**PROJECT CHARTER BUSINESS CASE**

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| **GENERAL PROJECT INFORMATION** |  |  |  |
| **PROJECT NAME** |   | **IMPORTANT REMINDER**A narrative written charter must be circulated and signed by the project sponsors. You can attach a completed version of this template to your narrative written charter in an effort to keep it short and concise. Please make sure you meet with the project team and sponsors before completing this template. Much of the information required will need to come from a discussion with team members and sponsors.

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| **PROJECT SPONSOR** |   |  |  |   |
| **PROJECT MANAGER** |   |  |  |   |
| **EMAIL ADDRESS** |   |  |  |   |
| **PHONE NUMBER** |   |  |  |   |
| **ORGANIZATIONAL UNIT** |   |  |  |   |
| **PROCESS IMPACTED** |   |  |  |   |
| **EXPECTED START DATE** |   |  |  |   |
| **EXPECTED COMPLETION DATE** |   |  |  |   |
| **EXPECTED SAVINGS** |   |  |  |   |
| **ESTIMATED COSTS** |   |  |  |   |
| **DESCRIBE THE PROBLEM OR ISSUE, GOALS, OBJECTIVES, AND DELIVERABLES OF THIS PROJECT** |
| **PROBLEM OR ISSUE** |   |
| **PURPOSE OF PROJECT** |   |
| **BUSINESS CASE** |   |
| **GOALS / METRICS** |   |
| **EXPECTED DELIVERABLES** |   |
| **DEFINE THE PROJECT SCOPE AND SCHEDULE** |  |  |  |
| **WITHIN SCOPE** |   |
| **OUTSIDE OF SCOPE** |   |
| **TENTATIVE SCHEDULE** | **KEY MILESTONE** |  **START** |  | **COMPLETE** |
|  | Form Project Team / Preliminary Review / Scope |   |   |   |
|  | Finalize Project Plan / Charter / Kick Off |   |   |   |
|  | Define Phase |   |   |   |
|  | Measurement Phase |   |   |   |
|  | Analysis Phase |   |   |   |
|  | Improvement Phase |   |   |   |
|  | Control Phase |   |   |   |
|  | Project Summary Report and Close Out |   |   |   |
|  |   |   |   |   |
|  |   |   |   |   |
|  |   |   |   |   |
| **DEFINE THE PROJECT RESOURCES AND COSTS** |  |  |  |
| **PROJECT TEAM** |   |
| **SUPPORT RESOURCES** |   |
| **SPECIAL NEEDS** |   |
|  |  |  |  |  |
| **COST TYPE** | **VENDOR / LABOR NAMES** | **RATE** | **QTY** | **AMOUNT** |
| **LABOR** |   |   |   |   |
| **LABOR** |   |   |   |   |
| **LABOR** |   |   |   |   |
| **LABOR** |   |   |   |   |
| **LABOR** |   |   |   |   |
| **MISCELLANEOUS** |   |   |   |   |
|  |   | **TOTAL COSTS** |   |   |
| **DEFINE THE PROJECT BENEFITS AND 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, CONSTRAINTS, AND ASSUMPTIONS** |  |  |  |
| **RISKS** |   |
| **CONSTRAINTS** |   |
| **ASSUMPTIONS** |   |
|  |   |   |   |   |
| Prepared by: |   | Date: |   |   |

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