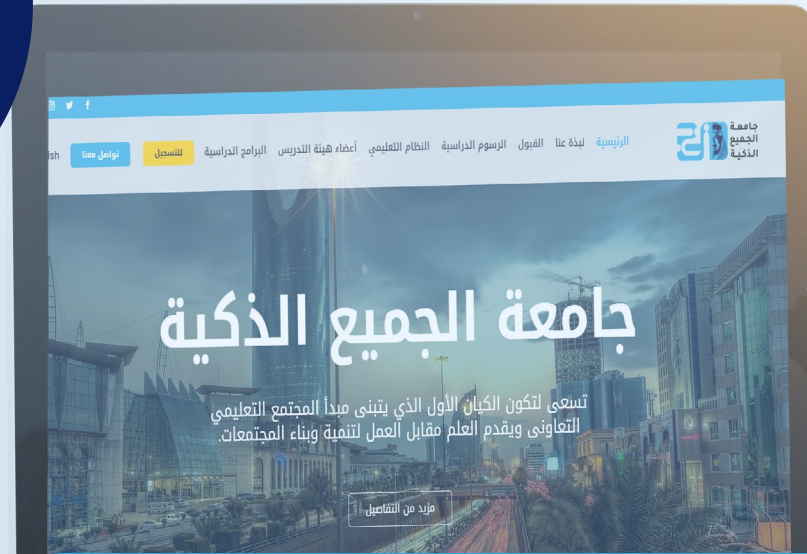


PART I :

Initiate & Plan a Project



**The Project Charter
&
The Project Plan**



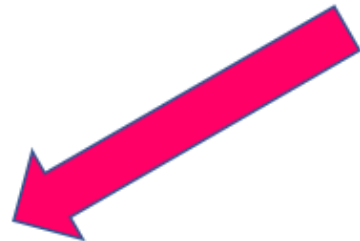
In the previous lessons...

- The term **Project Documentation** refers to documents that are created throughout the Project Life Cycle. These documents, such as **the Project Plan, Project Schedule or Project Budget**, define activities, procedures and guidelines to be followed by the Project Team.
- **Project Documentation** has several purposes. In addition, there are certain project documents that must be created at a specific Project Phase, as they set the stage for the next step, such as **the Project Plan** which must be created **before the project execution phase can begin**.

In the previous lessons...

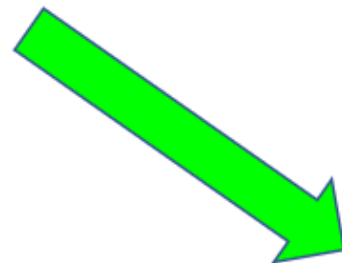
- **Project Documentation** by Project Phase

Projects vary in size and complexity and some might require more comprehensive **Project Documentation** than others.



Project Initiation

Project Charter, Business Case,
Project Kickoff Meeting Agenda.



Project Planning

Project Plan, Project Budget, Project Schedule,
Scope Management Plan, Change Plan, WBS,
Risk Management Plan.

Chapter objectives

- Discover **the Project Charter**
- Learn the main differences between the Project Charter and some of the rest of the key Project Documents.
- Identify **the Project Plan** and its relation with the Project Charter.

Syllabus

A

I- What is a Project Charter?

II- What is included in the Project Charter?

III-How to Develop a Project Charter?

**IV- Project Charter vs
The other Project Documents**

B

I- What is a Project Plan?

II- Who creates Project Plans?

III-Characteristics of Project Plans

IV- Elements of a Project Plan you shouldn't overlook

V- Project Plan v/s Project Management Plan

PART A:

THE PROJECT CHARTER

I- What is a Project Charter?

II- What is included in the Project Charter?

III-How to Develop a Project Charter?

**IV- Project Charter
vs
The other Project Documents**

A- I- What is a Project Charter?

I-1- Definition

According to the PMBOK Guide, « *a Project Charter is a document issued by the Project Initiator or Sponsor that formally authorizes the existence of a Project and provides the Project Manager with authority to apply organisational resources to Project Activities* ».

 **A Project Charter** establishes **the Project**, names **the Project Manager**, and provides them with the power and funding necessary to carry out the Project.

High-level details are contained in the Project Charter.

A- I- What is a Project Charter?

- Throughout the Project Lifecycle, **the Project Charter** plays an essential role in keeping things on track.
- **A Project Charter** is also known as a **Project Definition Document** or **Project Initiation Document (PID)** is a formal and short document that clearly defines **the Objectives, Scope, Goals, Stakeholders, and Teams** involved in the Project.

A- I- What is a Project Charter?

- **A Project Charter** defines the Project and gives Stakeholders guidance.
- **A Project Charter** must be **signed by a person outside the Project** who is in charge and has access to the necessary funding.
- The person that signs documents may be a sponsor, senior management, the PMO, etc.
- Although the **Project Managers** is not responsible for establishing **the Project Charter**, their expertise in Project Management may allow them to assist the **Project Sponsor** in doing so.

A- I- What is a Project Charter?



- A Project does not exist without **the Project Charter**, nor can a **Project Manager** be appointed or empowered.
- A Project is an intended course of action and requires funding.
- Before starting the Project, **the Sponsor** conducts the **Feasibility Study**, **cost-benefit analysis**, and review benefits **Management Plan**.

A- I- What is a Project Charter?

- Changes to **the Project Charter** are uncommon, and only the Sponsor or Top Management may do so.
- A Project may unofficially start when **the Sponsor** gets an idea about it. Afterward, they will conduct a **Cost-Benefit Analysis** to see if it is profitable. If the Project aligns with their **Business Objectives**, they will pursue it.



Then they will create a **Project Charter** to launch the Project.

A- I- What is a Project Charter?

I-2- The importance of a Project Charter

- **A Project Charter** is especially important when gaining and sustaining executive buy-in.
- It allows executives to see **the Business Value of a Project**, which is critical in saving it from scrutiny and risking having it delayed or even being scrapped.
- This could be because some executives didn't see or understand **the Business Value** in it from their perspective.

A- I- What is a Project Charter?

