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ACME CORPORATION

ACME EUROPE UPGRADE TO CXS V12

ACME_UPGCXSV12_038_CONS

SAMPLE PROJECT CHARTER

VERSION 1.0

18/08/2021

SAMPLE PROJECT CHARTER

DOCUMENT CONTROL

DOCUMENT INFORMATION

	Information
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SAMPLE PROJECT CHARTER

INTRODUCTION

AComPany Ltd welcomes the opportunity to upgrade AComPany Ltd products at ACME. The Project Charter documents the business objectives, critical success factors, quality criteria, roles and responsibilities for the upgrade project. The Charter builds on discussions conducted between AComPany Ltd and ACME. It increases the probability of success by forming a sound basis for managing the project and setting clear expectations. The upgrade delivery phase will start once ACME and ACOMPANY LTD sign off the Charter and the Charter will form the basis for tracking progress and measuring success.

PROJECT OVERVIEW

ACME has been a AComPany Ltd customer since April 2010. Over the past 10 years, ACME has expanded its usage of the AComPany Ltd solution suite into its call centre operation and various countries across Europe. The plan is to continue the usage and growth of AComPany Ltd's CXS Product into Africa. ACME has recently purchased additional language packs to enable this expansion. This will enable ACME to provide local support to African countries in their own language.

ACME has requested AComPany Ltd provide consulting services to assist with an upgrade of their CXS software. This upgrade will pave the way for ACME to deploy the additional languages.

PROJECT SCOPE

BUSINESS OBJECTIVES

There are two key objectives of the Upgrade project:

1. To upgrade to CXS v12.
2. To streamline the system and use the new functionality in v12 so that ACME can take on more of day-to-day administration and reporting without relying on AComPany Ltd.

HIGH LEVEL PROJECT SCOPE

The project [scope](#) defines the sum of all products and services to be provided by the project. It is a basis for making future project decisions and it ensures a common understanding amongst project stakeholders.

The ACME upgrade project will consist of 4 phases: discovery, build, testing and training. Please refer to the information below for additional [scope](#) details. Any changes to this [scope](#) must be handled through the change management process. Please refer to the Change Management section at the end of this document for further details and a sample [Change Request request](#) form.

Business objective	Deliverables	Measure of success
To upgrade to v12.	<ul style="list-style-type: none">• 23 customizations on current site re-built for upgraded site.• Like for like transfer of end user pages from current site to upgrade site (new v12 functionality may provide potential improvements and when agreed with ACME these may result in small changes to the upgraded pages).	ACME sign-off of v12 upgrade following UAT. Successful launch on 03/03/2022.

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	<ul style="list-style-type: none"> • Like for like configuration of workspaces, user accounts and account profiles 	
To upgrade to v12 to enable the Marketing Console to function fully.	As above.	As above
To streamline the system and utilize the new functionality in v12 so that ACME can take on more of day-to-day administration and reporting without relying on <i>ACOMPANY LTD</i> support.	<ul style="list-style-type: none"> • Upgrade to v12 to use customer cpanel. • Review of rule base removing redundant rules and documenting remaining rules. • Improved OneClick facility for call centre use. • Training for call centre trainers and ACME agent trainers. 	<p>Completion of training.</p> <p>ACME system administrator able to create:</p> <ul style="list-style-type: none"> - reports - rules and - announcements

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DELIVERABLE [SCOPE](#) DEFINITIONS

DEVELOPMENT AND CONFIGURATION

The table below sets in detail the customizations and configuration items that will need to be 're-built/transferred' to the v12 upgraded site. Each of the items below is defined in more detail in the following documents: ACME Europe Page and Widget Specifications, ACME Contact Rule Base, ACME Incident Rule Base, ACME Answers Rule Base, ACME Configuration document.

