

PART I :

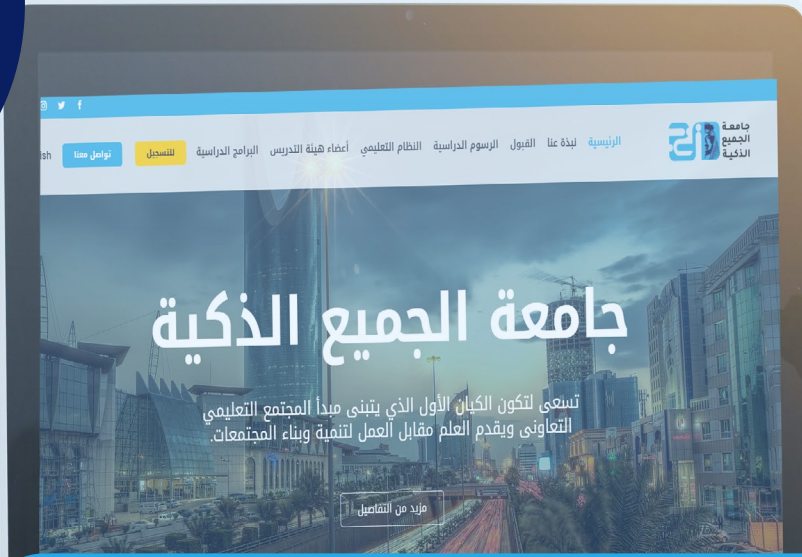
Initiate & Plan a Project

The Project Charter

Lecture 3



جامعة الجميع الذكية
EVERYONE'S SMART UNIVERSITY



In the previous lessons...

A Project:

- A project is a **series of tasks that need to be completed to reach a specific outcome.**
- A project can also be defined as a set of inputs and out achieve a particular goal.
- Projects can range from simple to complex and can be managed by one person or a hundred.



In the previous lessons...

Project Life Cycle:

The project life cycle includes the steps required for [project managers](#) to successfully manage a project from start to finish. There are 5 phases to the project life cycle (also called the 5 process groups)—initiating, planning, executing, monitoring/controlling, and closing. Each of these project phases represents a group of interrelated processes that must take place.

- **Initiating Phase**
- **Planning Phase**
- **Executing**
- **Monitoring and Controlling Phase**
- **Closing Phase**

Project Management Life Cycle



In the previous lessons...

The Project Planning?

- Project planning is a crucial stage that comes right after initiation in project management phases. Through proper planning, you streamline the entire project into a series of steps and ensure the availability of all the resources on time.
- Project constraints such as time, scope, and costs are discussed in the project planning process, and mitigation plans are developed after the identification of potential risks. By comparing the actual progress with the project plan, you can also monitor the performance of your team and take the necessary steps to improve it.

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In the previous lessons...

A GUIDE TO THE Project Management Body of Knowledge

*project integration management
project scope management
project time management
project cost management
project quality management
project human resource management
project communications management
project risk management
project procurement management*

Project Management Institute
Standards Committee



The 7 main areas (PMBOK) where Project Planning is important for successful projects



Chapter objectives

- Discover **the Project Documents**
- Identify **the Project Charter**.
- Learn the main differences between the Project Charter and the rest of the key Project Documents

Syllabus

**I- The Project
Documentation**

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

**III- The
importance of
a Project
Charter**

**IV- What is
included in
the Project
Charter?**

**V-How to
Develop a
Project
Charter?**

I- The Project Documentation

I-1- Definition

- **Project documentation** is the process of recording the key project details and producing the documents that are required to implement it successfully. Simply put, it's an umbrella term which includes all the documents created over the course of the project.
- Project documents come in many forms – from [project proposals](#) and business cases, to [project plans](#) and project status reports.