- **The Project Charter** should act as an executive overview of your Project so that any new **Executive** or **Senior Leader** can refer to it, understand it, and evaluate it.
- Consider the reasons that so many Projects and initiatives fail. It isn't necessarily due to bad ideas and poor planning or a lack of talent and Resources.
- Oftentimes, it simply comes down to never having proven the **Projects' value to the Executive Team.**

A project charter has the following elements:

Core Team Members This lists key team members, including the Project Manager.	Goal Goals are Vision and concrete deliverables that make the goal come alive.	Objective Objectives are Mission . These are measurable targets that the Project aims to achieve. Objectives must be SMART
Summary Project Status This gives an overview of the Project Status, such as Project Start Date , estimated Completion Date , and Project Benefit .	Stakeholders This shows the entities that can impact or be impacted by the Project. Investors, any Government Agency, etc., may be a part of it. The Sponsor's name , signature , and date appear as the final item in a Project Charter.	
	Deliverables These are the specific outcomes the Project is expected to achieve.	
Milestones The Project Milestone is a significant point or event in the Project. This could be a Kick-Off Meeting , mobilization to site, phase end, final report submission, completion of a deliverable, etc. The Milestones are listed along with an approximate due date .	Scope This is the high-level Scope of the Project.	
	Business Case This gives a justification for the Project's Existence .	
	Assumptions They are conditions taken as true or valid without proof. They are recorded in the assumption Log.	
Opportunity This is the problem-solution statement. What is this Project intending to fulfill? What advantages is this Project bringing to the Sponsor?	Constraints These are limitations on the Project Objective , for example, time, budget, scope, quality, etc. As the Project evolves, the Constraints may change, especially for highly uncertain Projects using the Agile approaches.	

A- II-What is included in the Project Charter?

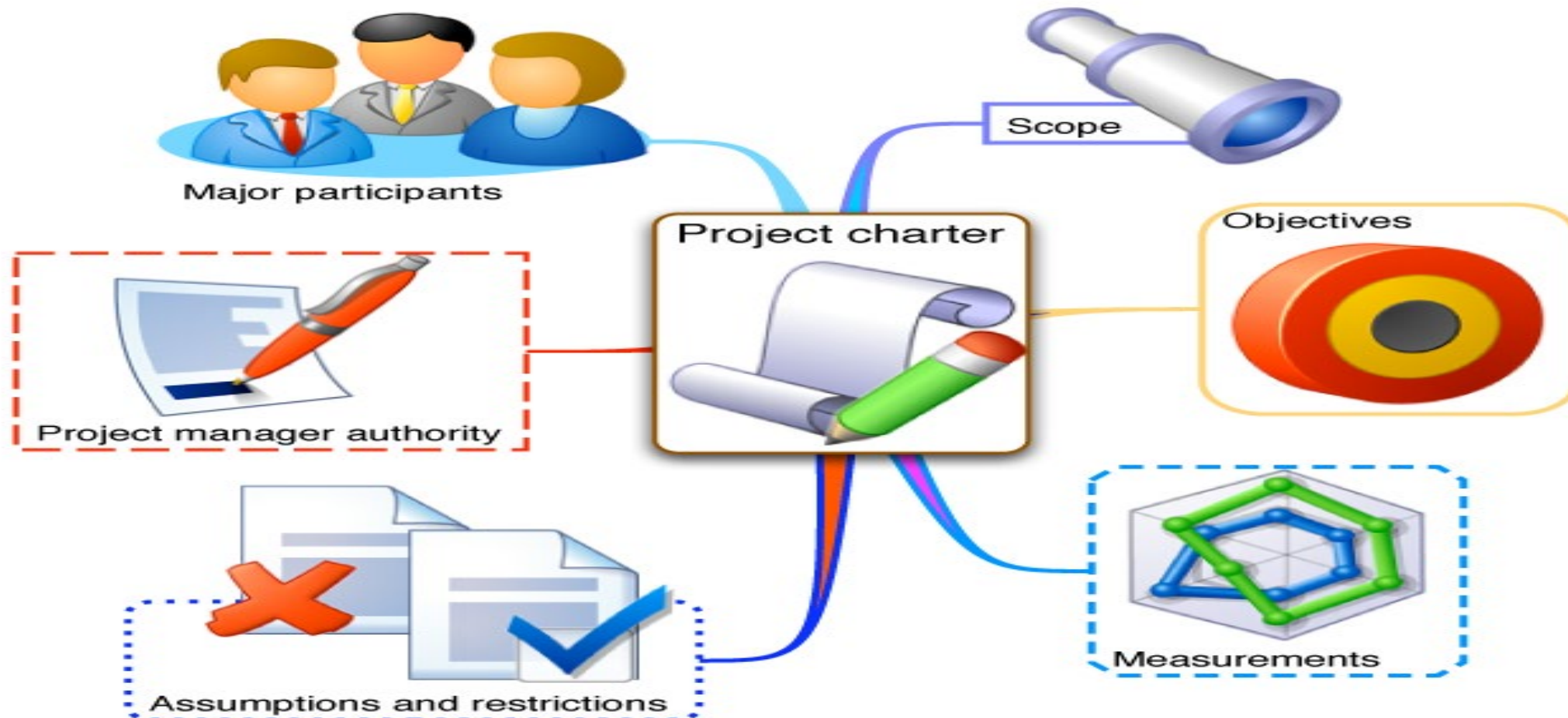


The Project Charter typically includes but not limited to the following information related to the Project:

- Name, Description, Purpose
- Project Objectives
- Expected Benefits
- Deliverables
- Assigned Project Manager
- Assumptions and Constraints

- Major Project Stakeholders
- Expectations
- Acceptance Criteria
- Major Project Milestones
- Estimated Budget
- Risks and Issues
- Approval Criteria

A- II-What is included in the Project Charter?



A-III-How to Develop a Project Charter?

- **A Project Charter** development process is shown in the below image.

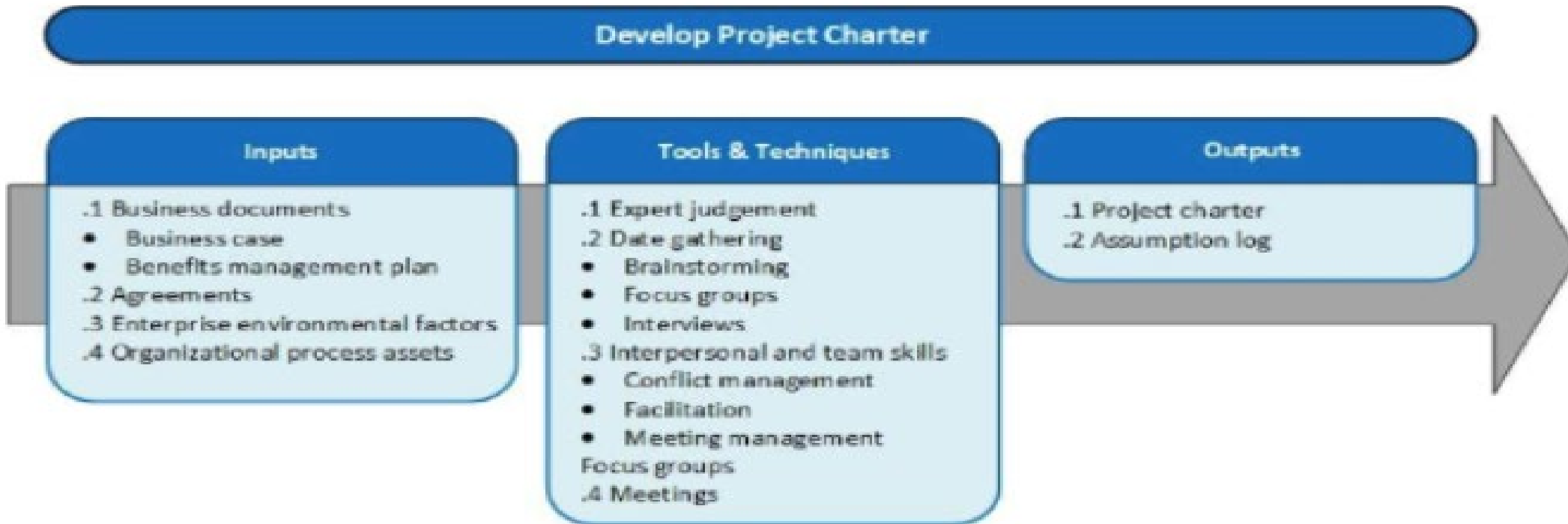


Figure 7.1 Develop Project Charter: Inputs, Tools and Techniques, and Outputs.

A-III-How to Develop a Project Charter?

III-1- Steps needed to build a Project Charter

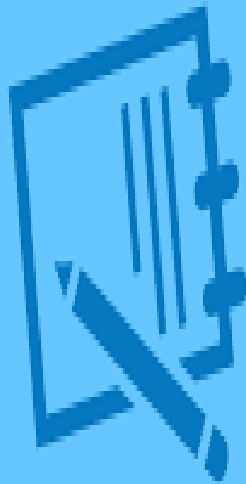
Typically, a Charter has **four basic steps**.

1- Determine the Project Vision

2- Describe the Project Organization

3- Plan the Approach to Implementation

4- List the Risks and Issues



A-III-How to Develop a Project Charter?

This Charter can be **extended** to **8 steps**:

Step 1	Step 2
1. Identify the Project Vision Determine the Project Scope, Major Deliverables, and the Objectives. Explain why the Project is needed. Scope Objectives Deliverables	2. Identify the Stakeholders and the Customers = Describe the Project Organization Describe the Stakeholders involved in the Project. Create an Organizational Chart and specify the reporting lines as well as describing Roles and Responsibilities.



A-III-How to Develop a Project Charter?

How to Develop a Project Charter



Step 3

3. Create an Organizational Chart = Plan the Approach to Implementation

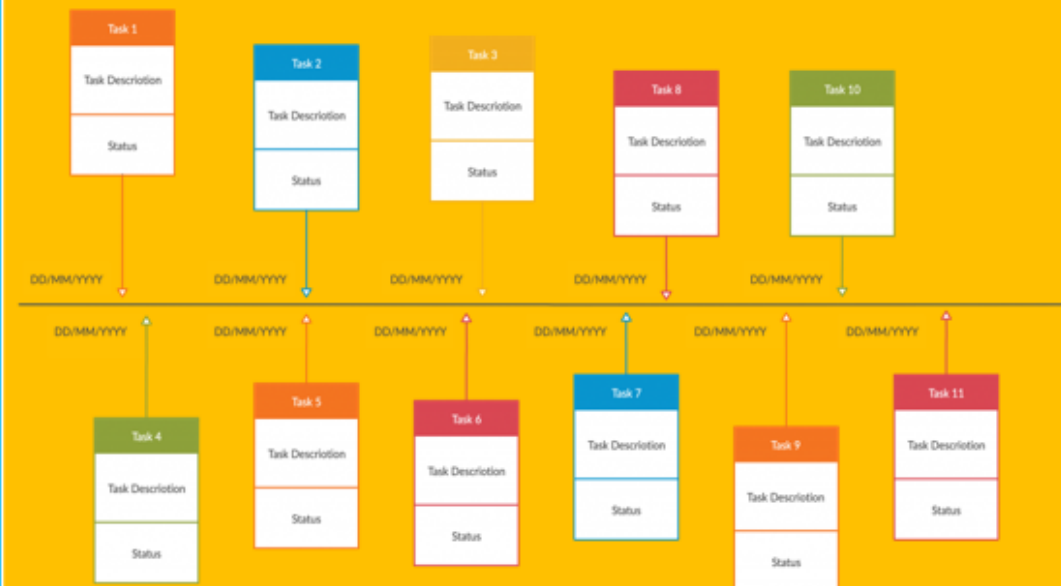
Plan the activity lists to be completed and include **major phases**, Project Milestones, and Deliverables while creating an **Implementation Plan**.



Step 4

4. Define Project Milestones = List the Risks and Issues

Identify **Risks**, **dangers**, **premises**, **Constraints**, and **Issues**.



A-III-How to Develop a Project Charter?

Step 5

5. Create a Resource Plan

List down all the resources that you need for the project; equipment, machines, people, materials, etc. This can help you when allocating your budget.

Step 6

6. Set the Budget for the Project

List down the expenses your organization will have to bear in order to carry out the plan. As these expenses may change during the project, you can make rough estimations. Also, note down the person who will be responsible for authorizing the approval of the expenditure.



A-III-How to Develop a Project Charter?