ID	Item name	Description	Area of ACompany Ltd solution	Type of deliverable
WP001a	Customer cpanel (cpanel)	cpanel is used to store configuration settings and custom message base entries.	n/a	Development environment
WP007 WP008	Serial Number Search (SNS) and Service Centre Lookup	The SNS customisation is a custom tab in the console that allows ACME to manage the product registration data stored in a custom table within the database. A modified copy of the SNS customisation is used as the Service Centre Lookup. The changes being that the displayed columns are different and only Service Centre contacts are shown.	Admin console	Customisation
CG001	OneClick	This customisation was written to allow agents to easily create new Tickets (and where necessary new contacts) from phone calls, where the standard console functionality was not streamlined enough.	Admin console	Configuration
CG002	Email to new customer	Welcome email to new customers. Customisation replaced with V12 standard functionality using business rules.	Admin console	Configuration

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ID	Item name	Description	Area of <i>AComPany Ltd</i> solution	Type of deliverable
CG003	Navigation sets & profiles	Re-creation of navigation sets, profile, staff accounts and workspaces on the upgrade site.	Admin console	Configuration
WP001b	CPANEL View	CPANEL View provides programmatic access to <i>AComPany Ltd</i> views for the user of other customisations	n/a	Development environment
WP010-003 (interfaces) WP011-002 (locales)	Product Registration (NRP)	This customisation lets ACME customers register their products on the ACME website and stores the details in a custom table within the database. Customers can add, modify and delete their registrations. Upon registration of a product the SLA instances assigned to a contact may be changed, depending upon which products have been registered. This also includes the EN-EL3 product recall customisation.	End user pages	Customisation
n/a	CPANEL Proxy	This allows the <i>AComPany Ltd</i> server to retrieve files over HTTP from external websites and serve them as if they were from the <i>AComPany Ltd</i> server, acting as a proxy. The proxied files are cached on the <i>AComPany Ltd</i> system.		Development environment
n/a	ACME Voucher System (NVS)	Activated by an external event, this will create a PDF file containing data from the contact record, attach it to a new incident in the <i>AComPany Ltd</i> system, and email it to the contact.		Can be migrated without modification
WP009	Maintenance Splash Pages	A custom page that is shown to the end user when the site is in maintenance mode.	Admin console	Customisation
WP005	External Events	These external events are not covered elsewhere in this document. Each is described below.	Admin console	Customisation

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ID	Item name	Description	Area of ACompany Ltd solution	Type of deliverable
WP003	Knowledge import/Export	Exports FAQs to XML files, sftp them to Babel for translation and sends a notification email when the ftp process is complete. Imports answers from XML files and updates database with the new details.	Admin console	Customisation
n/a	Model Rule Administration	Allows ACME to administer the serial number rules for each product.	Admin console	Can be migrated without modification
WP-001	Serial Number Checker	Checks serial numbers for specific ranges and redirects users if a match is found.	n/a	n/a
WP006	Custom End User Emails	The emails sent to end users were redesigned at the same time as the support site.	Admin console	Customisation
WP0027	Login page for marketing	Provides template files for use by marketing as alternate login and registration forms. By modifying the HTML in the templates the forms can be made to work for any look and feel. Also provides a file upload facility for contact attachments.	Admin console	Customisation
WP0028	Subscription page for marketing	Provides template files for use by marketing as alternate login and registration forms. By modifying the HTML in the templates, the forms can be made to work for any look and feel. Also provides a file upload facility for contact attachments.	Admin console	Customisation

TRAINING [SCOPE](#)

The following training will be delivered as part of the project.

Training	Venue	No days	Estimated dates
Training for key ACME agents to carry out UAT.	ACOMPANY LTD ATown	2	13 – 14 Oct 2021
Customised Smart Conversion course for ACME ETO team.	ACOMPANY LTD ATown	1	Wkc 13 Oct 2021
Training for call centre managers	Local call centres	5	Dec 2021
Train the trainer course for ACME agents including country SME.	Local call centres	5	End Feb 2022

EXCLUSIONS

The following elements are specifically excluded from this project:

1. Upgrading the usage of the XML API is outside ACOMPANY LTD and under the responsibility of the customer.
2. Analysis, documentation, or configuration of security outside of the AComPany Ltd application.
3. Changes to the end user pages or admin console that improve on or are additional to that provided in the current AComPany Ltd version (CXS-7).
4. Any outstanding deliverables under contract IDs:
 - ACME_R001_M_Registration
 - Interim resource supply (1 month of Developer time)
 - ACME_Health Score SOW_071020
6. Database, operating system and network configuration and/or troubleshooting. This includes, but is not limited to:

Database Replication, Optimization or Partitions	Router/Switch troubleshooting
DNS issues	SSL configuration
Internet Connectivity	TCP/IP configuration
Network Appliance setup/troubleshooting	Technical environment operations
Network maintenance and backup	Web Server set-up and troubleshooting
Remote Access Customer/server configuration	Windows and/or any other OS Installation

SAMPLE PROJECT CHARTER

(Citrix, Terminal server etc.)	
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DEFINITION OF CODE FREEZE

To enable the upgrade to take place a freeze will be placed on any changes to the current live site. The freeze can only be broken/suspended with steering group approval.