I- The Project Documentation

I-2- Examples of Project Documents

- It's difficult to strictly define what should be documented over the course of a project, as it's strongly dependent on the kind of project you are managing.
- A major project at a big enterprise usually requires a lot more paperwork than a small-scale initiative at an early-stage startup.
- Here's the minimum set of documents you need:

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I- The Project Documentation

document	purpose
action and issue tracker	track pending actions and open issues
project charter	a sort of contract between the customer and contractor
project organization	overview of people and roles in the project
project roles and responsibilities	description of roles and responsibilities
project plan	activities and timeline
project budget	project cost (plan and actual)
stakeholder matrix	list of stakeholders involved in the project
risks log	critical risks
project communication plan	structures communication and meetings in a project
scope statement/requirement specification	description of customer requirements
change request tracker	track changes to the project scope

II- Project Charter vs The other Project Documents

I-1- 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 is a formal and short document that clearly defines the objectives, scope, goals, stakeholders, and 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 satisfy stakeholders' needs and expectations.

II- Project Charter vs The other Project Documents

- The primary purpose of a project charter is authorizing the Project Manager (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.

II- Project Charter vs The other Project Documents

- **A Project Charter** officially begins a project or phase.
- **A Project Charter** is a defining if an early framework of the goals, scope, and deliverables at a high level.
- It clearly defines the commitment of the PM (Project Manager), senior management, and the rest of the organization, and acts as a formal agreement to deliver on that commitment while also offering clear details about where you're heading and how you're getting there.

II- Project Charter vs The other Project Documents

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

II- Project Charter vs The other Project Documents

I-2- 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.

II- Project Charter vs The 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**



II- Project Charter vs The other Project Documents

I-3- 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.

II- Project Charter vs The 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.

II- Project Charter vs The 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

II- Project Charter vs The other Project Documents

I-4- 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*.

II- Project Charter vs The 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.
 - Note that a **project's scope statement** should not be confused with its charter; a
 - simply documents that the project exists.
-
- **WHAT MAKES UP A SCOPE:** The scope definition of a software project consists of the following key aspects



II- Project Charter vs The other Project Documents

- To determine project scope, you need to know the :
 - *Project objectives*
 - *Deliverables*
 - *Process (tasks/method)*
 - *Timeline (or rough deadlines)*
 - *Budget*



II- Project Charter vs The other Project Documents

- 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.

III- 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.

III- The importance of 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.

IV-What is included in the Project Charter?

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

IV-What is included in the Project Charter?