Step 7

7. List Down the Dependencies, Constraints, and Risks

Dependencies: Identify and list down project dependencies, or the activities that will have an impact on the initiation or the completion of another task.

Constraints: Figure out the factors that would hinder the progression of the project outcomes. For example, lack of resources or time.

Risks: Risks could occur during any stage of the project lifecycle. It's important that you identify these beforehand and have taken precautions.

Step 8

8. Lay Out the Implementation Plan

This is where you will put together an **Action Plan**, highlighting the **key dates** or **milestones**.

Action Plan Template

Objectives	Tasks	Success Criteria	Time Frame	Resources

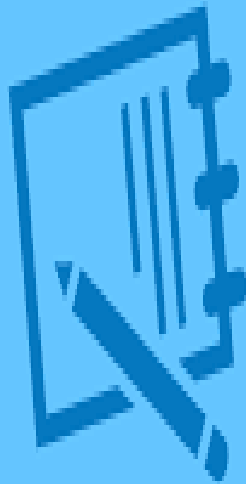
Action Plan Template (Click on the template to edit it online)



A-III-How to Develop a Project Charter?

III-2- Visualizing the Project Charter

- Usually, a **Project Charter** spans for 5-6 pages. This is one of the major reasons why they get overlooked in **the Project Management Process**.
- An easier way to write a **Project Charter** that everyone can quickly read and understand, with minimal effort is through **visualization**.
- **Project Charters** that incorporate **graphic elements** like the ones below help you bring together all **Project Charter** elements onto one page.
They are easy-to-read and visually pleasing.



Lecture 7

III-How to Develop a Project Charter?

Template 1

OBJECTIVES	PRINCIPLES	ROADMAP											
		2019						2020					
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
		Marketing			Market Launch	Market Campaign	Market Campaign	Marketing Strategy					
		Development			Develop App	Develop App	Develop App	Develop App	Develop App	Develop App	Develop App		
		Design			UI/UX Design	User Interface	UI/UX Design	UI/UX Design	UI/UX Design	UI/UX Design	UI/UX Design		
		Sales			Sales Communications	Sales Communications	Sales Communications	Sales Communications	Sales Communications	Sales Communications	Sales Communications		
Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard		

TEAM						KEY ACTIVITIES						IN SCOPE					
Project Charter Template																	

How to
Develop a
Project Charter

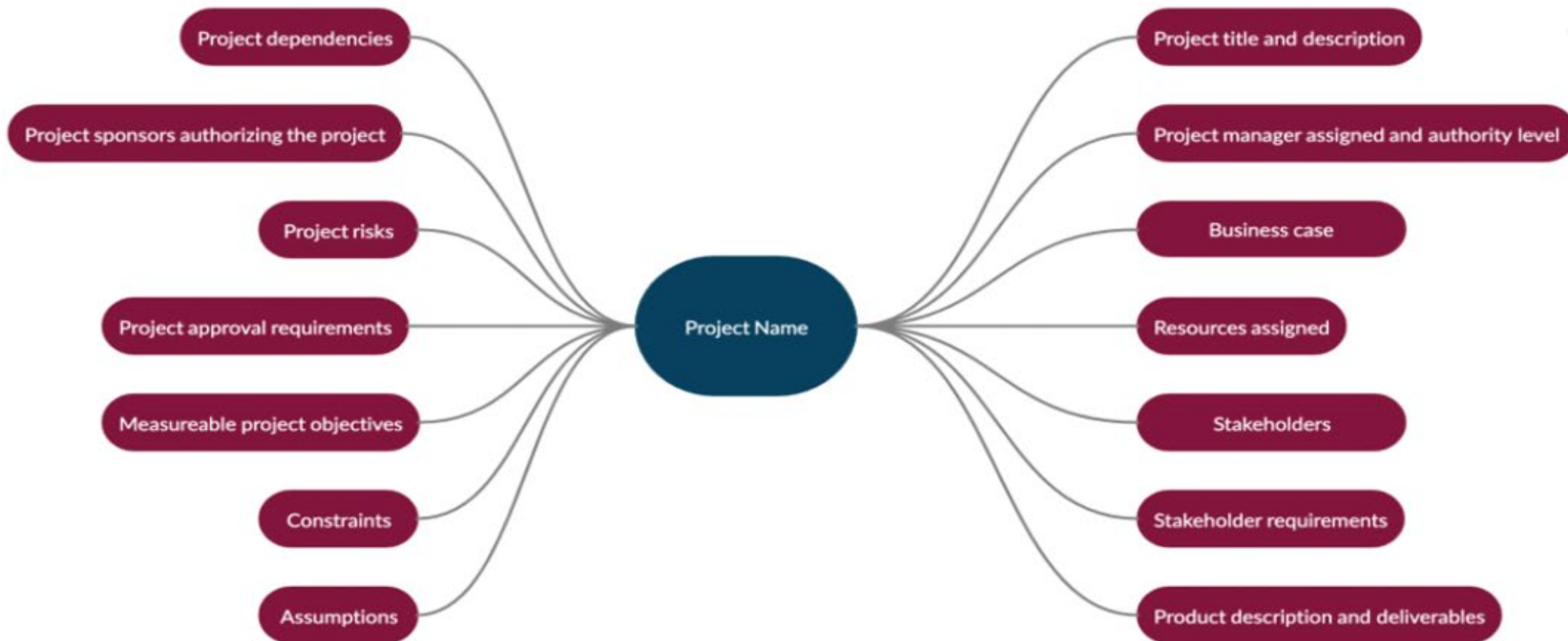


A-III-How to Develop a Project Charter?

How to Develop a Project Charter



Template 2



Project Charter Example

Lecture 7

A-III-How to Develop a Project Charter?

Template 3

How to Develop a Project Charter



PROJECT CHARTER			
PROJECT NAME		SCOPE STATEMENT	
PROJECT DESCRIPTION			
INITIAL REQUIREMENT	PROJECT MANNAGER	STRATEGIES	
	KEY STAKEHOLDERS		
PROJECT PRIORITIES	PROJECT ASSUMPTIONS	SUCCESS CRITERIA	
	CONSTRAINTS AND RISKS		
PROJECT GOALS	COST ESTIMATES	MEETINGS	
LIST OF DELIVERABLES	SCHEDULE ESTIMATES		

One Page Project Charter

A-III-How to Develop a Project Charter?