The following changes fall under the code freeze:

- Creation of custom fields on the admin console. Please note this excludes addition or deletion of products and categories and addition or deletion of items on customizable menus.
- Changes to any tables that have custom field capabilities e.g., Tickets, answers, contacts, tasks and opportunities (this excludes contact uploads).
- Any new integration/external event including API calls (this includes product uploads).
- Any code to the end user pages (excluding text changes).

The following changes fall outside of the code freeze and can be made without referring to the programme team:

- Deletion or addition of products and categories.
- Addition or deletion of items on a customizable menu.

The following changes/requests can be completed during the code freeze provided the process stated is followed:

Items	Process for ACME to follow	Process for ACOMPANY LTD to follow
Creation of a new report	Submit request on a report request form	Admin to send copy of request to Consultant.
Text changes on the end user pages (CPANEL/message bases)	Make change and email ACOMPANY LTD with the change.	Log change and update development site with change before cutting over.
Changes to rules	Request change via OSA	OSA informs Consultant who will update the rule base document.
Uploads of contact data	Use contact uploader or request OSA time in the usual way.	OSA to inform Consultant if upload involves any bypass of serial validation rules.
Essential changes to configuration settings	Contact Project Manager with details.	Programme team to assess impact and report back with impact on time and cost (if any).

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Items	Process for ACME to follow	Process for <i>ACOMPANY LTD</i> to follow
Removing or creating mailboxes.	Inform Consultant of action taken.	Consultant to record.

If in doubt, contact the ACME Programme Team [Project Manager](mailto:pmanager@acompanyltd.com) pmanager@acompanyltd.com.

The following [change requests](#) are on hold until after the upgrade launch date.

Item	Description	Service/marketing
Product Upload	Creation of an import interface or an API to upload products and run serial number validation.	Marketing
Manual Print on Demand	Provides the facility for ACME to import a file with dates into Tickets within the <i>ACompany Ltd</i> system. Expected to be put live after receiving more data from ACME and undergoing additional testing.	Service

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DEPENDENCIES

The following work/projects impact on the upgrade.

Item	Description	Dependency	Deadline for resolution	Impact if deadlines not met
ACME Subscription Page	Customisation	Needs to be completed and to be tested on the Customer cpanel before Cut Over.	Completion on LIVE by 05/09/2021 Migrated to Customer cpanel by Nov 21	Customisation will not be in place when the upgraded site goes live.
Login page for marketing	Customisation	Needs to be completed and to be tested on the Customer cpanel before Cut Over.	Completion on LIVE by 05/09/2021 Migrated to Customer cpanel by Nov 21	Customisation will not be in place when the upgraded site goes live.
Data Clean-up	Export of contact data to 3 rd party, creation of custom fields and import of data back into RNT.	Custom fields need to be created before the final upgrade test site is created on 05/09/2021.	Completion on LIVE by 05/09/2021	Custom fields on LIVE will be added after upgrade test site is created. This will force the re-creation of the test site and the loss of all config work to date.
Fwd	New registrants on Fwd are transferred via API <i>ACOMPANY LTD</i> LIVE.	API needs to be completed by 05/09/2021.	Completion on LIVE by 05/09/2021	Unknown programme team to assess.
ACME Pro Subscription	Customisation about to launch.	Rollout must be completed by end August.	End Aug 2021.	Forced re-creation of test site and loss of config work.

