| GENERAL PROJECT INFORMAT | ION | | | |
|------------------------------|--|--|----------|--|
| PROJECT NAME | | IMPORTANT REMINDER | | |
| PROJECT SPONSOR | | A narrative written charter must be circulated and signed | | |
| PROJECT MANAGER | | by the project sponsors. You | | |
| EMAIL ADDRESS | | can attach a completed | | |
| PHONE NUMBER | | version of this template to your narrative written charter in an | | |
| ORGANIZATIONAL UNIT | | effort to keep it short and | | |
| PROCESS IMPACTED | | concise. Please make sure | | |
| EXPECTED START DATE | | you meet with the project team and sponsors before | | |
| EXPECTED COMPLETION DATE | | completing this template. | | |
| EXPECTED SAVINGS | | Much of the information required will need to come | | |
| ESTIMATED COSTS | | from a discussion with team | | |
| GREEN BELTS ASSIGNED | | members and sponsors. | | |
| BLACK BELTS ASSIGNED | | | | |
| DESCRIBE THE PROBLEM OR ISSU | IE, GOALS, OBJECTIVES, AND DELIVERABLES OF | THIS PROJECT | | |
| PROBLEM OR ISSUE | | | | |
| PURPOSE OF PROJECT | | | | |
| BUSINESS CASE | | | | |
| GOALS / METRICS | | | | |
| EXPECTED DELIVERABLES | | | | |
| DEFINE THE PROJECT SCOPE AN | D SCHEDULE | | | |
| WITHIN SCOPE | | | | |
| OUTSIDE OF SCOPE | | | | |
| TENTATIVE SCHEDULE | KEY MILESTONE | START | COMPLETE | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| DEFINE THE PROJECT RESOURCE | S AND COSTS | | | |
|-------------------------------|----------------------------|-------------|-----|-------------|
| PROJECT TEAM | S AND COSIS | | | |
| SUPPORT RESOURCES | | | | |
| SPECIAL NEEDS | | | | |
| COST TYPE | VENDOR / LABOR NAMES | RATE | QTY | AMOUNT |
| LABOR | | | | |
| MISCELLANEOUS | | | | |
| | | TOTAL COSTS | | |
| DEFINE THE PROJECT BENEFITS A | ND CUSTOMERS | | | |
| PROCESS OWNER | | | | |
| KEY STAKEHOLDERS | | | | |
| FINAL CUSTOMER | | | | |
| EXPECTED BENEFITS | | | | |
| TYPE OF BENEFIT | DESCRIBE BASIS OF ESTIMATE | | | EST BENEFIT |
| SPECIFIC COST SAVINGS | | | | |
| ENHANCED REVENUES | | | | |
| HIGHER PRODUCTIVITY (SOFT) | | | | |
| IMPROVED COMPLIANCE | | | | |
| BETTER DECISION MAKING | | | | |
| LESS MAINTENANCE | | | | |
| OTHER COSTS AVOIDED | | | | |
| | | | | |
| DESCRIBE PROJECT RISKS, CONS | TRAINTS, AND ASSUMPTIONS | | | |
| RISKS | | | | |
| CONSTRAINTS | | | | |
| ASSUMPTIONS | | | | |
| Prepared by: | | Date: | | |

DISCLAIMER

Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk.