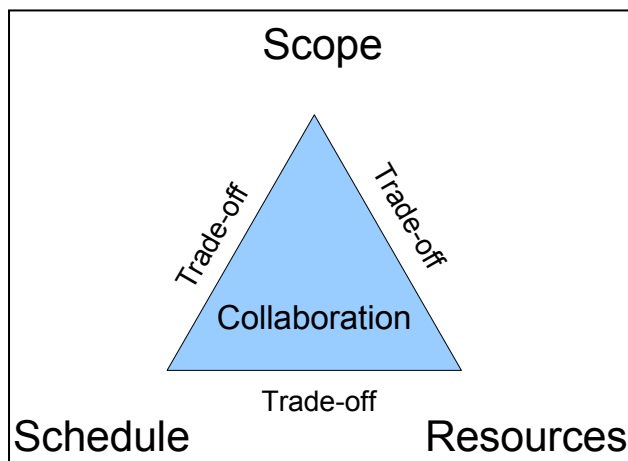


	1. Decide	2. Plan	3. Do	4. Finish
	Project Charter	Project Plan	SDLC Plan	Lifecycle Plan
A. What	1A Scope	2A Requirements	3A Build	4A Closure
B. Why	1B Business Plan	2B Communication	3B Culture	4B Audit
C. How	1C Architecture	2C Design	3C Production	4C Process
D. Who	1D Core Team	2D Staffing	3D Support Team	4D Ownership
E. When	1E Milestones	2E Schedule	3E Roadmap	4E Maintenance
F. Where	1F Operations	2F Deployment	3F Recovery	4F Archive

This is a sample project charter for use during a VitalSkill LLC Governance and Taxonomy Workshop. The information contained in this document is intended to be used as an example for training purposes. The contents of this document are fictitious but typical of the project information developed during the two-day Governance and Taxonomy Workshop.

For more information on using this document or scheduling a Governance and Taxonomy Workshop, please contact Mark Ragar Schneider: mark@vitalskill.com



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Project Information

Project Name	Organization
Project Sponsor	<SPONSOR NAME>, VP Operations
Project Manager	<NAME>
Proposed Project Start Date	
Proposed Project End Date	
This Document Last Updated	
This Document Updated by	

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Project Summary

Project Mission Statement

This project seeks to implement MOSS 2007 as an enterprise collaboration environment. Because MOSS 2007 will fulfill a mission-critical role at Organization, it must be conceived, deployed, and operated according to best practices, corporate policies, regulatory constraints, and in concert with other Organization initiatives.

Success Criteria

- **Scope management is the highest priority Success Criteria.** In order to build a stable and trustworthy foundation for Organization collaboration, it is imperative that the scope of this project be kept specific, small, and measurable. The initial implementation must be robust and successful. Any potential scope creep will distract from and harm this all-important scope.
- **Resources are the second highest priority Success Criteria.** This project is being executed against established operating budgets and is not funded as a project (as of this writing).
- **Schedule is the third highest priority Success Criteria.** It is recognized that a wide range of Organization resources and external resources may be required to complete this project. This coupled with no project funding means that the project schedule must remain

Project Scope

- **This is an "out of the box" implementation** of MOSS 2007. No customizations are in the scope of this project, although they will be addressed in later phases and projects.
- **This project addresses "internally facing"** SharePoint sites. SharePoint will extend to external sites during a later project.
- **A SharePoint training plan** will be developed and implemented as part of this project.
- **A Governance Plan** will be developed to effectively submit this technology to leadership oversight without hindering the agile use of the product.
- **A Taxonomy** will be adopted and used as the organizing principle for SharePoint deployment, management, and use.

What's out of Scope?

- **There will be no customizations** as part of this project.
- **There will be no implementation of externally facing** sites in this project.
- **This project will not address external data source** connectivity with MOSS 2007.
- **This project will not establish or augment corporate records management policies,** workflows, or systems. It will not integrate MOSS 2007 with external document management or archiving systems.
- **This project will not provide a high-availability** production environment for SharePoint 2007.

