

PROJECT DEFINITION TEMPLATE

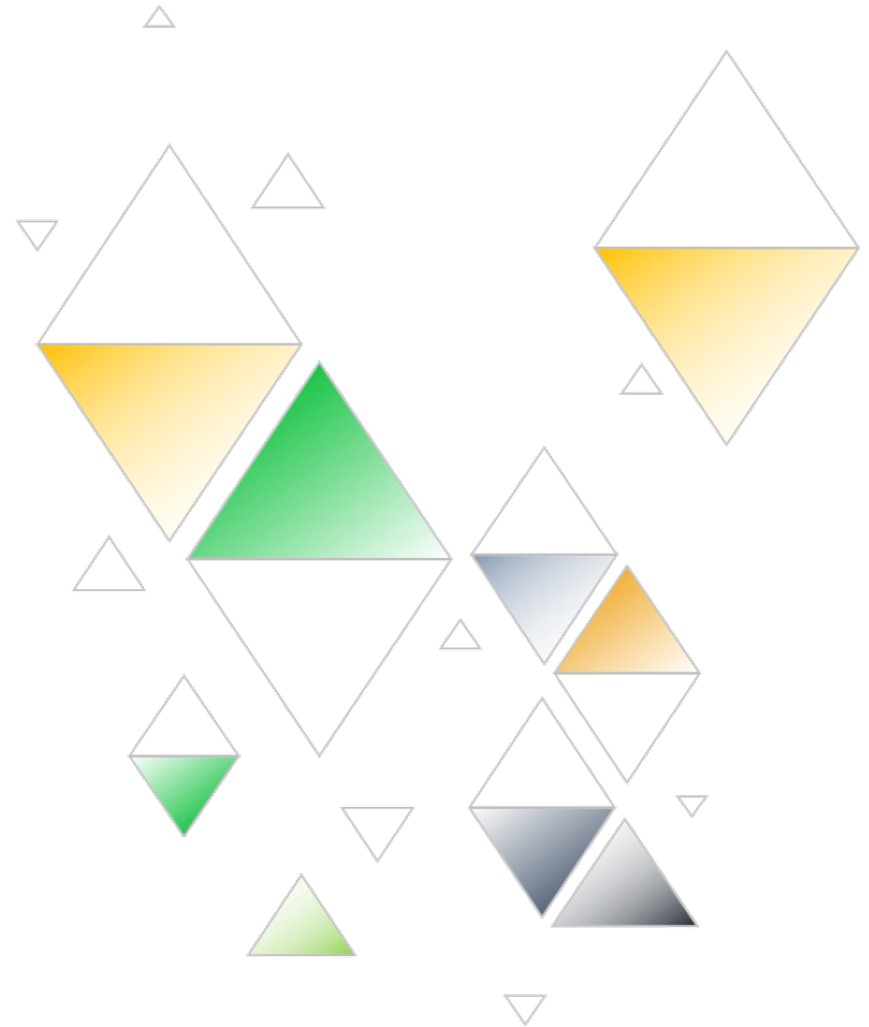
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Template begins on page 2.

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.



PROJECT DEFINITION TEMPLATE

GENERAL PROJECT INFORMATION

PROJECT NAME

PROJECT MANAGER

PROJECT SPONSOR

| | | |
|--|--|--|
| | | |
|--|--|--|

EMAIL

PHONE

ORGANIZATIONAL UNIT

| | | |
|--|--|--|
| | | |
|--|--|--|

GREEN BELTS ASSIGNED

EXPECTED START DATE

EXPECTED COMPLETION DATE

| | | |
|--|--|--|
| | | |
|--|--|--|

BLACK BELTS ASSIGNED

EXPECTED SAVINGS

ESTIMATED COSTS

| | | |
|--|--|--|
| | | |
|--|--|--|

PROJECT OVERVIEW

| | |
|-----------------------|--|
| PROBLEM OR ISSUE | |
| PURPOSE OF PROJECT | |
| BUSINESS CASE | |
| GOALS / METRICS | |
| EXPECTED DELIVERABLES | |

PROJECT SCOPE

| | |
|------------------|--|
| WITHIN SCOPE | |
| OUTSIDE OF SCOPE | |

TENTATIVE SCHEDULE

| KEY MILESTONE | START | FINISH |
|--|-------|--------|
| 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 | | |
| | | |
| | | |
| | | |

RESOURCES

| | |
|-------------------|--|
| PROJECT TEAM | |
| SUPPORT RESOURCES | |
| SPECIAL NEEDS | |

COSTS

| COST TYPE | VENDOR / LABOR NAMES | RATE | QTY | AMOUNT |
|---------------|----------------------|------|-----|--------|
| Labor | | | | |
| Labor | | | | |
| Labor | | | | |
| Labor | | | | |
| Labor | | | | |
| Supplies | | | | |
| Miscellaneous | | | | |
| TOTAL COSTS | | | | |

BENEFITS AND CUSTOMERS

| | |
|-------------------|--|
| PROCESS OWNER | |
| KEY STAKEHOLDERS | |
| FINAL CUSTOMER | |
| EXPECTED BENEFITS | |

| TYPE OF BENEFIT | BASIS OF ESTIMATE | ESTIMATED BENEFIT AMOUNT |
|----------------------------|-------------------|--------------------------|
| Specific Cost Savings | | |
| Enhanced Revenues | | |
| Higher Productivity (Soft) | | |
| Improved Compliance | | |
| Better Decision Making | | |
| Less Maintenance | | |
| Other Costs Avoided | | |
| TOTAL BENEFIT | | |

RISKS, CONSTRAINTS, AND ASSUMPTIONS

| | |
|-------------|--|
| RISKS | |
| CONSTRAINTS | |
| ASSUMPTIONS | |

PREPARED BY

TITLE

DATE

| | | |
|--|--|--|
| | | |
|--|--|--|



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