How to Develop a Project Charter



Project name <i>Name your project. Make sure this is descriptive enough that most people will understand what you're working on.</i>	Project objectives <i>What deliverables and assets do you plan to achieve by the end of the project?</i>
Project manager <i>Who is the point of contact for this project?</i>	Project scope <i>What are the boundaries of your project deliverables? Which initiatives are not included in the project?</i>
Last revision date <i>Your project charter is a living document. Including the last revision date can be helpful for team members who are frequently checking back on the charter.</i>	Project team and resources <i>Who is working on this project? Which resources (e.g. people, tools, and budget) are available for this work.</i>
Project purpose <i>Why are you working on this project?</i>	Stakeholders and approvers <i>Who are the project stakeholders? Who needs to approve the project charter or any project</i>

III-How to Develop a Project Charter?

III-3- Tips for Creating a Project Charter

The following tips are helpful in developing a Project Charter:

Keep it Short and Clear

The Project Charter provides high-level information, so keep it short and precise.

Keep the number of sections minimum, organize the information well for easy referencing, and label each section.

Make it a Collaborative Effort

Involve experienced professionals and key Stakeholders in developing **the Project Charter**.

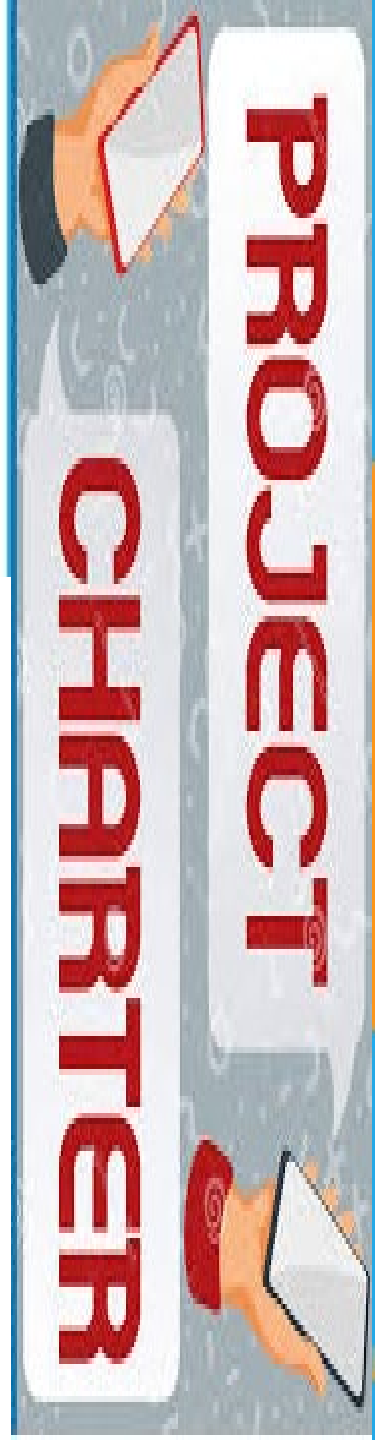
It will make **the Project Charter** robust.

Use a Template

Every Organization has a **Project Charter** template.

This is standard and acceptable.

Using it will save time and get quick Stakeholder buy-in.



III-How to Develop a Project Charter?

Project Charter

A Project Charter is a living document for an improvement team that outlines the presenting problem, the target and the boundaries of a process improvement effort.



Problem Statement

The problem captured in the form of a measurement



Business Case

The business reasons for doing the project



Goal Statement

The target of the process measurement



Timeline

When each project phase will be completed



Scope

What's in and what's out of the project



Team Members

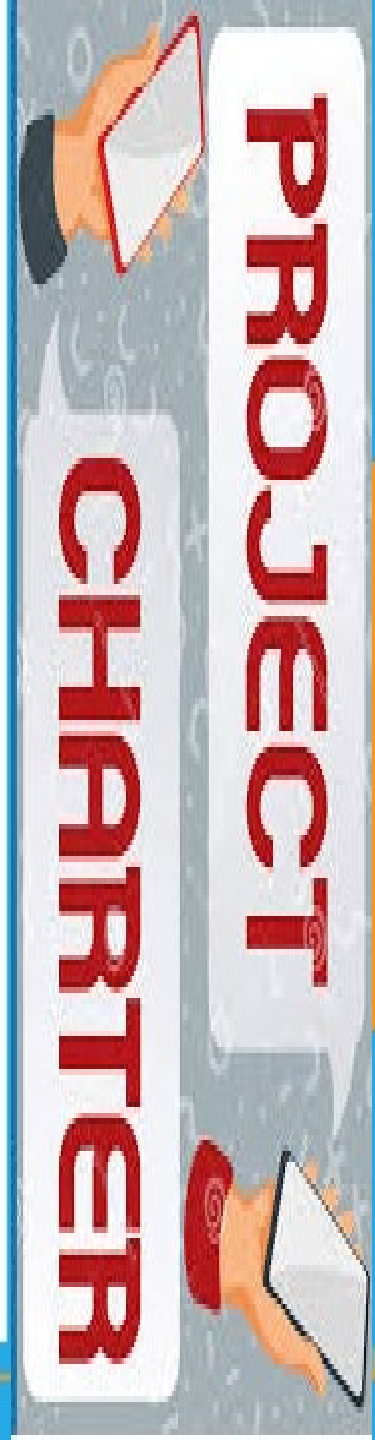
The people who will participate in the project

PROJECT CHARTER

PROJECT

A- IV- Project Charter vs some other Project Documents

- The primary purpose of a **Project Charter** is authorizing **the Project Managers (PM)** to begin an approved Project.
- It is officially signifying that they and their team are allowed to utilize **organizational resources** such as *people, technology, and finances* to complete the **Project Objectives**.