ELEMENTS OF THE PROJECT CHARTER

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BACKGROUND | OBJECTIVES

SCOPE | RISKS | TIMELINES

STAKEHOLDERS, CUSTOMERS, CLIENTS

MANAGERS | TEAM MEMBERS

BUDGET | SPONSERS | COMMITTEES

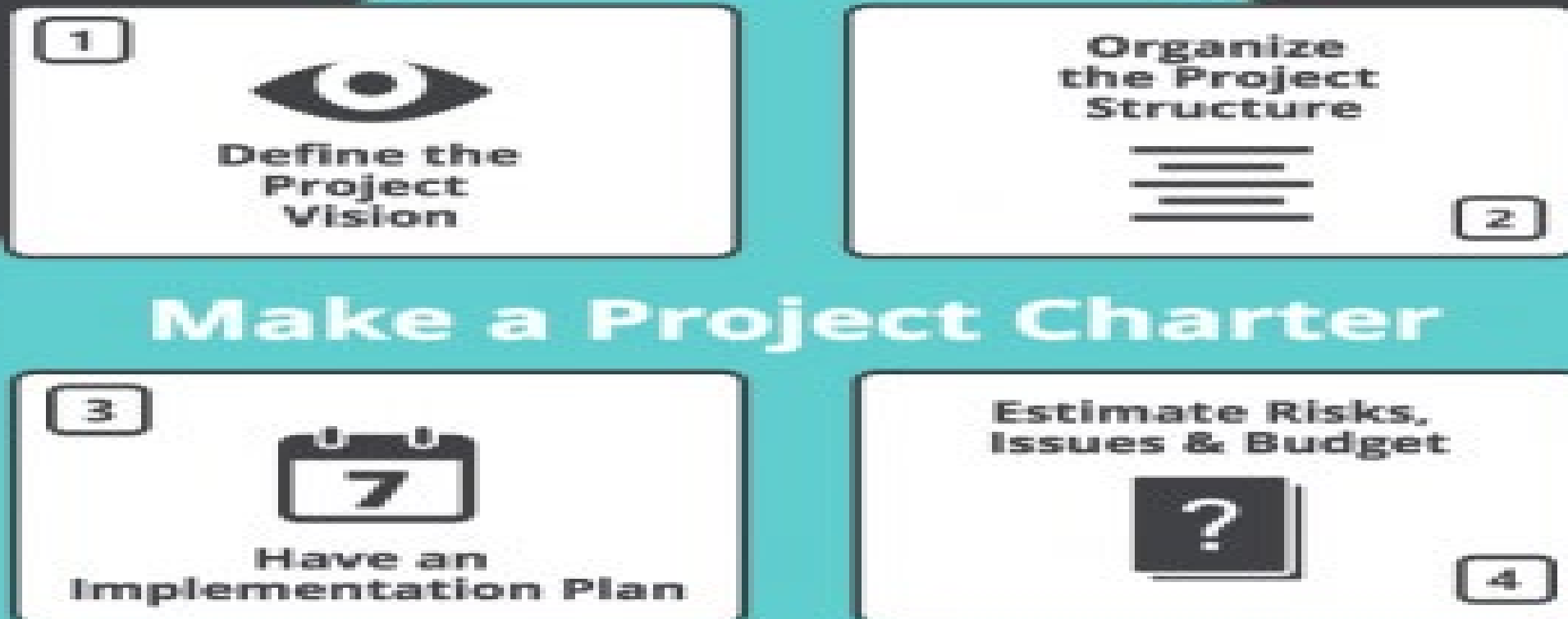


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V-How to Develop a Project Charter?

V-1- Steps needed to build a Project Charter

Typically, a Charter has four basic steps



V-How to Develop a Project Charter?

1. Determine the Project Vision

Explain why the project is needed.

Determine the **project scope**, **major deliverables**, and **the project vision**.

3. 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.

2. 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.

4. List the Risks and Issues

Identify risks, dangers, premises, constraints, and issues.

V-How to Develop a Project Charter?

This Charter can be extended to 8 steps:

Step 1

1. Identify the Project Vision

Determine the project scope, major deliverables, and the objectives. Explain why the project is needed.

Scope:

Objectives:

Deliverables:

Step 2

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.

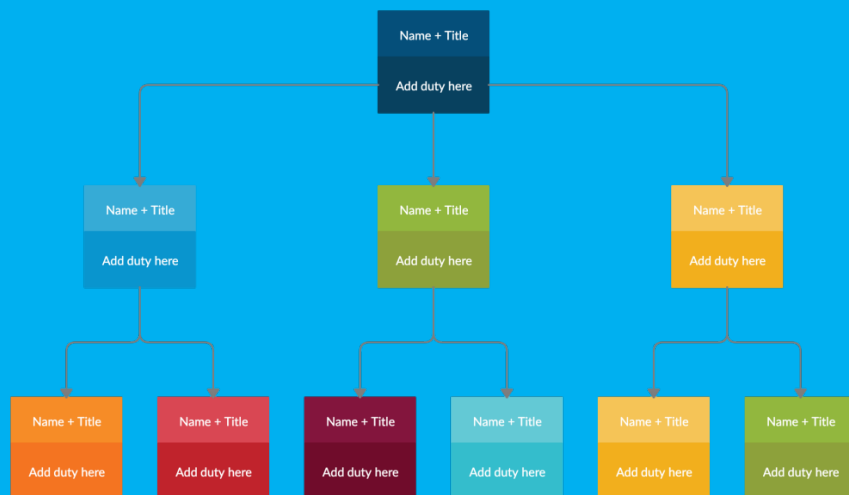
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V-How to Develop a Project Charter?

