PROJECT CHARTER / INSERT PROJECT NAME HERE

DELETE THIS SECTION WHEN BUILDING A REAL PROJECT CHARTER: Please note the word project charter is used loosely and is extremely valuable to complete for any work effort where one or more people will be involved. It is not only for “projects” in a traditional sense, but is important to do even if it is a long-term work effort not a discrete and separate project. Remember – This is not just completed by the project leader. Instead it is completed as a team with all project team members.

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| WHAT + WHY | What’s the project all about + why? |
| GOALS | What goals do you have for this project?  This may include financial goals as well as other goals that are less tangible.  E.g., Everyone will be getting along throughout the project. :) Sign XXX people up for the program. Have ZERO refund requests/errors. Etc. |
| MILESTONES | What are the big milestones for this project? What needs to be completed when, by whom? This is a small space for all of that info, I know! It’s intentional. These are the top level milestones. Subtasks for each milestone can be tracked outside of this charter in a spreadsheet or project management tool. |
| WHO | Who are the key stakeholders on this project AND what role will they play (e.g., project lead, assistant, manager, customer service, web support, etc)? |
| HOW | How will the team work together to accomplish said goals?  E.g., Will the team meet regularly? How will the team communicate if issues arise? Text? Cell? Can people handle issues on their own or does the team need to regroup for certain things? |
| RISKS | What issues or problems may come up on this project? How will they be addressed (scenario planning)? |
| AGREEMENT | Each person who is involved in executing on this project should agree on this project charter. Ideally people will sign, if you are not in person, leverage something like HelloSign.com for signatures.  NAME:: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIG:: \_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE::\_\_\_\_\_\_\_\_\_  NAME:: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIG:: \_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE::\_\_\_\_\_\_\_\_\_  NAME:: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIG:: \_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE::\_\_\_\_\_\_\_\_\_ |