**MIS 4596**

**Project Charter**

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| ***Project Name*** |  | ***Product/Process Impacted*** |  |
| ***Start Date*** |  | ***Organization/Department*** |  |
| ***Target Completion Date*** |  | ***Champion/ Sponsor*** |  |

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| **1. Project Manager** |  | Name of the PM which will also be the Client contact | | | | | | | | | | | |  |
| **2.Team Member (s)** |  | Name of other Team member(s) and their role Who is on this team? What are the specific skills/roles of each team member? | | | | | | | | | | | |  |
| **3. Project Description** |  | What problem is the team addressing? What problems do customers have? What is the purpose? | | | | | | | | | | | |  |
| **4. Project Scope** |  | What areas are inside and/or outside the work of the team? What are the boundaries (start and end points)? What specific parts of the overall problem will you focus on? | | | | | | | | | | | |  |
| 1. **Project Goal (s)**   What must the team deliver to be successful? Does the team goal link to the key performance parameters established by the sector leadership teams? What is the baseline performance? How will the goal be measured? | | | | |  |  | **Metrics** (propose specific metrics for your project, e.g., cost reduction, time reduction, customer satisfaction, etc.) | | **Baseline** | | **Current** | **Goal** | | |
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| **6. Business Results Expected** | | |  |  | | | | | | | | | | |  |
| **7. Risks** | | |  | What obstacles does the team see, and how can they be resolved? | | | | | | | | | | |  |
| **8. Customer Benefits** | | |  | How will this project help the customer of the organization? Could improvements have a negative impact on the customer? | | | | | | | | | | |  |
| **9. Technology Architecture** | | |  | What are the specific tools/technologies you will be using? What is the experience of team members with these tools? | | | | | | | | | | |  |
| **10. High Level Schedule/Work Breakdown Structure** (Key milestones & dates) | | | | | | **Responsible**  **individual** | | **Output (notes, diagrams, interviews, screen prints)** | | **Date started if in progress**  **Or Expected completion date** | | | **Date completed or date completion is expected** | |
| Planning | | | | | |  | |  | |  | | |  | |
| Analysis | | | | | |  | |  | |  | | |  | |
| Design | | | | | |  | |  | |  | | |  | |
| Implementation: Construction | | | | | |  | |  | |  | | |  | |
| Implementation: Testing | | | | | |  | |  | |  | | |  | |
| Installation | | | | | |  | |  | |  | | |  | |

**Charter Development Guidelines:** Examples are in *italic*s. You can expand the form to meet your requirements as you enter text.

**Project Name**: Enter the name for your project – the name should convey a sense of purpose. Should contain an action word; such as – improve, develop, implement, reduce, etc.

*Reduce Cycle Time for Resolving Disability Disputes*

**Product/Process Impacted**: What you are working on.

*Disability Claim Process*

**Champion:** The sponsor of the project. Include Title and Name

*CTO, Caroline Smith*

**Organization:** Where you work.

*Corporate HQ – Shared Services*

**Start Date:** This is the first day on the project.

**Target Completion Date:** This is depending on the negotiated time line and scope with the sponsor.

1. **Project Manager(s) Name**: who will be the PM and Client contact?
2. **Project Team Member(s) Name & Role:** Name of the other Team member(s) and their role. What are the specific skills/roles of each team member?
3. **Project Description:** Several sentences addressing: why you are undertaking this project, the magnitude of the problem, general approach to be taken and expected benefits.

The Shared Services Benefits Group receives on average 30 claim appeals per month. Many of these are resolved by providing information clarifying the process and others should have been handled locally or by directly working with the service provider. This project will improve the process currently in use so that calls/claims are resolved quicker. This will allow members of this organization to focus on more strategic issues and will improve client satisfaction and eliminate re-work.

1. **Project Scope:** What the boundaries are of the process that you are going to be working on.

This "Process" begins with opening of a claim dispute and ends when the disputed claim case being closed.

1. **Project Goal:** Describe the target(s) that you are planning to achieve. Reduce cycle time by 50%, reduce cost per computer installation by 50% etc. If you don’t have a quantifiable target then you cannot claim that you have reached your goal.

Include the historical baseline information. The current value for the process will be updated as the project progresses toward your goal.

*For cycle time: Baseline- 2 days, Current- 2 days, Goal- 1 day (the goal reflects the 50% reduction from baseline)*

*For cost: Baseline- $1000, Current- $800, Goal- $500 (the goal reflects the 50% reduction from baseline)*

You may have other metrics that you are working to impact; if so, substitute them for any that don’t apply. You may have only one metric and will rarely have more than three.

1. **Business Results:** What the benefits are to your organization when this project is complete. How will this project impact your organizations “Dashboard” metrics? What will be the impact to the financial bottom line?
2. **Risks:** Identify potential risks
3. **Customer Benefits:** What are the benefits to the customers of this project if the process/product is improved.

*The people using the claims dispute process will get faster results and resolution of their claim. This should result in better customer satisfaction levels with the process as well as improved productivity of service operators through fewer status inquiries.*

1. **Technology Architecture:** What are the tools you will be using (development tools, data base, etc)? How will you obtain the tools? What is the level of experience of specific team members with these tools?
2. **Schedule:** Enter the anticipated dates (key milestones) that you will complete each phase of the project; work with your champion to determine these dates.