ASSUMPTIONS

PROJECT CHARTER [ASSUMPTIONS](#):

1. This document will be based on discussions conducted between AComPany Ltd and ACME.
2. The AComPany Ltd Team and ACME will agree to the contents of this document prior to moving forward with the project.
3. Project Charter will provide reference throughout the project to ensure the work is meeting stated objective and to resolve project issues

PROJECT PLAN [ASSUMPTIONS](#):

1. The final list of [tasks](#) to be performed for this Statement of Work will be defined in the final project plan and approved by ACME.
2. The project plan will detail the timeline for implementing the required AComPany Ltd CXS features and functions.

DEVELOPMENT AND TESTING

1. The [Project Sponsor](#) will ensure sufficient resource is available to carry out system and user acceptance testing.
2. The [Project Sponsor](#) will sign-off or delegate the sign-off of all UAT documents e.g., test scripts.
3. During the project, a 'code freeze' will be implemented. This means that requests for customizations or any Tickets that require a AComPany Ltd engineer will be frozen until the upgrade is completed. If business critical issues arise, they will be handled through change control.

TRAINING

1. Onsite training must be delivered over the course of 1 full week (both sessions). AComPany Ltd does not support anything less than 3 days onsite.
2. The Customer will provide training equipment (e.g., laptops and/or desktops) for all attendees.
3. The Customer's equipment will be configured per AComPany Ltd specifications (specifications to be provided by AComPany Ltd) and will have tested internet connectivity. Customer will have an IT resource available to troubleshoot issues if necessary.
4. Customer testing of their training environment will be completed prior to the training engagement and confirmed by AComPany Ltd upon arrival.
5. The Customer will provide a single point of contact to assist AComPany Ltd in the coordination of these education services.
6. The Customer will make all the necessary arrangements for their staff and the Call Centre agents attending training. Including: booking the training hubs and call centre venue, managing attendance and making travel arrangements.

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CUSTOMER FURNISHED PROPERTY & SERVICES

ACME will AComPany Ltd staff the following facilities while they are working in ACME offices:

1. Telephone service for local and long-distance calls that pertain to supporting the project.
2. Internet Access
3. Work facilities to perform the work related to this project.
4. Access to existing systems as they apply during the implementation, testing, and rollout of the AComPany Ltd Applications.

WORKSTATION COMPLIANCE

The Customer is responsible for workstation compliance and/or pre-installation activities.

CRITICAL PROJECT DATES

The following highlights the project's targeted milestone dates associated with the release of the ACOMPANY LTD solution. This will serve as an input to the overall Project Plan for the engagement.

Date	Description
15/07/2021	Project Kick-Off
Mid-August 2021	Discovery Phase
End Nov 2021	Customisation completed incl. testing
Beginning Dec 2021	Configuration completed incl. testing
Mid Dec 2021	Admin console UAT & training
Jan 2022	Final user Acceptance Testing
Mid – end Feb 2022	Training
03/03/2022	Launch
16/03/2022	Project Completion and post project report
03/04/2022	Warm handover to Support

CRITICAL SUCCESS FACTORS

The following lists the critical success factors for this engagement. These elements must be in place for the engagement to be successful.

1. Designated client resources will be available to serve as Subject Matter Experts (SMEs) and provide necessary information to support project business requirements, technical information and any other material that is required for project success.
2. The roll-out is constrained by a very tight timeframe and therefore extensive project coordination is required.
3. Management will make adoption and use of the AComPany Ltd application part of daily business processes during the Adoption phase.
4. Executive Management and Sponsors will support all facets of the project and following the go-live of the application.
5. Define all internal and external project-related roles, and designate one person to assume ownership of coordination, execution and measurement of campaign launches.
6. Internal and external parties must be available for training on applicable portions of product.
7. Data architecture for contact updates, imports and exports must be finalized for Customer Support and Marketing use.
8. Define number and types of campaign components to ensure adequate time allocation for configuration and launch.
9. Define campaign measurement reporting to ensure project goals and marketing efforts can be measured effectively.
10. On-site training is constrained by a short time frame, so extensive project coordination is required.

