

OpsPilot

Project Charter — User Manual

Sponsor-Ready Project Initiation · PMI PMBOK 7 / ISO 21502 · AI Engineering Co-Pilot



AI-GENERATED CONTENT · INDEPENDENT VERIFICATION REQUIRED

This manual was produced with AI assistance and is only as good as the information it was given. Every statement, figure, standard reference and conclusion must be independently verified by a competent, suitably qualified person before it is relied upon. It is a draft aid to your judgement — not a finished, authoritative, or certifying document. Professional and legal responsibility for any reliance rests with you and your organisation. See the full Engineering Disclaimer at opsinnovatech.com/engineering-disclaimer.



What this guide covers — what a project charter is, how the OpsPilot module builds one, what to have ready, and the document you receive.

1. What is a project charter?

A project charter is the document that authorises a project to start and unlocks its funding — the agreed statement of why the project exists, what it will and won't deliver, who sponsors it, what success looks like, and the budget envelope. Its value is in pinning down, before work begins, the things that cause grief if left fuzzy: the scope boundary (what's out, not just what's in), the success criteria, and who actually has authority. A project that starts without a clear charter argues about its own scope for its entire life.

OpsPilot builds it to *PMI PMBOK 7 and ISO 21502, with AACE 17R-97 cost classification and Green Book alignment where applicable* — calculating the budget range, structuring SMART objectives and building the RACI.

2. What the OpsPilot module does

Role	Responsibility
 AI Coach (OpsPilot)	Builds a defensible charter — calculating budget ranges, structuring SMART objectives, building the RACI, and anchoring everything to lessons from real capital-project failures.
 Project Manager / Sponsor (you)	Provide the project context — strategic driver, scope intent, sponsor identity, stakeholder picture — and validate the structure and confirm the charter reflects sponsor intent.

3. How it works — the 12-section charter

#	Section
1	Executive summary
2	Strategic context and business driver
3	Project objectives and success criteria (SMART)
4	Scope — in and out

#	Section
5	Deliverables and milestones
6	Budget envelope and AACE cost classification
7	Governance, organisation, RACI
8	Risks, assumptions, dependencies
9–12	Stakeholders, approach, constraints, and authorisation

4. What you will be asked — have this ready

- The strategic driver — why the project exists.
- The scope intent — and, importantly, what's out of scope.
- The sponsor and the stakeholder picture.
- The rough budget and timeline basis (for the envelope and cost class).

5. What you receive — the output

A complete Project Charter (Word): the strategic context, SMART objectives and success criteria, the in/out scope, deliverables and milestones, the budget envelope with AACE class, the governance and RACI, the risks and assumptions, and the authorisation — the document that authorises start and unlocks funding.

6. Worked example (illustrative)

A charter for a reliability-improvement project. The strategic driver ties it to a downtime-reduction target. The objectives are made SMART — not “improve pump reliability” but “reduce unplanned pump downtime on the boiler-feed system by 30% within 12 months.” The scope is bounded explicitly: in scope is the feed-pump system; out of scope (stated, so it can't creep in) is the boiler itself. The budget envelope carries an AACE class so everyone knows how firm the number is, the RACI names who's responsible and who approves, and the sponsor signs. That clarity up front is what stops the project, six months in, arguing about whether the boiler work was ever included.

7. Getting the best result

- **State what's out of scope.** The out-of-scope list prevents more arguments than the in-scope one.
- **Make objectives SMART.** “Improve reliability” can't be judged; “30% in 12 months” can.
- **Class the budget.** An AACE class tells everyone how firm the number is before they rely on it.
- **Get the sponsor to sign.** The charter's authority comes from a real sponsor signature, not a template.

OpsPilot — AI Engineering Co-Pilot. Learn more at opsinnovatech.com