Step 3

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

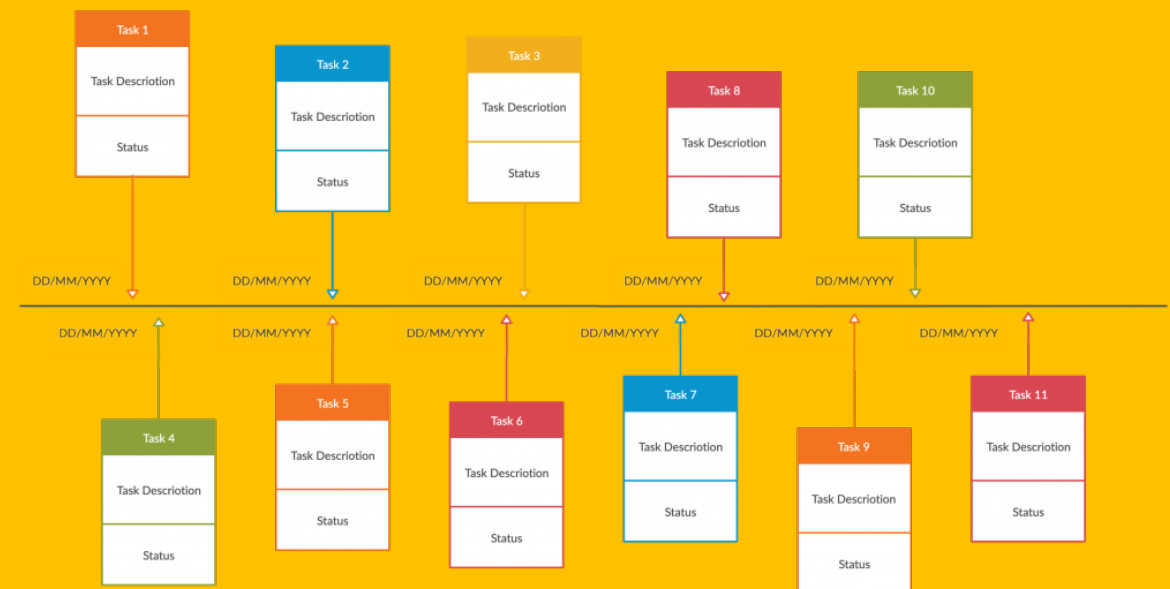
Plan the activity lists to be completed and include major phases, project milestones, and deliverables while creating an implementation plan.



Step 4

4. Define Project Milestones = List the Risks and Issues

Identify risks, dangers, premises, constraints, and issues.



V-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.

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

[illegible]

V-How to Develop a Project Charter?

