Project charter template

The filled-in values are an illustrative example (a help center relaunch made up by us) and the small notes say what to write. You'll replace both before it's sent for signature.

Grey italic text is an example. Replace it with your own content.

1. PROJECT OVERVIEW

Project name *A short name people will use in meetings*	*Customer help center relaunch*
Project manager *The person accountable for delivery: a named person, not a team*	*Support operations lead (named person)*
Sponsor *The person who approves the charter and owns the budget decision*	*Head of Customer Support*
Version and date *Raise the version whenever it's re-signed*	*Version 1, draft for sponsor review*
Links *Business case, intake request, project plan once it exists*	*Business case, support ticket report*

2. PURPOSE AND OBJECTIVES

Purpose *Why the project exists, in two or three sentences*	*Customers can't find answers in the help center and open tickets instead, so support answers the same questions every week. The project replaces the structure and the most-used articles.*
Objective 1 *SMART: a measure and a date*	*Reduce repeat tickets on the ten most common topics by the end of the second quarter, against a baseline measured in the first two weeks*
Objective 2 *SMART: a measure and a date*	*Rewrite the articles behind those ten topics to a single format by the end of week eight*
Objective 3 *Two to four objectives in total*	*Hand the help center over to the support team with an owner for every article by the end of week ten*

3. SCOPE AND DELIVERABLES

In scope *What the project will deliver*	*New navigation, search settings, rewritten articles for the ten topics, content guidelines*
Out of scope *What it won't deliver, so nobody assumes it*	*Translation into other languages, a new ticketing system, product documentation for developers*
Deliverables *Concrete outputs, each one checkable*	*Published help center, content guidelines, handover to the support team*

4. MILESTONES

Milestone	Target	How the sponsor checks it
Baseline measured	*End of week two*	*Repeat-ticket count per topic shared with the sponsor*
Structure approved	*Before rewriting starts*	*Sponsor's signed off the new navigation*
Articles for the ten topics rewritten	*End of week eight*	*Articles published in the single format*
Search live	*Before handover*	*Search settings switched on in production*
Handover accepted	*End of week ten*	*Every article has a named owner in support*

5. STAKEHOLDERS AND ROLES

Who	Role in the project	What they need from it
Sponsor (head of customer support)	*Approves the charter, decides on scope or date changes*	*Fewer repeat tickets*
Support leads	*Review answers for accuracy*	*Articles they can send to customers*
Legal	*Approves articles on refunds or data handling*	*Correct policy wording*
Marketing	*Approves tone and branding*	*Consistent brand voice*
Project team (writers, designer, developer)	*Do the work; the project manager leads*	*Clear scope and quick reviews*

6. BUDGET AND RESOURCES

Budget *A range or a cap, not a cost plan*	*Budget cap set by the sponsor*
People and tools *Who's needed, and for how long*	*Two writers for six weeks, one designer, one developer for search*

7. RISKS

Risk	Owner	First response
Subject experts are slow to review	*Project manager*	*Book review slots with support leads at kickoff, so they're not squeezed later*

Risk	Owner	First response
Search settings don't improve results	*Developer*	*Test search on the ten topics before it's launched*
Support leads are busy during a product launch	*Sponsor*	*Agree review dates around the launch calendar*

8. ASSUMPTIONS AND CONSTRAINTS

Assumptions *What you're counting on*	*Support leads can review within three working days*
Constraints *What limits you: dates, budget, people you can't get*	*Launch before the autumn campaign*

9. SUCCESS CRITERIA

Success criteria *How you'll know it worked after delivery*	*Fewer repeat tickets on the ten topics against the baseline, and a rating on the rewritten articles above a target the sponsor sets at the start*

10. APPROVAL

Role	Name	Signature	Date
Sponsor	*Head of Customer Support*		
Project manager	*Support operations lead*		