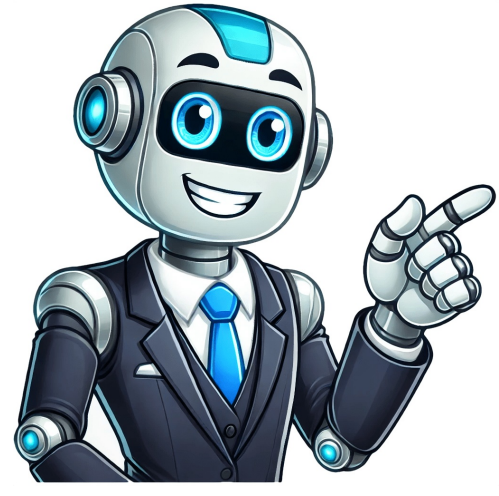


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fill in the required information. As a team lead, creating a project charter template can help standardize the way your team pitches new initiatives. This consistency ensures you're giving approvers all the information they need to make a decision. It also makes it easier for stakeholders to review your charter—since your charter follows a standardized format, stakeholders will know what to expect. The benefits of a digital project charter templateProject approvals are rarely a black and white process. Often, they involve a conversation with stakeholders and changes to your objectives, scope, or project responsibilities. Static Excel or Word documents can't capture this iterative process—they quickly become outdated and don't leave space for feedback.On the other hand, a digital project charter template lets you: Talk to stakeholders and collect real-time feedback via comments. Easily update project charter elements as needed.Give stakeholders a single source of truth for project information.Track which components of your charter have been approved.View your project charter template in different ways—as a standard list, Kanban board, Gantt chart, or calendar. Automatically sum project costs. Add contextual information to tasks by attaching documents, images, or videos. What to include in your project charter templateThe purpose of your project charter template is to outline each component of a successful project charter, so your team can easily fill in information as needed. A well-written project charter template typically includes the following elements: Project purpose: Why is this project important, and what business need does it fulfill? Project objectives: What do you want to achieve by the end of your project, and what metrics will you use to measure project success? Project scope and deliverables: What specific deliverables will you complete, and what will you NOT work on? Required resources or project needs: What do you need to complete this work? This includes people, tools, and budget. Project stakeholders: Who are your project team members? Who needs to approve the project charter, who's the project sponsor, and who should be looped into key decisions? To create your project charter template, add sections for each element above. Within each section, add more specific tasks to guide your team through the project charter creation process. For example, in the project stakeholders section you could create tasks to "identify project team" and "create a RACI chart to outline stakeholder responsibilities." You can also create project milestones to represent key turning points in your project plan. To track project budget and deliverables in one place, add columns to document the estimated cost of each deliverable—plus the estimated time requirement from your project team. This gives approvers a breakdown of all your required resources, so they can see why you're requesting a specific budget amount.Finally, add a column to track whether each component of your project charter has been approved. That way, you can track what's finalized and where you need to make changes. Integrated featuresList View. List View is a grid-style view that makes it easy to see all of your project's information at a glance. Like a to-do list or a spreadsheet, List View displays all of your tasks at once so you can not only see task titles and due dates, but also view any relevant custom fields like Priority, Status, or more. Unlock effortless collaboration by giving your entire team visibility into who's doing what by when.Project Overview. Project Overview is your one-stop-shop for all important project context. Give your team a bird's-eye view of the what, why, and how of your project work. Add a project description to set the tone for how you'll work together in Asana. Then, share any important resources and context—like meeting details, communication channels, and project briefs—in one place.Custom fields. Custom fields are the best way to tag, sort, and filter work. Create unique custom fields for any information you need to track—from priority and status to email or phone number. Use custom fields to sort and schedule your to-dos so you know what to work on first. Plus, share custom fields across tasks and projects to ensure consistency across your organization.Approvals. Sometimes you don't just need to complete a task—you need to know if a deliverable is approved or not. Approvals are a special type of task in Asana with options to "Approve," "Request changes," or "Reject" the task. That way, task owners get clear instructions on what actions they should take and whether their work has been approved or not. Recommended appsGoogle Workplace. Attach files directly to tasks in Asana with the Google Workplace file chooser, which is built into the Asana task pane. Easily attach any My Drive file with just a few clicks.OneDrive. Attach files directly to tasks in Asana with the Microsoft OneDrive file chooser, which is built into the Asana task pane. Easily attach files from Word, Excel, PowerPoint, and more.Dropbox. Attach files directly to tasks in Asana with the Dropbox file chooser, which is built into the Asana task pane.Microsoft Teams. With the Microsoft Teams + Asana integration, you can search for and share the information you need without leaving Teams. Easily connect your Teams conversations to actionable items in Asana. Plus, create, assign, and view tasks during a Teams Meeting without needing to switch to your browser.Different types of project charter templatesWe've outlined how to create a basic project charter template above, but you can also tailor your template to fit the specific needs of your team. Here are some different ways to customize your project charter template:Agile project charter template: If you use Agile project management, you can outline Agile-specific team responsibilities like the Scrum master, product owner, and development team. When estimating project resources, you can also use story points to gauge how much time each deliverable will require.Six Sigma project charter template: If your team uses Six Sigma, organize project deliverables into different phases of the Six Sigma project lifecycle: define, measure, analyze, improve, and control. Construction project charter template: For construction initiatives, it can be helpful to organize projected costs by type—for example, "labor" or "materials." You can also identify any subcontractors or suppliers you're working with when outlining key stakeholders and responsibilities. FAQsA project charter template is a useful tool if you regularly pitch projects that require a small or medium business investment. If your projects tend to require significant business investments, you may want to consider creating a business case instead. A business case is a more formal document that includes additional information and documentation, like your project's projected return on investment and any potential project risks.Copy and use your project charter template during the project initiation phase. Creating a project charter is the first step you should take for any new project. Before you spend time actually planning out the details of your initiative, you need to secure approval first.A project charter template can help standardize the way your team pitches new initiatives—plus improve the quality of pitches by ensuring you're covering key information. It also helps keep you and key stakeholders on the same page regarding the goals and scope of your project. Over time, this can prevent scope creep and help stakeholders work together more effectively.Learn how to create a customizable template in Asana. Get started today.