For all projects the best place to start is with a documented agreement on what you and your team are expected to deliver, timeframe for delivery, and boundaries – what is included in the project and what is not.

This agreement can take the form of a written memo, email, or document. In the world of project management, this document is called a project charter. The project charter outlines your expectations and encourages dialogue and discovery with the people or entities who desire the project or task to be undertaken and those who will be impacted either by the project or by the results of the project.

Following are the key elements of a project charter:

- **Background/Business Need:** Why is this project being undertaken? What is the current situation? What opportunity exists?

- **Scope:** What is the purpose of the project? What will exist when the project is finished? What does your customer want delivered?

- **Deliverables:** What specific things or services will exist when the project is complete?

- **Boundaries:** What will be included in the project? What will not be included in the project?

- **Key Stakeholders:** Who are the individuals, groups, or organizations that will be actively involved in the project, affected by its outcome, or will be recipients of the deliverables?

- **Resources:** What resources (human resources, budget, vendors, etc.) are needed to implement the project?

- **Requested Timeline/Milestones:** What timeline has been requested to complete your project? What are the key dates involved with implementing this project?

No matter what size project or task you’re being asked to take on, the first step toward success is clarifying what you are being asked to do.