Project Proposal

<p>Situation The problem to be solved (As is)</p>	<p>Description of Current Situation Organization deployed SharePoint 2003 as a 'pilot' collaboration environment. The pent up demand for collaboration coupled with the flexibility and power of the tool resulted in rapid growth. The current system has outgrown its deployment and its management controls.</p> <table border="1" data-bbox="380 600 1433 1125"> <tr> <td data-bbox="380 600 509 926"> <p><i>Issues</i></p> </td> <td data-bbox="509 600 1433 926"> <ul style="list-style-type: none"> • Need to automatically capture and manage intellectual property • Need improved communication across domains • Performance is a concern to global users • Security and administrative management need to be improved </td> </tr> <tr> <td data-bbox="380 926 509 1125"> <p><i>Risks</i></p> </td> <td data-bbox="509 926 1433 1125"> <ul style="list-style-type: none"> • Lack of trained resources • Lack of taxonomy planning • Lack of governance planning </td> </tr> </table>	<p><i>Issues</i></p>	<ul style="list-style-type: none"> • Need to automatically capture and manage intellectual property • Need improved communication across domains • Performance is a concern to global users • Security and administrative management need to be improved 	<p><i>Risks</i></p>	<ul style="list-style-type: none"> • Lack of trained resources • Lack of taxonomy planning • Lack of governance planning
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<p><i>Risks</i></p>	<ul style="list-style-type: none"> • Lack of trained resources • Lack of taxonomy planning • Lack of governance planning 				
<p>Target The solution requirements (to be)</p>	<p>Description of Desired Outcome Make use of lessons learned by the IT industry as a whole, and the availability of a more mature and robust SharePoint release to design and implement a truly scalable and extensible enterprise collaboration environment.</p> <table border="1" data-bbox="380 1350 1433 1738"> <tr> <td data-bbox="380 1350 610 1650"> <p>Benefit</p> </td> <td data-bbox="610 1350 1433 1650"> <ul style="list-style-type: none"> • Improved collaboration and communication • Policy alignment • Improved security • Improved performance • Improved user agility </td> </tr> <tr> <td data-bbox="380 1650 610 1738"> <p>Other</p> </td> <td data-bbox="610 1650 1433 1738"> <ul style="list-style-type: none"> • </td> </tr> </table>	<p>Benefit</p>	<ul style="list-style-type: none"> • Improved collaboration and communication • Policy alignment • Improved security • Improved performance • Improved user agility 	<p>Other</p>	<ul style="list-style-type: none"> •
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<p>Other</p>	<ul style="list-style-type: none"> • 				

<p>Proposal The options available, the option chosen, and why (how to)</p>	<p>Chosen Solution</p> <ul style="list-style-type: none"> • MOSS 2007 - The conceptual design calls for the use of MOSS 2007 within a production environment, and integrated with hardware and software infrastructure, in alignment with larger corporate initiatives (such as enterprise monitoring). • Best Practices - The intent of this project is to provide system deployment, configuration, and operation according to Microsoft, industry, and Organization best practices. • "Point of Arrival" Platform - This project also intends to provide a "Point-of-Arrival" environment for legacy information that is to be migrated or redeployed in the new environment. • Governance Integration - Application and interpretation of policy and regulatory requirements is subject to a supervisory "Governance" review provided by corporate officers. These officers must have the power and ability to interpret and enforce corporate policy as it relates to the technical configuration, deployment and use of this solution within Organization. 								
<table border="1"> <thead> <tr> <th data-bbox="380 1087 711 1184">Option Considered</th> <th data-bbox="711 1087 1432 1184">Reason for Rejecting</th> </tr> </thead> <tbody> <tr> <td data-bbox="380 1184 711 1440"><i>Continue 'as is'</i></td> <td data-bbox="711 1184 1432 1440">The current implementation using SharePoint 2003 has grown beyond expectations. This growth rate has led to performance degradation and the need for improved structure and governance. The current SharePoint 2003 implementation is not capable of meeting these demands.</td> </tr> <tr> <td data-bbox="380 1440 711 1661"><i>Eliminate SharePoint</i></td> <td data-bbox="711 1440 1432 1661">Organization has an acute need for agile and secure collaboration capabilities. The elimination of SharePoint will force this collaboration into informal channels of communication that are not designed to support the needs of Organization.</td> </tr> <tr> <td data-bbox="380 1661 711 1883"><i>"Cripple" SharePoint</i></td> <td data-bbox="711 1661 1432 1883">Organization has an acute need for agile and secure collaboration capabilities. The elimination of SharePoint will force this collaboration into informal channels of communication that are not designed to support the needs of Organization.</td> </tr> </tbody> </table>	Option Considered	Reason for Rejecting	<i>Continue 'as is'</i>	The current implementation using SharePoint 2003 has grown beyond expectations. This growth rate has led to performance degradation and the need for improved structure and governance. The current SharePoint 2003 implementation is not capable of meeting these demands.	<i>Eliminate SharePoint</i>	Organization has an acute need for agile and secure collaboration capabilities. The elimination of SharePoint will force this collaboration into informal channels of communication that are not designed to support the needs of Organization.	<i>"Cripple" SharePoint</i>	Organization has an acute need for agile and secure collaboration capabilities. The elimination of SharePoint will force this collaboration into informal channels of communication that are not designed to support the needs of Organization.	
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Project Schedule Estimate