A- IV- Project Charter vs some other Project Documents

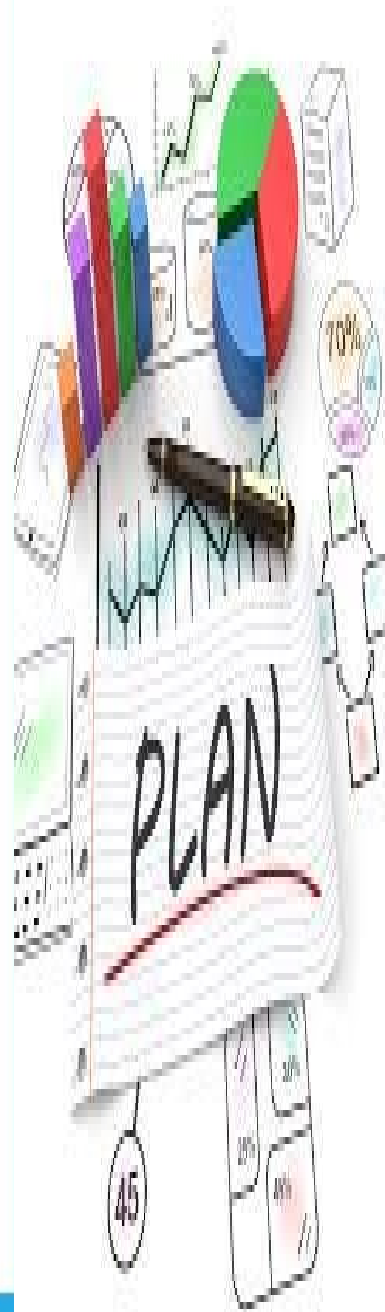
A-IV-1- Project Charter vs Project Plan

- **The Project Charter** is a high-level initiation document that consists of only a few pages. It lists the project objectives, scope, vision, team, and their responsibilities and stakeholders.
- **A Project Plan**, on the other hand, is a detailed document that describes how to accomplish the project objectives. It elucidates the project deliverables, action plan, the required resources, and milestones.
- It's created during the project planning phase and is a compilation of several other documents.



A- IV- Project Charter vs some other Project Documents

- **Project Plan** is quite broader concept. **A Project Plan** expresses the Objectives & Requirements of the Project in terms of:
 - **Project Scope**
 - **Project Schedule**
 - **Resource Requirement**
 - **Project cost estimation**
 - **Project Quality** and
 - **Project Risk**



A- IV- Project Charter vs some other Project Documents

A-VI-2- Project Proposal vs Project Charter

- **The Project Proposal** is a document that contains the details of the Project that the Organization wants to implement.
- This document is presented to the donors for the purpose of reviewing it and deciding whether the donor will finance the proposal or not.
- The way **Project Proposals** are written varies from one Organization to another and from one donor to another.



A- IV- Project Charter vs some other Project Documents

- **Project Proposal** and **Project Charter** are two different documents and their purposes are different as well.
- Both **Proposal** and **Charter** are crucial Project Documents that outline very different concepts within a project.
- However, many PMP aspirants mix up them because they sound quite similar.



A- IV- Project Charter vs some other Project Documents

PROJECT PROPOSAL **VS** PROJECT CHARTER

- Takes place in the initiating phase
- The owner is project director
- The proposal is created once an idea is conceived.
- Reference document which defines the project objectives

- Takes place in the planning phase
- The owner is project **manager**
- Project charter is created once the proposal is approved.
- Persuasive document that convinces the stakeholders



A- IV- Project Charter vs some other Project Documents

A-VI-3- Project Scope vs Project Charter

- **Project Scope** is the part of **Project Planning** that involves determining and documenting a list of specific project **Goals, Deliverables, Tasks** and **Costs**.
- **Project Scope** is a detailed outline of all aspects of a Project, including all **related activities, Resources, Timelines**, and **Deliverables**, as well as the **Project's Boundaries**.
- **A Project Scope** also outlines key stakeholders, processes, assumptions, and constraints, as well as what the project is about, what is included, and what isn't.
- All of this essential information is documented in a **scope statement**.



A- IV- Project Charter vs some other Project Documents

- During the Project, this documentation helps the Project Team remain focused and on task.
- **The Scope Statement** also provides the Team with guidelines for making decisions about change requests during the Project.
- Essentially, the Charter contains an overview of **the Project Scope** and **the Project Scope Statement** breaks it down into more detail. **The Scope** should be clear and concise.
- There should be no ambiguity around what the outcome of the Project will be.



A- IV- Project Charter vs some other Project Documents

What makes up a Scope?

The Scope definition of a software Project consists of the following key aspects:



A- IV- Project Charter vs some other Project Documents

A-VI-4- Project Brief vs Project Charter

- A **Project Brief** allows Project Managers to come prepared to meetings with all of the information their teams need. Or, at the very least, a plan to get all of the info needed for the teams to be successful.
- A **Project Brief** is created *after* the Project Charter is signed, the Project is started, and Project Management Plans are developed.
- A **Project Brief** provides a **shorter version of the Project Plans** so Stakeholders can review it briefly and grasp the Planning Processes.



A- IV- Project Charter vs some other Project Documents

PROJECT BRIEF

Description

You have to cover the background of the project, timeline in which it has to be completed



Background

brief description of the project's history, prerequisites of the project and how the project will be carried out.



Output

provide a brief description of the service or capability that you intend to develop, create or modify via this project.



Schedule

Details of milestones, key project outputs, and details on implementation planning.



Cost

Project costs section covers required budget and its usage with an estimate for further funds if needed



Scope

Project scope is the part of project brief which includes determining a list of project goals, functions, tasks, deadlines and documenting them



PROJECT BRIEF COMPONENTS

An important part of a project



PART B:

THE PROJECT PLAN

**I- What is a
Project Plan?**

**II- Who creates
Project Plans?**

**III-Characteristics of
Project Plans**

**IV- Elements of a
Project Plan you
shouldn't overlook**

**V- Project Plan v/s
Project
Management Plan**

B-I- What is Project Plan

- A **Project Plan** , also called a **Work Plan**, is a blueprint of the key elements your team needs to accomplish in order to successfully achieve your project goals.
- Your **Project Plan** should include information about your **Project Schedule**, **Scope**, **due Dates**, and **Deliverables**, and it should be built in a platform that everyone on your Team can access.
- By creating **the Project Plan** in a **Work Management System** , we can **plan**, **track**, and **report on work**—all in the same place.



B-I- What is Project Plan

- A good **Project Plan** is one of the most essential elements of success in **Project Management**, from preventing **Scope Creep** , **overblown budgets**, and **missed deadlines** to *minimizing stress* and *frustration*.



