**REAL ESTATE SIX SIGMA PROJECT CHARTER**

**TEMPLATE EXAMPLE**

IMPORTANT REMINDER

A narrative written charter must be circulated and signed by the project sponsors. You can attach a completed version of this template to your narrative written charter to keep the charter short and concise.

Please make sure you meet with the project team and sponsors before completing this template. Much of the information required will need to come from a discussion with team members and sponsors.

GENERAL PROJECT INFORMATION

|  |  |  |
| --- | --- | --- |
| PROJECT NAME | PROJECT MANAGER | PROJECT SPONSOR |
|  Standardize Client Onboarding Paperwork |   |   |
| EMAIL | PHONE | ORGANIZATIONAL UNIT |
|   | 000-000-0000 |   |
| GREEN BELTS ASSIGNED |   |   | EXPECTED START DATE | EXPECTED COMPLETION DATE |
|   | 00/00/0000 | 00/00/0000 |
| BLACK BELTS ASSIGNED |   |   | EXPECTED SAVINGS | ESTIMATED COSTS |
|   | $237,750 | $184,900 |

PROJECT OVERVIEW

|  |  |
| --- | --- |
| PROBLEM OR ISSUE  | In the past two years, our competitors have moved all housing operations online. As a result, we are losing both returning and future customers. For agents with limited online transaction capability, the repeat customer rate has decreased by 20 percent over the past four years. Referral traffic has decreased by 28 percent for those same agents. Agents who obtain all contract onboarding signatures online are maintaining or growing their client base. |
| PURPOSE OF PROJECT | We aim to standardize client onboarding methods. |
| BUSINESS CASE | Our real estate agency has a successful system in place for closing deals online, but many of our agents still use physical forms for onboarding new clients. The lack of consistent technology is frustrating for clients and works against our image as a modern real-estate agency that can “buy and sell homes from any location in the country.” We need to implement online contracting software, train current agents, and develop a consistent protocol for onboarding clients. |
| GOALS / METRICS | By the end of 2032, we will implement software for signing all onboarding documents and develop a training protocol to update current agents. By January 2033, 100 percent of agents will be capable of conducting every business interaction with clients online. |
| EXPECTED DELIVERABLES |  |

PROJECT SCOPE

|  |  |
| --- | --- |
| WITHIN SCOPE | Onboarding client contracts |
| OUTSIDE OF SCOPE | Closing contracts |

TENTATIVE SCHEDULE

|  |  |  |
| --- | --- | --- |
| **KEY MILESTONE** | **START** | **FINISH** |
| Form Project Team and Conduct Preliminary Review |  |  |
| Finalize Project Plan and Project Charter |  |  |
| Conduct Definition Phase |  |  |
| Conduct Measurement Phase |  |  |
| Conduct Analysis Phase |  |  |
| Conduct Improvement Phase |  |  |
| Conduct Control Phase |  |  |
| Close Out Project and Write Summary Report |  |  |

RESOURCES

|  |  |
| --- | --- |
| PROJECT TEAM |   |
| SUPPORT RESOURCES |   |
| SPECIAL NEEDS |   |

COSTS

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **COST TYPE** | **VENDOR / LABOR NAMES** | **RATE** | **QTY** | **AMOUNT** |
| **Labor** |   | $150.00 | 200 |  $ 30,000.00  |
| **Labor** |   | $200.00 | 100 |  $ 20,000.00  |
| **Labor** |   | $350.00 | 50 |  $ 17,500.00  |
| **Labor** |   | $85,000.00 | 1 |  $ 85,000.00  |
| **Labor** |   | $4,850.00 | 3 |  $ 14,550.00  |
| **Supplies** |   | $17,850.00 | 1 |  $ 17,850.00  |
|   |   |   | TOTAL COSTS |  $ 184,900.00  |

BENEFITS AND CUSTOMERS

|  |  |
| --- | --- |
| PROCESS OWNER |   |
| KEY STAKEHOLDERS |   |
| FINAL CUSTOMER |   |
| EXPECTED BENEFITS |   |

|  |  |  |
| --- | --- | --- |
| **TYPE OF BENEFIT** | **BASIS OF ESTIMATE** | **ESTIMATED BENEFIT AMOUNT** |
| **Specific Cost Savings** |   |  $ 25,000.00  |
| **Enhanced Revenues** |   |  $ 92,500.00  |
| **Higher Productivity (Soft)** |   |  $ 17,500.00  |
| **Improved Compliance** |   |  $ 12,000.00  |
| **Better Decision Making** |   |  $ 18,500.00  |
| **Lower Maintenance Costs** |   |  $ 26,000.00  |
| **Fewer Miscellaneous Costs** |   |  $ 46,250.00  |
|   |   |   | TOTAL BENEFIT |  $ 237,750.00  |

RISKS, CONSTRAINTS, AND ASSUMPTIONS

|  |  |
| --- | --- |
| RISKS |   |
| CONSTRAINTS |   |
| ASSUMPTIONS |   |

|  |  |  |
| --- | --- | --- |
| PREPARED BY | TITLE | DATE |
|   |   |   |

|  |
| --- |
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