

Project Charter Template

The main purpose of a project charter is to gain consensus around the project objectives, activities, schedule, potential risks, and budget. Developed by the project manager at the outset of the project timeline, the charter usually requires approval by the project sponsor. After receiving approval, it should be reviewed by all members of the project team.

HubSpot Tip: The project charter should not replace a project plan or work plan. The charter should be brief (one to two pages) and provide a high-level summary of each aspect of the project, while the project plan provides additional detail and depth.

Project Overview

Start the charter with a table providing all of the essential information about the project.

Project Name:	
Project Sponsor:	
Project Manager (PM):	
PM Email Address:	
PM Phone Number:	
Business Unit:	
Expected Start Date:	
Expected Completion Date:	
Estimated Budget:	

HubSpot Tip: Include contact information for any important players, most notably, the project manager.

Project Description

In this section, you should aim to convey the essence of the project to the reader. Each sentence should be no longer than a paragraph.

Purpose

Describe the reason the team is undertaking this project. What are the client’s needs?

Scope

Explain what will be included in the project tasks and briefly summarize what will not.

Key Deliverables

List the main services or products that the team will provide to the client.

Resources

Provide a list of the team members, facilities, equipment, and other items that are essential to the success of the project. Use a simple table, like the one shown below.

Team Members	Facilities	Equipment	Other Resources

Schedule

You have already identified the expected start and end dates of the project. In this section, tell the reader when the most important project activities are expected to occur.

Key Milestone	Start Date	Completion Date

Risks

Note any risks to project success, indicating their potential impact on the budget and timeline. Consider expanding on this list in a separate risk management plan.

Potential Risk	Perceived Impact	Proposed Mitigation Strategy

Approval and Signatures

The project sponsor should review and approve the project plan. Include a signature line directly in the project charter.

[Name], Project Sponsor

[Name], Project Manager

HubSpot Tip: In many organizations, approval of the project charter by the sponsor signals permission for the team to begin working on the project tasks.