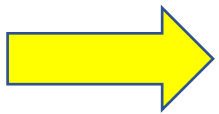
So,
how do you create a good **Project Plan** and what are the essential elements of a Project Plan?



B-II- When do we create the Project Plans?

A **Project Charter** is a tool you can use to get signoff from Key Stakeholders *before* getting started on a Project. As a result, you should create a **Project Charter** *before* you work on your **Project Plan** .

- A **Project Charter** should only include the **Project Objectives, Scope, and Responsibilities**: It's a simplified version of a **Project Plan** .



Once your Charter has been approved, you can create a **Project Plan** to provide a more in-depth blueprint of the key elements of your Project.



B-III- Who creates the Project Plans?

- The obvious answer to this is: “**Project Managers**”. But everyone who has to manage Projects in their roles can benefit from creating **Project Plans** before starting a new Project, especially in cases of similar or recurring Projects.
- A **Project Plan** saves you the time it takes to recreate the same Project over again.
- **Team Members** and **Stakeholders** involved in the Project and its results may provide **input, expertise, costs**, and other relevant information to be added in and approved before **the Project Manager** puts finishing touches on the **Project Plan**.



B-IV- Characteristics of Project Plans

- A **Project Plan** can be considered to have **5 key characteristics** that have to be managed:

Scope

defines what will be covered in a Project.

Resource

what can be used to meet the Scope.

Time

what tasks are to be undertaken and when.

Quality

the spread or deviation allowed from a desired standard.

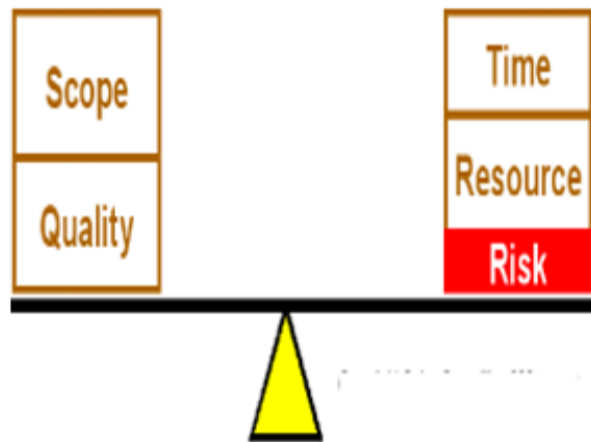
Risk

defines in advance what may happen to drive the plan off course, and what will be done to recover the situation.



B-IV- Characteristics of Project Plans

Balanced Plans



Characteristics of Project Plans



Bad Plan Example



B-IV- Characteristics of Project Plans

- **Project Plans** are important because they provide a **shared vision** for what the Project aims to accomplish.
- **Project Plans** can become a powerful **communication tool** within the Team throughout the Project.
- They serve as an **important written reference** for the **Project Manager, Team Members,** and **External Stakeholders.**
- These Plans also help to **mitigate Risk** and **maintain Quality** at all stages of the Project — **from Planning to Completion** .



B-IV- Characteristics of Project Plans

- **Project Plans** give **clarity** on the **responsibilities** of each **Team Member** and **Stakeholder** in the Project.
- They also **organize** the **Project's work** from start to finish and **prevent extraneous work** from **crowding out critical tasks**.
- Keep in mind that creating and working with a flawed project plan is just as bad as working without one.
- **Timeline**, **costs**, and **deliverables** should be detailed clearly to show the **Scope** of your project.
- In the ten sections below, you'll find ten essential elements of a **Project Plan** you shouldn't overlook.



OUTLINE OF BUSINESS
JUSTIFICATION &
STAKEHOLDER NEEDS

RISK ASSESSMENT
& MANAGEMENT PLAN

LIST OF REQUIREMENTS
& PROJECT OBJECTIVES

DEFINED ROLES
& RESPONSIBILITIES

PROJECT SCOPE STATEMENT

RESOURCE ALLOCATION

LIST OF DELIVERABLES
& ESTIMATED DUE DATES

QA PLAN

DETAILED PROJECT SCHEDULE

COMMUNICATION PLAN

INGREDIENTS
FOR A PERFECT
PROJECT PLAN

B-V- Project Management Plan v/s Project Plan

- A **Project Plan** and **Project Management Plan** can refer to the same thing, or they can be different. In some Organizations, we may see a distinction between these terms, and others will use them interchangeably.
- A **Project Plan** and a **Project Management Plan** are essential documents used in the Project Life Cycle of a Project and ensure that you have a smooth functioning of your Project..

PROJECT
PLAN
VS
PROJECT
MANAGEMENT
PLAN



Project Plan	Project Management Plan
Higher level plan	Lower level plan
Detail level is low	Detail level is high
Deals with "What" question	Deals with "How" question
Visionary document	Execution document
Provides the vision of what the project steps will be like	Provides a complete plan and to execute the vision of the project plan

Meaning

Project Management Plan is the sole document used to describe the project management approach or system used in the implementation of the project plan, by the project team.



A project plan would encompass every single detail that there is to a project. It emphasizes on the exact sequence of everything that is going to take place in a project.

Project Plan

Higher-level-view plan

Level



Project Management Plan

Lower-level-view plan



Role

Project Plan

A visionary document that plots the project in steps towards the vision or objective

Project Management Plan

An execution document that plots the activities of the project and the tools and techniques, which will be used, to achieve the vision/objective stated in the project plan

Help to Project Manager

Project Plan

Gives the project manager the vision of what the project steps and stages will be like

Project Management Plan

Gives the project manager the definitive plan and develops a system to execution the vision of the project plan

Details

Project Plan

Detailed plan about the start of the project through till its end

Project Management Plan

High-detailed plan about how to start the project and monitor its every move through till its end

Question

Project Plan

This plan deals and addresses the main question: what

Project Management Plan

This plan deals and addresses the main question: how

Conclusion

A project plan and a project management plan both are essential documents used in the life cycle of a project, and ensures that you have a smooth functioning of your project at all times.

SUMMARY

A top-down view of a wooden desk. In the upper right, a portion of a silver laptop is visible. To its right is a white cup filled with dark coffee. Below the cup is a white smartphone with a black screen. In the center, a spiral-bound notebook with a white cover and a blue pen lies diagonally. A black pen is also visible near the top of the notebook. A bright yellow rectangular banner is positioned on the left side of the image, containing the word 'SUMMARY' in white, bold, sans-serif capital letters.



