*[Click here for Strategic Project Charter Definition](#Definition)*

|  |
| --- |
| **GENERAL INITIATIVE INFORMATION** |
| **Initiative Name** |  |
| **Initiative Champion** |  | **Initiative Manager** |  |
| **Planned Initiative Start Date** |  | **Planned Initiative End Date** |  |

|  |
| --- |
| **INITIATIVE OVERVIEW** |
| **Initiative Objective** |  |
| **Company Strategic Objective(s) Supported** |  |
| **Objective 1** |  | **Key Result (metric)** |  |
| **Key Result (metric)** |  |
| **Key Result (metric)** |  |
| **Objective 2** |  | **Key Result (metric)** |  |
| **Key Result (metric)** |  |
| **Key Result (metric)** |  |
| **Objective 3** |  | **Key Result (metric)** |  |
| **Key Result (metric)** |  |
| **Key Result (metric)** |  |
| **Deliverable(s)** |  |
|  |
|  |

|  |
| --- |
| **CRITERIA FOR SUCCESS OR FAILURE** |
| * ***This Initiative will be deemed a success if all the following criteria are met***
* ***This Initiative will be considered a mixed result if some but not all the following criteria are met***
* ***This Initiative will be deemed a failure if none of the following criteria are met***
 |
| **Criteria** |  | **Result** |  |
| **Criteria** |  | **Result** |  |
| **Criteria** |  | **Result** |  |

|  |
| --- |
| **INITIATIVE MILESTONES** |
| **MILESTONE** | **OWNER** | **START DATE** | **FINISH DATE** | **STATUS****(Not Yet Started, In Process, or Complete)** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |
| --- |
| **DEPARTMENTS IMPACTED** |
| **DEPARTMENT** | **IMPACT****(None, Low, Med, High)** | **DEPARTMENT** | **IMPACT****(None, Low, Med, High)** |
| **Human Resources** |  | **Project Management** |  |
| **Information Technology** |  | **Customer Service** |  |
| **Finance/Accounting** |  | **Operations (Group 1)** |  |
| **Sales (Group 1)** |  | **Operations (Group 3)** |  |
| **Sales (Group 2)** |  | **Operations (Group 3)** |  |
| **Sales (Group 3)**  |  | **Marketing** |  |

|  |
| --- |
| **COMMUNICATIONS & TRAINING PLAN** |
|  |

|  |
| --- |
| **RESOURCES** |
| **Initiative Team Members** |  |
| **Support Resources** |  |
| **Other Resource Needs** |  |

|  |
| --- |
| **BUDGET COSTS** |
| **SPENDING CATEGORY** | **AMOUNT** | **DETAIL** |
| **Technology** |  |  |
| **Vendors (Consultants/Contractors/etc.)** |  |  |
| **Other Costs** |  |  |
| **TOTAL COSTS** |  |  |

|  |
| --- |
| **SIGNATURES & APPROVALS** |
| **ROLE** | **NAME** | **SIGNATURE** | **DATE** |
| **Initiative Manager** |  |  |  |
| **Initiative Champion** |  |  |  |
| **Executive Leadership Team** |  |  |  |

**What is an Initiative Charter?**

An Initiative Charter is a document which outlines the purpose of the Initiative, the way the Initiative will be structured, how it will be successfully implemented, and the Initiative authorization.

It describes the Initiative:

* Purpose, objectives, key results, and deliverables (i.e., what we must achieve)
* Stakeholders, roles, and responsibilities (i.e., who will take part in it)
* Resource, financial, and action plans (i.e., how it will be undertaken)
* Authorization (i.e., that the Initiative is approved for implementation)

[***Click Here to Go Back to the Top of the Document***](#Top)