridge this gap by introducing a tele-medical diagnostic service.

Purpose Statement:

The project aims to address the medical service gap in rural areas of Country X by leveraging existing pharmacies and introducing a tele-medical system. If not addressed, the rural population continues to face health risks and limited access to quality healthcare.

Goal Statement:

Implement a tele-medical diagnostic service in rural Country X, training pharmacists as 'assistant medical practitioners' to provide on-site diagnostics and basic medical services under the guidance of city-based doctors within 6 months

Outcome Statement:

Upon successful implementation of the tele-medical diagnostic service in rural Country X, the following outcomes are expected:

- A training and certification rate of at least 80% among participating pharmacists within 6 months.
- Maintenance of a system uptime of at least 90%.
- Achievement of an 85% patient satisfaction rate.
- Positive feedback received from at least 80% of participating city doctors.
- A minimum of 70% of rural patients using the service at least once within the first year
- Positive feedback received from at least 80% of participating city doctors.

Benefits Statement:

Long-term improvement in rural healthcare access, reduced healthcare risks, and enhanced overall health outcomes for rural communities. Increased collaboration between rural pharmacies and city-based medical facilities, leading to knowledge sharing and improved healthcare services.

Business Requirements:

- Tele-Medical System: A robust and user-friendly tele-medical system to facilitate remote consultations.
- Training Modules: Comprehensive training materials for pharmacists to become "assistant medical practitioners".
- Infrastructure: Adequate infrastructure to support the tele-medical system, including reliable internet connectivity, power backup solutions, and diagnostic equipment.

- Integration with City Hospitals: Seamless integration with medical facilities in the nearest city for real-time consultations and emergency referrals.
- Data Protection: Secure storage and encryption of patient data.
- Patient Awareness: Programs to educate the rural population about the benefits and usage of the tele-medical system.

Selected Strategy to Achieve the Project Goal:

The chosen strategy is to implement a tele-medical diagnostic service using existing pharmacies. Alternative strategies, such as building a hospital in the rural area, were discarded due to the dispersed population and transportation challenges.

High-Level Milestone Schedule:

- Needs Assessment and Infrastructure Evaluation: Month 1
- System Development and Integration: Months 2-3
- Training of Pharmacists: Month 4
- Pilot Testing: Month 5
- Full-scale Launch: Month 6

Project Deliverables:

- Key Deliverable: Fully functional tele-medical diagnostic service.
- Intermediate Deliverables:
    - Needs assessment report
    - Tele-medical system setup
    - Training modules for pharmacists
    - Integration protocols with city hospitals
    - Patient awareness materials and campaigns

Inclusions: Development of the tele-medical system, training programs for pharmacists, and integration with city hospitals.

Exclusions: Building new medical facilities in rural areas and direct employment of doctors in these areas.

Project Success Criteria:

- Successful training and certification of at least 80% of participating pharmacists within 6 months.
- Achieve a 90% system uptime.
- 85% patient satisfaction rate.
- Positive feedback from 80% of participating city doctors.
- At least 70% of rural patients using the service at least once within the first year.

High-Level Risks:

- Resistance from pharmacists or local communities.
- Technical challenges in setting up and maintaining the tele-medical system.
- Potential misdiagnoses due to limitations of remote consultations.
- Connectivity issues affecting real-time consultations.

Assumptions:

- Pharmacists are willing to undergo training and adopt new roles.
- The rural community will be receptive to the new service.
- City-based doctors are willing to provide remote consultations.

Constraints:

- Limited budget of 2 Million USD allocated for the project
- Dependence on reliable internet connectivity.
- Geographical dispersion of rural pharmacies.

Organigram of the Project:

- Project Governance Body (PGB):
  - Members: Representatives from the Ministry of Health, local community leaders, and heads of participating pharmacies.
  - Authority: Approve major project changes and ensure alignment with national health policies.
- Project Sponsor:
  - Name: Dr. Amina Yusuf, Director of Rural Health Initiatives.
  - Authority: Approve changes and resolve issues within a $50,000 limit.

- Project Manager:
  - Name: Samuel Okonkwo, with a background in healthcare management and experience in rural health projects.
  - Authority: Approve changes and resolve issues within a $10,000 limit.
- Project Assurance Service (PAS):
  - Head: Dr. Benjamin Osei, a seasoned medical professional with experience in telemedicine.
  - Authority: Ensure project compliance with medical standards, policies, and directives, and ensure the quality of training and services provided.