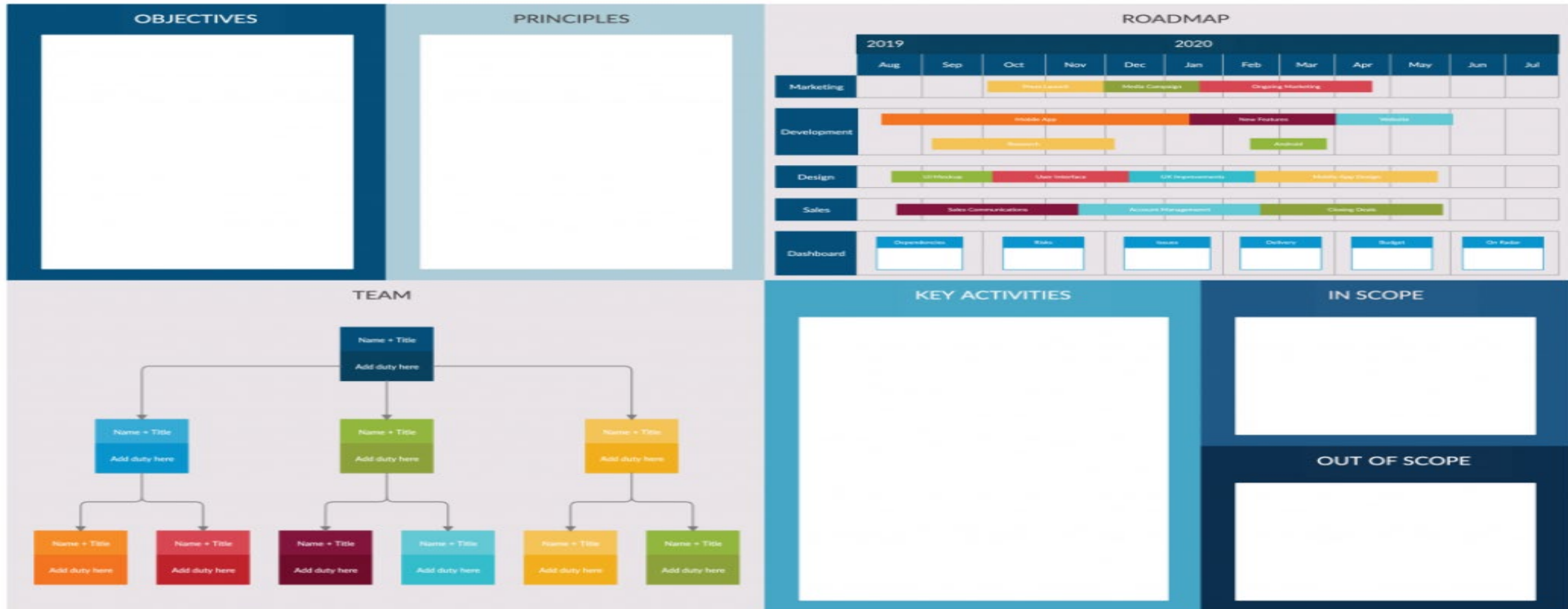
V-2- Visualizing the Project Charter

- 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.

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V-How to Develop a Project Charter?

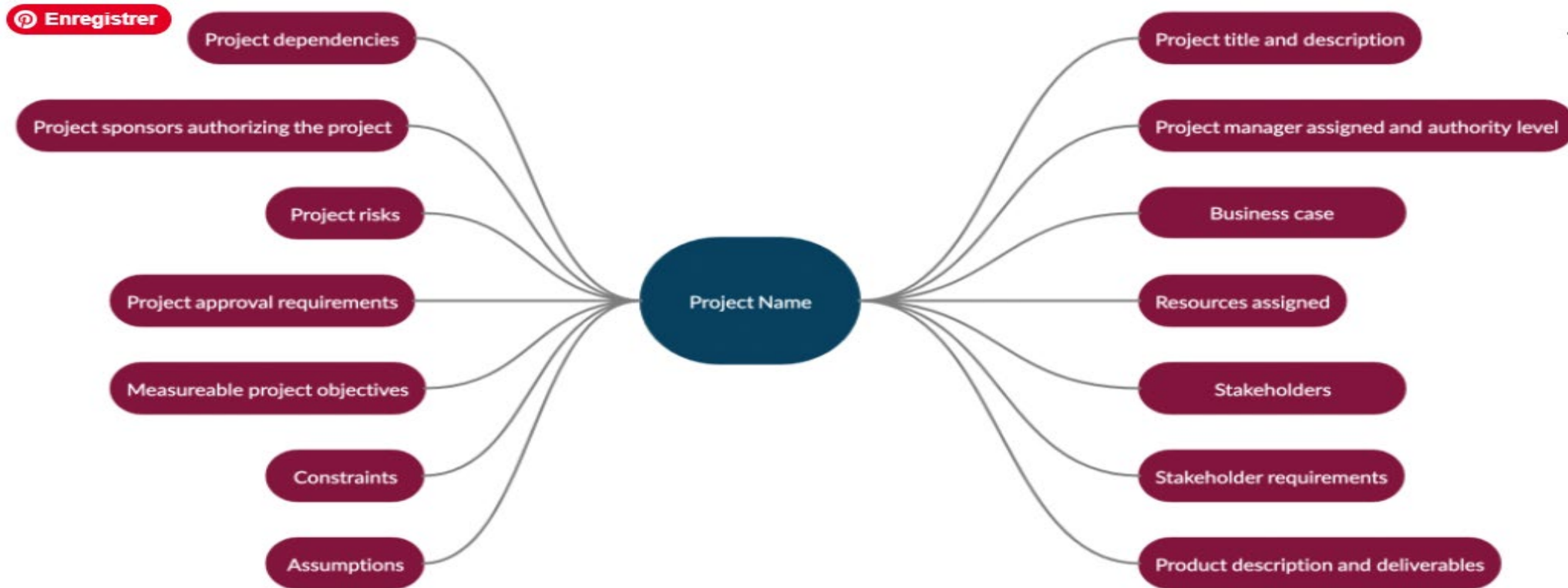
Template 1



Lecture 3

V-How to Develop a Project Charter?