High-Level Schedule Rough Order of Magnitude (ROM) per Project Management Institute guidelines.	Milestone	Start Date	Completion Date
	DECIDE! Project Initiation		
	1. Project Charter (This Document)		
	PLAN! Project Planning		
	1. Project Plan 2. Communication Plan 3. Training Plan 4. Governance Plan 5. Design 6. Deployment Plan 7. Support Plan		
	DO! Project Build		
	8. System Deployment and Testing		
	FINISH! Project Closure		
	9. Testing Complete 10. Training Complete 11. System Available for Production Use		
	BEGIN Next Phase 12. Migration of Legacy Sites Begins		

Project Resource Estimate

Core Project Team	Sponsor	
	Steering Committee	
	Global Application Owner	
	Project Manager	
	Core Project Team	

Additional Resources	Steering Committee <ul style="list-style-type: none">○ Sponsor○ Architecture○ Security○ Application Owner (Service Delivery)○ Project Manager Governance Oversight <ul style="list-style-type: none">○ Enterprise Architecture Committee○ Knowledge Management Committee○ Security○ Information Technology Service Delivery○ Business Content Owners○ Human Resources Leadership○ Corporate Legal Representatives as need User Acceptance Testing
Approvals Required	Technical Trainers <ul style="list-style-type: none">○ Internal○ External MOSS 2007 Subject Matter Experts <ul style="list-style-type: none">○ Deployment○ Configuration○ Administration○ Design○ Security Dedicated FTE MOSS 2007 Administration Resources Steering Committee

<p>High-Level Budget Rough Order of Magnitude (ROM) per Project Management Institute guidelines.</p>	<p>Type of Expense</p>	<p>Cost (\$)</p>	<p>Account Number / Funding Source</p>
	Staff Expense		
	Capital Expense		
	Operating Expense		
	Service and Consulting		
	Contingency		
	<p>Total Budget for Project Planning (High Level)</p>		

Risks, Constraints and Assumptions

<p>Risks</p>	<ul style="list-style-type: none"> • Need to enhance governance oversight • MOSS 2007 will draw attention to weaknesses and inconsistencies in corporate policies • Lack of internal MOSS 2007 technical knowledge • Possible combination of implementation and migration (these two must be managed separately) • Resource conflict, over commitment of resources, and resource-leveling • New functionality added to new environment • MOSS 2007 Integration
---------------------	---

Constraints	Rank	Project Constraint Type	Description of the Constraint
	1.	Policy	All applicable Organization policies must be identified and reconciled with the project goals and execution.
	2.	Governance	This project requires a higher level of executive governance and support than traditional IT projects.
	3.	Regulatory	Regulatory constraints must be identified, documented, and used to govern the project and the product's operation.
	4.	Manufacturer Best Practices	Where possible, Organization seeks to design, develop, deploy and use its MOSS 2007 implementation according to Microsoft best practices and recommendations.
	5.	Industry Best Practices	Where possible, Organization seeks to design, develop, deploy and use its MOSS 2007 implementation according to industry best practices and recommendations.
	6.	Organization Best Practices	Where possible, Organization seeks to design, develop, deploy and use its MOSS 2007 implementation according to Organization best practices and recommendations.
	7.	Organization Initiatives and Technology Portfolio	Where possible, Organization seeks to design, develop, deploy and use its MOSS 2007 implementation according to Organization initiatives and projects (monitoring, document management)