What is a Project Charter?

Tips to Create a Good Project Charter



1



Define the Project Vision

Organize the Project Structure



2

Make a Project Charter

3



Have an Implementation Plan

Estimate Risks, Issues & Budget



4

Project Charter

Project Title

Write Project Name here

Project Manager

Project Manager

Project Start Date

Start date?

Project End Date

End date?

Project Sponsor

Project Sponsor

Business Need

Write business need here.

Project Scope

Write project scope here.

Risks and Issues

List the project risks & issues here!

Deliverables

List project deliverables here.

Assumptions/Dependencies

List project assumptions/dependencies here.

Milestones Schedule

Milestone

Target Completion Date

Actual Date

Write milestone 1 here

Target date?

Actual Date?

Write milestone 2 here

Target date?

Actual date

Project Team

Approval/Review Committee

Project Manager

Project Manager?

Sponsor

Project Sponsor?

Technical Lead

Project Technical Lead?

Business Division Head

Division Head?

Team Members

*List project team members
here!*

Business Unit Head

Unit Head?

Finance Manager

Finance Manager?

Project Charter Template

PROJECT TITLE

Employee and Rewards recognition Application

DESCRIPTION

Automate and simplify rewards and recognition program with easy-to-use and customizable cloud-based solution.

BUSINESS NEED

Build a cost-effective rewards and recognition program that is scalable, customizable, and meets your company's goals.

Improve organization ability to attract and recruit high quality talent and compete in the Market

Component of healthy Workplace

Element of Performance Management

Overall create healthy workplace and retention of quality talent

CORE TEAM MEMBERS

Name

Role

Mark Tim

Project Manager

Vijay Kshyap

Team Leader

Neelam

Business Analyst

Nina

Graphic Designer

KEY STAKEHOLDERS

Name

Role

Microsoft

Sponsor

Investors

Shareholders

Users

Users

OBJECTIVES

To create a friendly environment and healthy place where resources would enjoy working in the organization and maintain long term professional relationship

To recognize resource for their commendable and high quality service and commitment

Automate and simplify your rewards and recognition program with our easy-to-use and customizable cloud-based solution.

GOALS

The goal of the project is to retain and hire high quality resources. Set standards for employees so they have concrete goals to reach and encourage resources to set goals that are Specific, Measurable, Attainable, Relevant and Timely – that provides employees a clear path to follow and gives their supervisors established metrics to measure progress.

SUMMARY PROJECT STATUS

Project Start Date:

2021-04-15

Project Completion Date:

2021-09-15

Overall process impacts:

New Customizations or Changes

Potential Financial Budget:

\$100,000,000

SCOPE

The scope is to create a new Employee and Rewards recognition full fledged Application where user and supervisor measure their respective progress.

OPPORTUNITY

Currently, Microsoft employee recognition portal doesn't help to measure progress neither encourages high quality resources. Microsoft foresees an opportunity to improve their HR processes so that they can attract the best talent available in the Market

MILESTONES

Requirement Gathering

Current Business Process Analysis

Project Presentation

Future Business Innovations

Performance Analysis

Final Application Delivery

STATUS

In Progress

In Progress

Not Started

Not Started

Not Started

Not Started

DUE

2021-04-17

2021-04-26

2021-06-25

2021-07-25

2021-08-04

2021-09-09

DONE

NA

NA

NA

NA

NA

NA

CONSTRAINTS

- 1) Time Constraint
- 2) Budget Constraint
- 3) Resource Constraint

ASSUMPTIONS

- 1) We assume that the above estimation is based on the consideration that would be no major changes
- 2) We assume resources be available as required else there would be delay in overall deliveries
- 3) We assume stakeholders active participation else there would be a delay in deliveries

DELIVERABLES

- 1) Wireframes and prototype explaining the flow of the applications
- 2) Deliverables will be pushed every 3-4 weeks
- 3) Licences and plugin required will be provided by Sponsor
- 4) Hosting services will be purchased and provided by the client
- 5) IT Department will test new security and privacy settings.

SPONSOR NAME

MATTHEW WATSON

SIGN & DATE

PROJECT PROPOSAL

VS

PROJECT CHARTER

PROPOSAL



A project proposal is a detailed document that is used to persuade a sponsor and/or a group of stakeholders that a project needs to be carried out to solve a particular business problem or opportunity. This document identifies the work that needs to be carried out and explains the management plan how the project will be managed. The project director is the owner of this process.

CHARTER



A project charter is also known as a project definition document is a formal and short document that clearly defines the objectives, scope, goals, stakeholders and the teams involved in the project. According to the PMBOK Guide, the project charter is an official document that formally authorizes a project or a phase and documenting initial requirements that satisfies stakeholders' need and expectation.

Project Brief



Executive
summary and
Background



Objectives
and expected
benefits



Deliverables
and Scope



People,
resources,
stakeholders



Constraints,
dependencies
and risks

Differences between...

- | • Project Charter | • Project Scope Statement |
|------------------------------------|-----------------------------|
| • Project purpose or justification | • Project scope description |
| • Measurable project objectives | • Acceptance criteria |
| • High-level requirements | • Project deliverables |
| • High-level project description | • Project exclusions |
| • High-level risks | • Project constraints |
| • Summary milestone schedule | • Project assumptions |
| • Summary budget | |
| • Stakeholder list | |
| • Project approval requirements | |
| • Assigned project manager | |
| • Name of sponsor | |





INGREDIENTS FOR a PERFECT PROJECT Plan



Poor planning can doom your project before work even begins. Changing expectations, shrinking budgets, and frustrating miscommunications can derail even the simplest project — and make life unnecessarily stressful for everyone involved.

Include these 10 essential elements in your project plan to prevent nasty surprises, hit your targets, and keep your project running smoothly from day 1 to successful finish.

CONGRATS, YOU'VE COMPLETED YOUR PROJECT
PLAN! NEXT STEP:
KEEP ALL YOUR PROJECTS ORGANIZED AND ON TRACK



A red pushpin is pinned to the top right corner of the white sticky note.

Thank
you! 