

## PROJECT CHARTER

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| <p><b>Project Name:</b><br/>Marketing/Sales &amp; Business Processes Streamlining</p> <p><b>Project Sponsor:</b> 'Client's Organization'</p> <p><b>Sponsor Representative:</b> 'Client's Name'</p> <p><b>Document Prepared by:</b><br/>'Consultant representative' – 'Firm Name'</p> <p><b>Version:</b> 1</p> <p><b>Date:</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <p><b>Executive Summary:</b><br/>'Client's Organization', a recruitment-services provider, considers its business to have a high potential for success in the short-term and long-term. However, the promoters think the financial performance is not meeting expectations due to these factors:<br/>1 Ineffective management of the marketing/sales team<br/>2 Poor adoption of business processes in all functions</p> <p>'Client's Organization' is engaging the 'Firm Name' as a Consultant to set this right.</p>                                                                                                                                                                                                                                                              | <p><b>Key Project Personnel of the Consultant:</b></p> <p>Mr. ABC, On-site Consultant at 'Location'<br/>Contacts: 9xxxxxxx, &lt;<a href="mailto:abc@xyz.com">abc@xyz.com</a>&gt;</p> <p>Mr. DEF, Off-site Consultant at 'Location'<br/>Contacts: 9xxxxxxx, &lt;<a href="mailto:def@xyz.com">def@xyz.com</a>&gt;</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <p><b>Purpose of Project:</b><br/>1 To develop a robust sales strategy, planning and monitoring mechanism for the client to consistently achieve revenue and net cash-flow targets;</p> <p>2 To develop and implement a professional set of business processes for the client to simplify the management of the firm across functions in order to achieve its long-term goals.</p> <p><b>Business Objectives:</b><br/>1 To significantly improve sales force performance for the Sponsor within 30 days</p> <p>2 To develop a set of business processes to help the Sponsor manage the business effectively, within 30 days</p> <p><b>Project Scope and Boundaries:</b> Work will be specific to the areas stated under 'Business Objectives' and for 'client name' operations in 'location'.</p> <p>Work that is not explicitly stated under 'Business Objectives' is outside the boundaries of this project and will be considered as "out of scope" or "project creep".</p> <p><b>Assumptions:</b><br/>1 Improving the sales force performance and the Sponsor's team following business processes will significantly improve financial results.<br/>2 The Sponsor's team will follow processes and instructions as developed and implemented by the Consultant.<br/>3 The information sought by the Consultant will be available and provided in time.</p> <p><b>Constraints:</b><br/>Time of both the Sponsor and Consultant.</p> | <p><b>Project Deliverables:</b><br/>1 A set of recommendations and processes to be implemented for the Sponsor</p> <p>2 Implementation of the recommendations and processes with full cooperation and assistance of the Client</p> <p><b>Project Milestones:</b><br/>Operations study and analysis - 07 days<br/>Recommendation Report &amp; Finalization - 03 days<br/>Implementation - 20 days<br/>Project completion - 30 days</p> <p><b>Project Budget:</b><br/>Rs.xxx/- plus Service Tax</p> <p><b>People Required to be Involved in the Project:</b><br/>1 All relevant members of the 'client name' team<br/>2 Promoters of 'client name'<br/>3 One on-site consultant of 'Firm Name' at the Sponsor's office<br/>4 One off-site consultant of 'Firm Name' at 'location'</p> | <p><b>Project Risks:</b><br/>1 The Sponsor's team is unable or unwilling to provide the required information to the Consultant in a timely manner.<br/>2 The Sponsor's team resists the implementation of the changes recommended.<br/>3 There are other significant factors impacting the performance of the Sponsor's business that are outside the project scope.</p> <p><b>Communication Plan:</b><br/>1 The on-site consultant shall document and share with the Sponsor and off-site consultant progress on every working day as a Daily Progress Report.</p> <p>2 On the last working day of each week, the on-site consultant shall document and share the progress made so far in the project and the planned activities for the coming week.</p> <p><b>Signatures to the Project Charter:</b></p> <p>'Sponsor representative' – 'Project Sponsor'</p> <p>'Consultant representative' – 'Firm Name'</p> <p>Date:</p> |