

PROJECT MANAGEMENT · FRAMEWORK WORKSHEET

The Creative Project Charter

A one-document alignment tool for the start of every project.
Define scope, success, roles, and risk before a single deliverable
gets made.

Why a charter?

A creative project charter is the single page everyone can point back to the client, the account lead, the creatives, the project manager when memory gets fuzzy about what was actually agreed.

It's not a contract, and it's not a creative brief. It sits between them: written after the intake call, before the kickoff meeting, and it answers one question — what does "done, and done well" actually look like for this project?

What this guide covers

- Project overview & stakeholders
- Objectives & success criteria
- Scope - in and out
- Deliverables & milestones
- Roles & decision rights
- Budget & resourcing
- Risks & assumptions
- Sign-off

How to use it

Fill this out with your internal team first, then walk through it with the client on a single call. Every open question becomes a line item, not a surprise in week three.

Keep it to one page per project once complete. If a section takes more than a paragraph to answer, the scope probably isn't settled yet.

Project Overview

The basics | who this is for, who's leading it, and when it needs to exist in the world.

PROJECT NAME

CLIENT / BRAND

PROJECT LEAD (STUDIO)

CLIENT POINT OF CONTACT

KICKOFF DATE

TARGET COMPLETION DATE

One-line project summary

If you can't say it in one sentence, the scope isn't defined yet.

Key stakeholders

NAME

ROLE

APPROVES / INFORMED

SECTION 02

Objectives & Success Criteria

What this project needs to achieve — and how everyone will know, objectively, that it did.

Primary business objective

Why does this project exist? What changes for the client if it succeeds?

Success criteria (make them measurable)

CRITERION

HOW IT'S MEASURED

What does NOT define success

Name the vanity metrics or side goals you're explicitly not optimizing for. This prevents scope drift later.

Scope

The most-skipped, most-important section. Write the "in" list first — then the "out" list will surface itself.

In Scope

☐☐☐☐☐

Out of Scope

☐☐☐☐☐

**Number of revision rounds included
PER DELIVERABLE**

COST PER ROUND BEYOND THAT

Deliverables & Milestones

Every deliverable, format, and the date it's due. If it's not on this table, it's not happening this project.

DELIVERABLE	FORMAT	OWNER	DUE	STATUS

Key milestones	
MILESTONE	DATE
Kickoff	
First concepts / draft due	
Client review round 1	
Final delivery	

Roles & Decision Rights

Name who does the work, who reviews it, and — critically — who has final sign-off. One name in that last column, always.

NAME	ROLE	RESPONSIBLE	CONSULTED	FINAL APPROVAL

Communication cadence
CHECK-IN FREQUENCY

PRIMARY CHANNEL

Feedback rules
TURNAROUND TIME FOR CLIENT FEEDBACK

FEEDBACK MUST BE CONSOLIDATED BY

Budget, Risks & Assumptions

What this costs, what could go wrong, and what you're taking on faith until told otherwise.

TOTAL BUDGET

PAYMENT SCHEDULE

WHAT'S INCLUDED

WHAT'S BILLED SEPARATELY

Top risks

RISK

LIKELIHOOD

MITIGATION

Assumptions

Things you're proceeding as if true — flag these explicitly so they can be corrected early, not discovered late.

Sign-Off

The charter is only useful if both sides agree it's accurate. Get signatures before work begins, not after the first deliverable ships.

This charter reflects the shared understanding of scope, deliverables, timeline, and budget for this project as of the date below. Any changes to the above require a written change order.

STUDIO REPRESENTATIVE — NAME & SIGNATURE

CLIENT REPRESENTATIVE — NAME & SIGNATURE

DATE

DATE

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