

PROJECT DEFINITION TEMPLATE

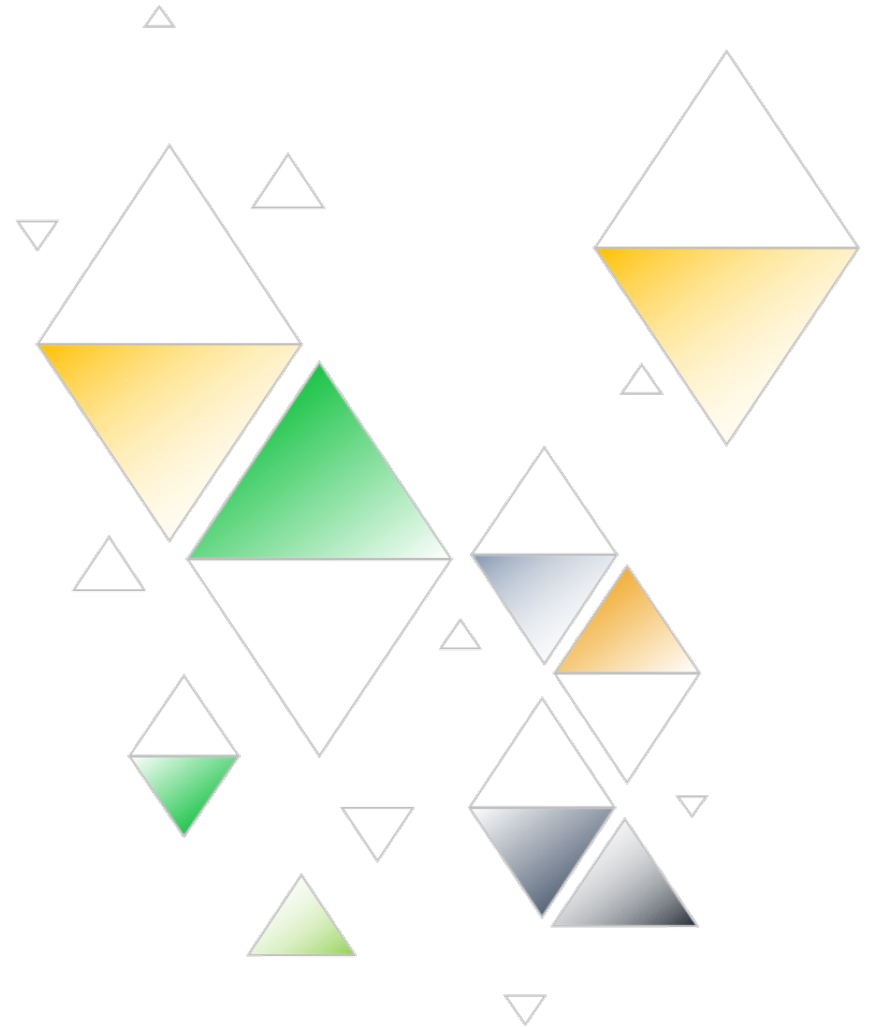
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Template begins on page 2.

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

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EMAIL

PHONE

ORGANIZATIONAL UNIT

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GREEN BELTS ASSIGNED

EXPECTED START DATE

EXPECTED COMPLETION DATE

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BLACK BELTS ASSIGNED

EXPECTED SAVINGS

ESTIMATED COSTS

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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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