Assumptions	Rank	Project Assumption Type	Description of the Assumption
	1.	Funded	Funded project financed through project budget.
	2.	Split Project Schedule	Schedule will divided into two phases: <ul style="list-style-type: none"> • System Implementation • Migration of legacy content to new system
	3.	Existing Resources with Minimal Augmentation	<ul style="list-style-type: none"> • Labor primarily provided by existing Organization resources under supervision of Core Project Team members • Core Project Team will need to leverage other technical and subject matter experts during the course of the project • Some external staff augmentation and subject matter expertise may be retained to support and assist the team

Appendix

Requirements Matrix

	Business Need	Major Capability	Technical Requirement	Owner / Team Leader	Metrics
	1	1.1	1.1.1		
1.0	Establish taxonomy and governance to automate use and management of organizational information				
2.0	Agility, independence and freedom for site administrators				Approval - Governance Making that Site Admin can't violate the approved policy.
2.1		User roles will be based on the four standard roles standard in SharePoint			Site administrator applies permissions and roles to individual libraries and lists breaking inheritance
2.2		Site administrators have the ability to modify and create custom roles based on four core roles.			
2.3		Site administrator will be able to assign roles based on sites, lists, and libraries			Site administrator applies permissions and roles to individual libraries and lists breaking inheritance
3.0	End User Ease of Use				

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3.1		Logon Process Documentation			
3.1.1			Local browsers are configured so that SharePoint sites are Trusted Sites		User implements User tests
3.1.2			Browser best practices will be published and distributed to minimize repetitive sign-on when navigating SharePoint Sessions		User implements User tests
3.2		Notification Management Documentation			User implements User tests
3.2.1			Mailbox best practices will be published and distributed to create rules that remove automated SharePoint notifications from the general mailbox and move them to a "Notifications Folder" in Outlook		User implements User tests
3.2.2			Notification settings and management documentation will be published and distributed to enable users to minimize nuisance, non-informative, and repetitive SharePoint status notifications		

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4.0	Enhanced and simplified navigation				MySite creation Compare site publication with all sites lists
4.1		MySite as personal portal and landing-page			MySite creation Compare site publication with all sites lists and navigate to sites
4.1.1			Index of sites the MySite owner is a member of		
4.1.2			Ability to navigate to member sites without having to resort to using the "Favorites" feature of the browser		
4.1.3			Quotas		Mysite is provisioned according to policies
4.1.4			MySite automatic provisioning on first navigational access		
4.2		MySite owner is able to effectively search and navigate sites appropriate for their role and interests			
4.2.1			Site and document metadata retention according to taxonomy		
4.2.2			Effective Indexing of sites		
4.2.3			Audience features enabled and provisioned		

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4.2.4			Security trimmed searches and navigation		Try to break security boundaries. Audit by IT Security
5.0	Socialize the collaboration environment as an integral part of the corporate culture				Approval of training plan by project team
5.1		Communications blitz			
5.1.1			Email, office mail, notifications and updates		
5.1.2			Posters		
5.1.3			Awarenes events		
5.2		Training and Orientation			
5.2.1			User Training		Approval of training plan by project team
5.2.2			Site Administrator Training		Approval of training plan by project team
4.2.3			System Administrator Training		Approval of training plan by project team
5.2.4			Developer Training		Approval of training plan by project team
6.0	Align with Organization Security Policies				Approval by Security Officer
6.1		User and Site Provisioning Process Management			
6.1.1			Must be able to provision and de-provision users using the		

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			enterprise identity management system in use at Organization.		
6.1.2			Site administrators provision groups and users into individual sites based on pool of users in identity management system		Security provisions and de-provisions users successfully in SharePoint through the identity management system.
6.1.3			Security able to report and review on user access to sites based on recorded metadata and activity logs		Prove that logged and reported. Role based access
6.1.4			SharePoint environment provides for segregation of information based on security restrictions		EA walk through
6.1.5			Site administrators will not be allowed to provision temporary users not found in the identity management system		Site administrator attempts to provision temp user.
6.2		Security-trimmed navigation, search and presentation capabilities			
7.0	Align with records management policies and governance				