Template 2



Project Charter Example

Lecture 3

V-How to Develop a Project Charter?

Template 3

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	

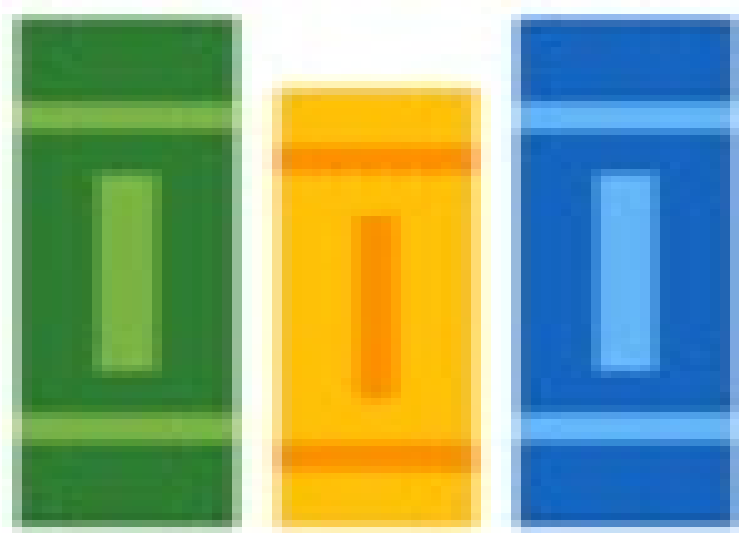
One Page Project Charter

V-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 deliverables?</i>

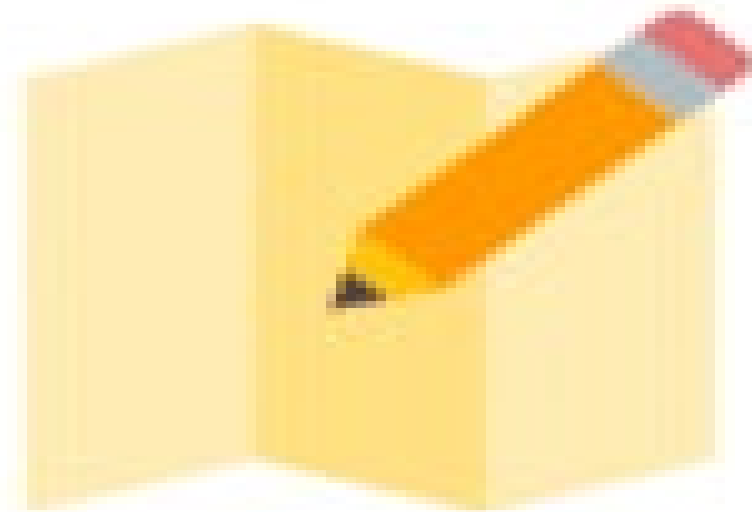
SUMMARY

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 notebook. A bright yellow rectangular banner is positioned on the left side of the desk, featuring the word 'SUMMARY' in white, bold, sans-serif capital letters.



What is a Project Charter?

Tips to Create
a Good Project
Charter



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.



Differences between...

- Project Charter

- Project purpose or justification
- Measurable project objectives
- High-level requirements
- High-level project description
- High-level risks
- Summary milestone schedule
- Summary budget
- Stakeholder list
- Project approval requirements
- Assigned project manager
- Name of sponsor

- Project Scope Statement

- Project scope description
- Acceptance criteria
- Project deliverables
- Project exclusions
- Project constraints
- Project assumptions

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?

Idea

Vision

SUCCESS

Teamwork



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

Thank
you! 