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RISK REGISTER

Risk No.	Date Identified	Description	Probability	Impact	Criticality	Preventative Actions	Contingent Actions	Owner	Status
2	17/06/2021	ACME are currently missing a Project Manager for the <i>ACOMPANY LTD</i> upgrade. There is a risk that the commitment in terms of resources and time will not be fully understood, planned or coordinated without this role.	M	M	Medium	Raise with T Customer. If not suitable resource internally at ACME suggest contractor.	Consider using <i>ACOMPANY LTD</i> PM hours to provide extra support - unlikely to have capacity in RNT. Consider more of TM's time on site at ACME.	Project Manager	Open
4	17/06/2021	ACME have paid for a Developer/consultant for 1 month. Any outstanding work needs to be completed before the code freeze otherwise there is a risk that code changes will divert programme team resources and potentially delay the upgrade.	M	M	Medium	Code freeze in place from 15/21. All Tickets raised by ACME to be assessed on weekly basis at programme team meetings.	Change control process.	Project Manager	Open
5	01/07/2021	Tickets raised with <i>ACOMPANY LTD</i> sometimes include change requests . There is a risk that changes will go ahead without	L	M	Low	Low likelihood has we have close links with support. Code freeze in place from 15/21. All	Change control process.	Project Sponsor	Open

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		the programme team knowing and thus impact the upgrade.				Tickets raised by ACME to be assessed on weekly basis at programme team meetings.			
6	29/07/2021	There is a risk that code red Tickets may divert programme team resource away from the upgrade work.	L	H	Medium	Put process in place to record time spent on code red Tickets. TAM/PM to involve DMS management to help find best resource to resolve problem as quickly as possible.	Code red Tickets are unlikely, but they do need to be acted on immediately. In the event of a code red programme team resource will be diverted, but time will be carefully recorded, and the impact fed back to ACME.	Project Manager	Open
7	29/07/2021	Enhancements/ change requests on the live site.	M	H	High	Put process in place to manage enhancements and change requests . Agree governance structure to assess and approve Change Requests .	Raise change request and submit for approval to Steering Group or Programme Board. Ensure impact on time/ cost and quality clearly documented.	Project Manager	Open

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COMMUNICATION AND REPORTING PLAN

This is a high-level communication and reporting plan. The detail and communication dates will be developed during the planning phase.

Stakeholder	Role	Information requirements	Information provider
H Junior	Programme Board Member	ROI, strategic account direction, escalations, change requests	D Holder
T Customer	Project Sponsor & ACME Project Manager	Weekly reports, change requests , & ad hoc day to day contact	Project Manager
V Smith	Steering Group member, Marketing	Weekly reports, change requests , & ad hoc day to day contact.	Project Manager
W Sandon	Steering Group member, Marketing	Weekly reports, change requests , & ad hoc day to day contact.	Project Manager
D Holder (EMEA Managing Director)	Programme Board Member	Escalations, strategic account direction & change requests	V Smith/W Sandon
F Mack (Vice President Consulting services)	Programme Board Member	Weekly reports, escalations and change requests	Project Manager
L Salles (Strategic Account Director)	Steering Group member	Weekly reports, escalations and change requests	Project Manager
S French and R Stokes	Technical Account Managers	Weekly reports, escalations and change requests	Project Manager
Tbc	Customer Project Manager	Detailed project information and regular day to day contact.	Project Manager
P Downy	Developer	Detailed project information and regular day to day contact.	Project Manager
A Consultant	Consultant	Detailed project information and regular day to day contact.	Project Manager

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BUDGET

Budget The project [cost](#) and the terms and conditions are set out in the Programme team SoW. This section provides an initial estimate of AComPany Ltd's resource utilization.

Hours per month								
Year	Month	Project Manager	P Downy	A Consultant	Developer 1	Developer 2	QA	Totals
2021	July	160	184	160	0	0	0	504
2021	August	144	160	160	0	0	0	464
2021	September	176	176	176	136	136	104	904
2021	October	184	184	184	184	184	136	1056
2021	November	160	160	160	0	0	160	640
2021	December	120	168	168	0	0	120	576
2022	January	160	168	168	0	0	24	520
2022	February	160	160	160	0	0	64	544
2022	March	16	16	16	0	0	0	48
	Total	1280	1376	1352	320	320	608	5256
	Total hrs paid for	1,760	1,760	1,760	0	0	0	5,280
	Variance	480	384	408	-320	-320	-608	24

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QUALITY ASSURANCE

TESTING PLAN

The table below lists the tests that will be carried out with estimated dates.

Test type	Test description	Dates	Location	Tester(s)	Issue resolution
Unit	Code level testing e.g., elements within a page – form submission/page format.	Ongoing from Sept to Nov 21	ACOMPANY LTD ATown	Developer tbc	P Downy
Functional	End to end test of user journeys and admin workflows. e.g., product registration	Ongoing from Oct to Dec 21.	ACOMPANY LTD ATown	Call-centre supervisor	P Downy/A Consultant
	Entire system test	Mid Dec 21	ACOMPANY LTD ATown	Call-centre supervisor	P Downy/A Consultant
UAT (end to end test of user journeys by ACME)	Answer console, nav sets, profiles, workspaces	On site 13/10 – 24/10/21	ACOMPANY LTD ATown	T Customer team	A Consultant
	Marketing console	On site 13/10 – 24/10/21		T Customer marketing team	P Downy/A Consultant
	Support (Incident) console incl. OneClick	08/12 – 12/12	Amsterdam venue tbc	Call centre supervisors	A Consultant
	Admin end user pages			Call centre supervisors	P Downy
	Entire system test inc. all end user pages	Jan 22	ACME, Head office	Testing team	P Downy/A Consultant
	Country & locale UAT – Answer console - page format, copy, country rules.	03/02 to the 20/02	1 location tbc	Country SMEs	P Downy/A Consultant
	Country & locale UAT - Text comparison with LIVE and translations check on end user pages	03/02 to the 20/02	Babel	Babel	P Downy
Cut over tests	Nav sets, reports, workspaces	Cut over est. 03/03/22	ACME, Kingston upon Thames	ACOMPANY LTD programme team	ACOMPANY LTD programme team
Cut over login tests	Login by call centre managers and ACME SMEs	Cut over est. 03/03/22	Local offices	Call Centres managers and country SMEs	ACOMPANY LTD programme team

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TESTING METHOD

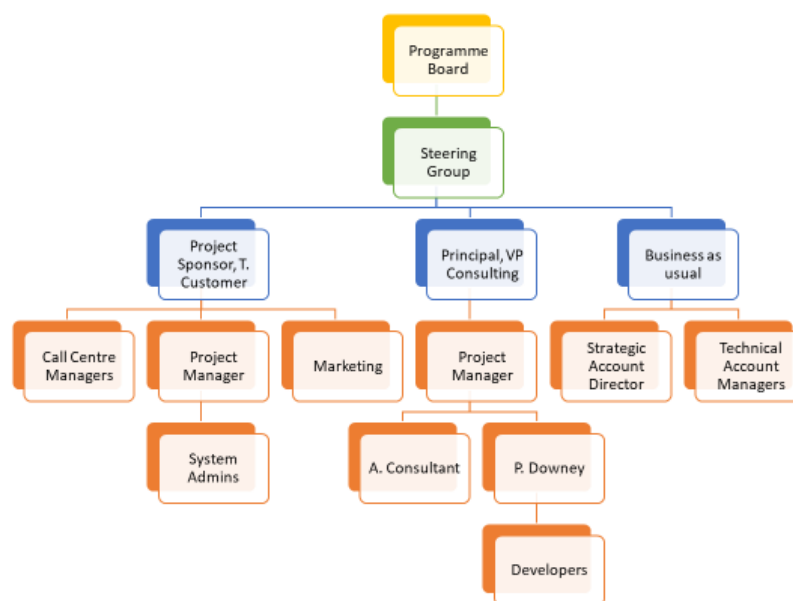
Unit and functional tests will be run following a test script written by the ACOMPANY LTD consultant and developer. Issues will be logged using issue tracking software e.g., Jira.

Pass conditions for each test will be given in the test specification. Overall quality will be measured by a like for like comparison with the LIVE site.

UAT tests will be run following test scripts based on existing business processes. End user page testing will compare the LIVE site against the upgraded site.

PROJECT GOVERNANCE

PROJECT ORGANISATION STRUCTURE



PROGRAMME BOARD

The Programme Board is responsible for the overall direction of the programme team and has the overall authority for the upgrade project. It ensures that the upgrade project and the programme team meet the business objectives defined in the SoW and it signs off the completion of the upgrade.

It is responsible for ensuring that the project gives value for money and that it remains focused on achieving its projected business benefits. The group approves all [Change Requests](#) and Exception Reports that exceed the tolerances of the Steering Group.

Membership:

H. Junior – ACME

D. Holder - AComPany Ltd

The Programme Board does not have set face to face meetings but may meet to resolve escalations or approves [Change Requests](#).

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STEERING GROUP

The Steering Group oversees the day-to-day direction and management of the programme team and the upgrade project. It reports to the Programme Board and has delegated authority from the Programme Board to approve SOWs, the Project Charter, and any [Change Requests](#) or Exception reports that fall within its time and [cost](#) tolerances. It ensures sufficient AComPany Ltd and ACME resources are in place to deliver the project and is responsible for the quality of the final product.

It is the first point for all escalations and any business-critical risks and issues. It reviews all [Change Requests](#) and Exception Reports and submits those outside its tolerances to the Programme Board with recommendations for approval or rejection.

Tolerance levels:

Timescales - delay to Launch date 5 days or less

[Cost](#) increases up to sign-off level

Membership:

- T Customer – ACME
- V. Smith – ACME
- W. Sandon - ACME
- L. Salles –AComPany Ltd

Meets: weekly

PROJECT TEAM ROLES AND RESPONSIBILITIES

AComPany Ltd – Team Roles and Responsibilities

Project Team Role and Responsibility	Staff Name	Contact Information
Strategic Account Director: Assist with additional purchasing needs and manage the account long term to ensure business needs are met. Member of the Steering Group.	L. Salles	lsalles@acompanyltd.com
Principal: Initial Consulting services Client Contact and Programme Board Member.	F. Mack	fmack@acompanyltd.com
Project Manager: Main contact during the project to facilitate, manage and lead a successful implementation. Documents requirements for all Change Requests and documents requirements for additional Statements of Work.	Project Manager	pmanager@acompanyltd.com
Consultant: Delivers onsite or remote configuration, best practices consulting and solution optimization services.	A Consultant	aconstant@acompanyltd.com
Trainer: Works closely with the <i>ACOMPANY LTD</i> Project Manager and client's training resources to deliver onsite or remote training workshops.	A Consultant	aconstant@acompanyltd.com
Developer: Works closely with <i>ACOMPANY LTD</i> Project Manager and client's technical resources to complete customization and integration projects.	P Downy	pdowny@acompanyltd.com

SAMPLE PROJECT CHARTER

Project Team Role and Responsibility	Staff Name	Contact Information
<p>Technical Account Manager (TAM): If applicable (separate SOW required), provides designated customer service in the following areas:</p> <ol style="list-style-type: none"> 1. Service Delivery – Overall responsibility for delivery assurance and escalation point for client. 2. Incident Support and Issue Resolution – Supports monitoring, support, escalation and resolution of product related inquiries. 3. Metrics and Monitoring – Utilizes system tools to proactively monitor client use of the <i>ACOMPANY LTD</i> applications, Tickets being submitted, and the contracts created within support infrastructure. <p>The TAM is also assigned to the account post-delivery of a project to strategically manage the client’s system. Member of the Steering Group.</p>	<p>S. French (Service)</p> <p>R. Stokes (Marketing)</p>	<p>sfrench@acompanyltd.com</p> <p>rstokes@acompanyltd.com</p>

ACME – Team Roles and Responsibilities

Client Team Role and Responsibility	Name and Title	Contact Information
<p>Project Sponsor: Communicates company objectives, project goals, deliverables and budget to Project Manager or entire project team. Member of the Steering Group.</p>	T Customer	tcustomer@acme.com
<p>Customer Project Manager: Coordinates the entire project team to ensure the project goals, success criteria, schedule, deliverables and results are achieved. Determines the appropriate link placement for the <i>AComPany Ltd</i> site and promotes the release of the <i>AComPany Ltd</i> application to external and internal customers.</p>	System Administrator (to be recruited)	tbc
<p>Internal Subject Matter Experts: Individuals who work within the client organization and bring a specific expertise to the project to aid in the business requirements and overall design of the proposed application (may include a Marketing Specialist, Service Agent, etc.).</p>	Representatives from Locales	tbc
<p>External Subject Matter Experts: External, third party individuals that work outside the client organization and bring a specific expertise to the project to aid in the business requirements and overall design of the proposed application (may include an Advertising Agency, Data Fulfillment House, etc.).</p>	Kahiloa Babel	sales@kahiloa.com admin@babel.com
<p>Service ACOMPANY LTD Application Owner: Ultimate owner of the <i>AComPany Ltd</i> Service application who is highly trained on the product’s features and capabilities. Responsible for gathering and entering data for the configuration.</p>	Tbc	Tbc

