
Project Charter

Sanitized PM Artifact Sample

Version	1.0
Document Owner	Project Manager
Status	Draft for Alignment
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1. Project Overview

Project Name Merchant Settlement Workflow Upgrade	Project Type Cross-functional delivery project
Project Manager Sample Role	Sponsor / Business Owner Head of Operations
Project Status Initiation and alignment	Delivery Context This project improves how merchant settlements are prepared, validated, and handed over across internal operational teams. The current workflow relies on fragmented inputs, inconsistent handoffs, and weak visibility of release readiness.

2. Project Purpose

The project exists to reduce operational friction in the merchant settlement workflow and create a more reliable, visible, and manageable process before release.

The current state creates avoidable delays, unclear ownership, and inconsistent readiness checks. This project introduces a clearer delivery structure, defined control points, and better handoff discipline across teams involved in settlement preparation and release.

3. Objectives

Primary Objective

Create a more controlled and predictable settlement workflow with clearer ownership, better readiness checks, and fewer avoidable delivery delays.

Secondary Objectives

- reduce ambiguity in cross-team handoffs
- improve milestone visibility
- make release conditions explicit rather than assumed
- reduce the number of unresolved blockers reaching final release stages

Desired Outcomes

- key workflow stages are documented and owned
- readiness criteria are visible before release
- cross-functional dependencies are tracked earlier
- project status reflects real delivery confidence

4. Success Criteria

- the target workflow is agreed and documented
- key stakeholders confirm role and ownership clarity
- release readiness conditions are defined and used
- milestone status can be reviewed through a consistent control layer
- unresolved blockers are surfaced earlier in the cycle
- handoff quality between involved teams improves measurably

5. High-Level Scope

In Scope	Out of Scope
current-state workflow review target workflow definition stakeholder and ownership clarification readiness criteria definition delivery milestone structuring dependency and blocker visibility model release coordination logic basic supporting PM artifacts for control and reporting	full product redesign long-term operating model redesign beyond this workflow staffing model changes outside the project boundary system architecture replacement non-related operational process improvements

6. Constraints and Assumptions

Constraints • delivery must align with existing operational capacity • stakeholder time for workshops and reviews is limited • changes must fit into an already committed delivery calendar • documentation and coordination improvements must remain lightweight and usable	Assumptions • key stakeholders will participate in alignment sessions • existing workflow pain points can be identified through current documentation and team input • release readiness expectations can be standardized without major system changes • supporting teams will provide timely feedback during milestone reviews
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7. Key Stakeholders

Role	Responsibility	Involvement
Sponsor / Business Owner	strategic alignment and approval	high
Project Manager	coordination, planning, control, reporting	high
Operations Lead	workflow input, ownership clarity, acceptance	high
Technical Lead	implementation feasibility and dependencies	medium
QA / Validation Lead	readiness and quality input	medium
Support / Release Stakeholder	release communication and handover input	medium

8. Key Milestones

Milestone	Target Timing	Owner
Project kickoff and alignment complete	Week 1	Project Manager
Current-state review complete	Week 2	Project Manager / Operations Lead
Target workflow agreed	Week 4	Sponsor / Operations Lead
Readiness criteria defined	Week 5	PM / QA / Ops
Milestone and dependency model confirmed	Week 6	Project Manager
Release preparation review complete	Week 8	Project Manager
Handover and closure review complete	Week 9	Project Manager

9. Governance Summary

Reporting Cadence Weekly project status update	Working Rhythm Short ongoing coordination across involved owners, with focused milestone and blocker reviews
Decision Path Project Manager prepares the decision context, relevant owners review, sponsor confirms where escalation or approval is required	Escalation Path Project Manager → Sponsor / Business Owner → Functional Leadership if unresolved cross-team blockers affect milestone confidence

Core Control Artifacts
Project Charter
Stakeholder Map
Scope Statement
Milestone Tracker
Risk Register
Issue & Blocker Log
Release Checklist

10. Approval and Alignment

Name / Role	Review Type	Status
Sponsor / Business Owner	alignment review	pending

Name / Role	Review Type	Status
Operations Lead	workflow review	pending
Project Manager	document owner review	complete