

PROJECT CHARTER

Juniper Vale FleetPulse Client Portal Pilot

Illustrative project charter sample

Sponsor	Elena Marrow, Juniper Vale Mobility
Project Lead	Fifty1 Consulting Program Lead
Version	1.0 — Sample
Date	2026-07-19
Target Completion	2026-09-25

1. Purpose and Business Need

Juniper Vale Mobility is preparing to pilot FleetPulse, a self-service portal for commercial fleet customers. The project coordinates portal readiness, security and quality validation, customer recruitment, onboarding, telemetry, and the operating cadence needed to launch the pilot and turn usage evidence into roadmap decisions.

Intended outcome: Launch a secure, measurable FleetPulse pilot that reduces manual service requests, improves customer visibility into fleet performance, and produces reliable evidence for the wider product rollout.

2. Objectives and Success Measures

Objective	Measure	Target	Owner
Complete the pilot-critical portal build	Priority customer journeys accepted	100% by 2026-08-28	Product Lead
Establish launch quality	Open P0/P1 defects	0 at go-live	Engineering Lead
Recruit the customer pilot group	Accepted testers	12 qualified fleet customers	Customer Success Lead
Drive meaningful practice	Customers completing ≥1 insight review in week 1	≥60%	Program Lead
Capture actionable feedback	Active customers submitting structured feedback	≥40% by week 2	Research Lead

3. Scope Boundaries

Boundary	Definition
In Scope	Fleet dashboard; vehicle-health and efficiency insights; role-based access; pilot customer recruitment; onboarding communications; telemetry instrumentation; feedback cadence; launch support.
Out of Scope	Public commercial launch; automated billing; native mobile application; multilingual support; predictive maintenance recommendations; expansion outside the pilot region.

4. Major Deliverables

Deliverable	Description	Acceptance Criteria	Owner
Pilot-ready portal build	Approved portal experience and priority customer journeys	UAT passed; zero open P0/P1 defects	Product + Engineering
Pilot customer recruitment	Account selection, eligibility review, participation agreement, and reserve list	12 accepted customers plus 25% reserve list	Growth
Customer onboarding pack	Welcome email, participation expectations, access instructions, portal guide, and support route	Dry run completed with internal reviewer	Program Lead
Measurement framework	Events, funnel definitions, dashboards, and feedback taxonomy	All pilot KPIs traceable to source events	Analytics
Operating cadence	Twice-weekly triage, weekly readout, escalation route, and decision log	Owners and calendar confirmed	Program Lead

5. Milestones

Milestone	Target Date	Exit Criteria
Scope and success measures approved	2026-07-24	Sponsor approval recorded
Portal feature complete	2026-08-21	Code complete; test environment available
UAT and instrumentation sign-off	2026-08-28	Exit criteria met; launch risks accepted
Pilot customer acceptance complete	2026-09-04	12 accepted; account list verified
FleetPulse pilot launch	2026-09-14	Customer access released; support coverage active
Two-week learning review	2026-09-25	KPI readout and prioritized decisions published

6. Governance and Decision Rights

Role	Named Owner	Authority and Accountability
Executive Sponsor	Elena Marrow	Approves charter, material scope changes, launch decision, and risk acceptance.
Program Lead	Fifty1 Consulting Program Lead	Owns integrated plan, reporting, dependency management, and escalation.

PROJECT CHARTER

Role	Named Owner	Authority and Accountability
Product Lead	Juniper Vale Product	Owns requirements, acceptance criteria, and product decisions.
Engineering Lead	Juniper Vale Engineering	Owns technical delivery, environments, quality, and incident response.
Customer Success Lead	Juniper Vale Customer Success	Owns tester pipeline, communication, and onboarding conversion.

7. Stakeholder Strategy

Stakeholder	Interest / Impact	Engagement Approach	Owner
Pilot customers	High impact; direct portal users	Clear expectations, weekly office hours, low-friction feedback	Program Lead
Juniper Vale executive team	Accountable for investment, risk acceptance, and go/no-go	Weekly concise readout; decisions escalated within 24 hours	Program Lead
Product and engineering	Primary delivery team	Twice-weekly execution and defect triage	Product Lead
Customer success managers	Internal users affected by the new service model	Use anonymized insights to refine messaging	Customer Success Lead

8. Planning Conditions

Assumptions

- The portal build remains limited to pilot-critical journeys and does not expand into a complete platform redesign.
- Product, engineering, customer-success, and data owners can support twice-weekly execution checkpoints during the final four weeks.
- Selected customers will receive pilot access and dedicated support in exchange for structured participation.

Constraints

- Small cross-functional team with shared responsibilities outside the project.
- Launch date may move if any P0/P1 defect or scoring-integrity concern remains unresolved.
- Fifty1 provides program leadership; Juniper Vale Mobility owns the customer-facing FleetPulse brand and all product decisions.

Dependencies

- Final UI designs and acceptance criteria before feature-complete testing.
- Reliable analytics events before recruitment communications are released.
- Identity, customer-account mapping, and access provisioning before pilot acceptance.
- Contract-compliant handling of customer feedback, vehicle telemetry, and account data.

9. Initial Risk Position

ID	Risk	P	I	Response	Owner
----	------	---	---	----------	-------

PROJECT CHARTER

ID	Risk	P	I	Response	Owner
R-001	Pilot customer recruitment does not reach the target, reducing the validity of adoption and service-impact findings.	4	4	Invite priority accounts early; maintain a 25% reserve list; use customer-success outreach.	Customer Success Lead
R-002	Portal regressions delay UAT or create an unstable customer experience.	3	5	Freeze pilot-critical scope; regression checklist; daily defect review during UAT.	Engineering Lead
R-003	Fleet efficiency calculations vary from source telemetry or approved business rules.	3	5	Reconcile benchmark vehicles; variance review; escalation threshold for calculation anomalies.	Product Lead
R-004	Analytics gaps prevent accurate funnel and engagement reporting.	3	3	Instrumentation map; event QA in staging; manual fallback tracking for launch week.	Data Lead

10. Resources and Budget

Category	Commitment
People	Program lead; product lead; engineering lead and contributors; customer-success lead; data and telemetry support; UX/research support.
Technology	FleetPulse portal and staging environment; analytics platform; email automation; defect tracker; shared project repository.
Budget	Illustrative sample: operate within approved product-development budget; sponsor approval required for incremental vendor spend over \$1,000.

11. Change Control and Reporting

Change control. The Program Lead records every material request in the change log. Product and engineering assess scope, effort, risk, and schedule impact. The sponsor approves changes affecting launch date, success measures, budget threshold, or agreed in/out-of-scope boundaries.

Reporting and escalation. The team holds two execution checkpoints per week and publishes a weekly RAG status report. P0/P1 defects, launch-date threats, privacy concerns, and unresolved calculation-integrity issues are escalated to the sponsor within 24 hours. The workbook included in this kit is the control log source of truth.

12. Approval

Approval confirms authorization to proceed within the scope, constraints, and governance defined in this charter.

Role	Name	Approval	Date
Executive Sponsor	Elena Marrow	Approved for illustrative sample	2026-07-19
Program Lead	Fifty1 Consulting Program Lead	Prepared	2026-07-19
Product Lead	Juniper Vale Product	Pending	—