SAMPLE PROJECT CHARTER

Client Team Role and Responsibility	Name and Title	Contact Information
Marketing ACOMPANY LTD Application Owner: Ultimate owner of the <i>AComPany Ltd</i> Marketing application who is highly trained on the product's features and capabilities. Responsible for gathering and entering data for the configuration.	Tbc	Tbc
Webmaster: Customizes the site design and creates the link to <i>AComPany Ltd</i> application on the "launch" date.	Kahiloa	sales@kahiloa.com
Trainer: Responsible for initial and ongoing training of the staff that will use the <i>AComPany Ltd</i> application.	ACME SMEs Call Centre Managers	Direct comms through project manager
Mail Administrator: Completes all mail related tasks associated with the <i>AComPany Ltd</i> product.	Tbc mail admin External Kahiloa	Direct comms through project manager

CHANGE MANAGEMENT PROCESS

Throughout a project, new information may surface that may necessitate a change in business requirements or a change in the technical environment. These changes may result in a change in project [scope](#) and therefore estimated level of effort, project timeline or solution features. [Change Requests](#) may result in adjustments to both [schedule](#) and budget.

Any changes to the project [scope](#) will require a Change Request, which a *AComPany Ltd* [project manager](#) or designated consultant will complete. Due to the complexity of some project [Change Requests](#), *AComPany Ltd* may bill the Client for the time required to [scope](#) and estimate the requested change. The *AComPany Ltd* consultant will advise the Client of the estimate if a charge will apply.

Refer to below for a sample of the *AComPany Ltd* [Change Request](#) Form. A completed form includes the requested change, the impact on the current engagement, and the estimated resources and time to implement the Change Request. *AComPany Ltd* will submit the completed [Change Request](#) Form to the Client for review and approval.

Estimates will remain valid for a period of five (5) business days from the date of submission. If the Client does not approve the [Change Request](#) Form within the five (5) business days, and *AComPany Ltd* has not extended the period of validity in writing, the change estimate will automatically expire. Upon receipt of written approval, the *AComPany Ltd* Team will begin work on the requested change according to the agreed-upon [schedule](#).

SAMPLE PROJECT CHARTER

APPENDIX 1

SAMPLE CHANGE REQUEST

General Information

Client Name <Insert client name>
Statement of Work <Insert exact name of SOW and relevant codes>.
Client Project Manager Contact Info Name Email Phone Number
[Change Request](#) Number <Numbering convention needs to be: CO#_SOWContractID>
Contract Type Fixed Price Time & Materials

[Change Request](#) Assessment:

Date Requested:		Priority <input type="checkbox"/> Critical <input type="checkbox"/> Important <input type="checkbox"/> Desirable
Title:		
Description of Proposed Change:		
Reason for Change:		
Implications of Not Making Change:		

Status	<input type="checkbox"/> Approved <input type="checkbox"/> Rejected	Date	Approved Rejected	USCs – Hours Used	
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Title	Name	Signature	Date
ACompany Ltd Project Manager			
Client Project Manager/Sponsor			

Details

Schedule Change:	<The End Date is extended to mm/dd/yy. This adds an additional XX hours to the original estimate.>
Fee Changes:	<The original Purchase Order issued by Client under the Statement of Work, Purchase Order No. XXXXX, is hereby extended to include the estimated Fees under this Change Request. The Purchase Order amount is increased to \$XX.00.>
Description of Agreed Service and Deliverable Changes:	ACompany Ltd will provide the following additional deliverables: Deliverable 1 Deliverable 2
Terms and Conditions:	Except for the changes written above, all other terms and conditions remain the same as those stated in the Statement of Work and any preceding Change Requests .

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