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7.1		Retirement of unused information			
7.2		Identify and review existing policies			
7.3		Ability to implement new corporate policies			
7.4		Global SOP or policy to govern document policies			
7.5		Setting up governance structure			
7.6		Site archive			
7.7		Site de-provisioning			
8.0	Build according to infrastructure and service delivery best practices				
8.1		Build for recovery and continuity management			Percentage of maturity, implementation, followed and adhered to
8.1.1			Disaster Recovery Plan		Approval by Team
8.1.2			Document Recovery plan		Approval by Team
8.1.3			Site Recovery Plan		Approval by Team
8.1.4			Establish recovery time baselines		Build and take baseline measurements
8.2		Align with performance			Robots in place and taking baseline data

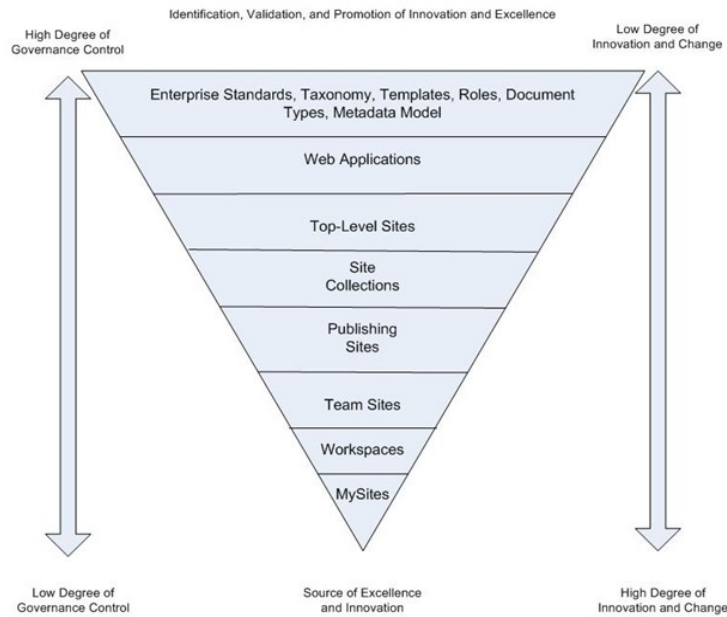
Project Charter

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		management initiatives			
8.2.1			Uptime		Robots in place and taking baseline data
8.2.2			Event-level		Robots in place and taking baseline data
8.2.3			Web Session Latency		Robots in place and taking baseline data
8.3		Build and configure for linear capacity growth			Best practices review of deployment plan
8.4		Build for data archiving and management			Best practices review of deployment plan
8.5		Build and configure for feature extensibility			Best practices review of deployment plan
8.6		Language Packs installed and maintained			EAC approval Language Packs Installed Language Packs Tested
9.0	Establish ongoing "roadmap" of future enhancements and improvements				Sponsors
9.1		Lifecycle Planning			
9.2		Periodic System Health Checks			

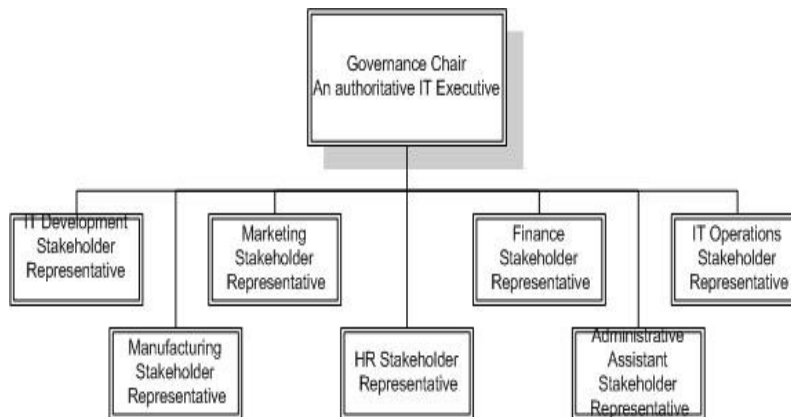
Governance Plan

Governance Model



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Format



Meeting Frequency

Permanent Membership

Rotating Membership

Top-Level Taxonomy

000	100	200	300	400	500	600	700	800	900
One to Many	One to One	Many to Many	Rapid Change	Static	Tools	Organization	Money	People	Products and Services
Validation	Validation	Validation	Validation	Validation	Validation	Validation	Validation	Validation	Validation

Next Steps (Next Day Action Plan)

Item	Description	Deadline	Metric	Owner
1	Establish Governance Team Site			
2	Schedule Design and Architecture Workshop			
3	Refine Project Schedule and Budget			