

SAMPLE PROJECT CHARTER

POS deployment project charter, adapt for each engagement before kickoff.

01 PROJECT OVERVIEW

Client name: _____

Site(s) in scope: _____

Target go-live date: _____

Project sponsor (VAR): _____

Project sponsor (client): _____

Contract / SOW reference: _____

02 PURPOSE AND OBJECTIVES

State in two or three sentences what this project delivers and why it matters to the client's operation. Tie it back to the discovery findings, not generic marketing language.

Objective 1: _____

Objective 2: _____

Objective 3: _____

03

SCOPE SUMMARY

IN SCOPE:











Other:

OUT OF SCOPE

[explicitly excluded, per the SOW]:











Other:

04

GOVERNANCE AND ROLES

VAR

TIER 1

VAR executive sponsor (escalation):

TIER 2

VAR project manager (primary point of contact):

TIER 3

VAR technical lead (backup point of contact):

CLIENT

TIER 1

Client executive sponsor (escalation):

TIER 2

Client point of contact (primary):

TIER 3

Client backup contact (site manager / IT lead):

Escalation path: day-to-day questions and decisions route through the primary points of contact. Issues that affect budget, contract scope, or timeline escalate to the executive sponsors on both sides.

05 MILESTONES AND KEY DEPENDENCIES

■ Site survey and discovery sign-off: _____

■ Network and cabling readiness: _____

■ Hardware staged and configured: _____

■ Integrations tested (payments, inventory, etc.): _____

■ Staff training complete: _____

◆ Go-live: _____

■ Post-go-live support handoff: _____

06 CHANGE CONTROL

Any change to scope, schedule, or budget requires written sign-off from both project managers before work proceeds. Verbal requests, including those made on-site, do not authorize additional work.

07 SIGN-OFF

VAR REPRESENTATIVE

Name: _____

Signature: _____

Date: _____

CLIENT REPRESENTATIVE

Name: _____

Signature: _____

Date: _____

SAMPLE KICKOFF MEETING AGENDA

Run this within the first week after contract signature, before mobilization begins.

DURATION:

60-75 minutes.

ATTENDEES:

both executive sponsors, both points of contact, and any technical leads whose input is needed to confirm milestones.

- 01

5 min

WELCOME AND INTRODUCTIONS
Confirm everyone in the room knows each other's role, not just their name.
- 02

10 min

PROJECT PURPOSE AND OBJECTIVES
Walk through the charter's objectives; confirm the client agrees this is what success looks like.
- 03

10 min

SCOPE REVIEW
Read the in-scope and out-of-scope lists aloud. Surface any disagreement now, not mid-project.
- 04

10 min

GOVERNANCE AND POINTS OF CONTACT
Confirm names for every role on the governance chart, including backups. Explain the escalation path.
- 05

15 min

MILESTONES AND DEPENDENCIES
Walk the milestone table. Flag any client-side dependency (site readiness, ISP install, staffing) and confirm ownership.
- 06

10 min

CHANGE CONTROL PROCESS
Explain how scope changes get requested, priced, and approved. Get verbal agreement before the charter is signed.
- 07

10 min

COMMUNICATION CADENCE
Set the standing check-in schedule (e.g., weekly status call) and the channel for urgent issues.
- 08

5 min

SIGN-OFF AND NEXT STEPS
Both sponsors sign the charter. Confirm the date of the first status check-in.

Leave this meeting with a signed charter, not just a shared understanding. If a stakeholder can't attend, reschedule rather than proceed without them.