

Project Charter and Project Brief

ABC Investment LLC focuses on high-end investors with a portfolio value greater than \$400K. The investment market is highly competitive, and the organization wants to capture new potential investors before they seek services elsewhere. The event schedule is set, and the CEO will be attending. You have been assigned as the project manager to oversee the company's annual investor dinner. It is 1 March today. The event will occur between 5:00 PM and 9:00 PM on 30 June. You have a budget of \$14,000 for the event.

Charter Item	Comments
Project Name	2025 Annual New Investor Dinner – June 30
Project Goal	The goal of the project is to plan and host an enjoyable ABC Investment LLC dinner for new potential investors.
Project Value Proposition and Benefits	- Benefits of the dinner include: - potential revenue from each new investor (expected average of \$12,000 revenue per investor) - networking and relationship building between the team and new investors - Beneficial information shared through presentations - Enjoyable time and meal shared between the team and new investors - Stand out from competing investment firms by hosting this entertaining dinner
Problem or Opportunity Statement	The project should start now, as the investment market is highly competitive. We would have 4 full months to prepare for the June 30th event. We must ensure appropriate time is given to send and receive RSVPs, plan the catering for the dinner, and coordinate with speakers to prepare presentations.
Project Schedule	- Planning Stage – beginning March 1 - May 31 - Find a contact restaurant (moderately upscale menu); ensure adequate parking at no cost for participants - Send invitations to 30 potential investors (tracking RSVPs March 16 – June 1) - Build event agenda - Consider IT and AV requirements - Create marketing plan with marketing team for day-of-event, including demographics, the team, and investment opportunities - Reach out to team for event speakers - Implementing Stage - DUE June 1 - Finalize RSVP list - Finalize marketing plan and efforts for day-of-event - Finalize speakers - DUE June 7 - Plan catering and diet accommodations based off of RSVPs - DUE June 23 - Reach out to core planning team members to finalize all preparation work Day of Event: June 30 - Follow-up Stage - Marketing reaches out to investors (Thank you message, means of communication for future business)

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	○ Core Team meeting, discussion on feedback and Areas of Improvement, Project Closure
Project Manager	Antonio Gonzalez
Approval Authority/Sponsor	Sponsor and COO: Martha Wilson
Assumptions or Constraints	Assumptions: ● All invitees will attend. ● Approximately 70% of attendees will seek services from ABC ● Restaurant can accommodate needs ● IT and AV support are internally available Constraints: ● Budget \$14,000 ● Abide by legal and regulatory guidelines ● June 30th, 2025 has been set for the event ● Restaurant must support attendee numbers and parking requirements
Proposed Solution(s)	Carefully plan the event, execute the event according to plan and procedure, perform follow up actions
Project Priorities	1. Schedule: hard set date of June 30, 2025 2. Budget: \$14,000 3. Project Scope: Semi-flexible. Create the best environment possible for the potential investors
Return on Investment (ROI)	Cost: \$14,000 Revenue: $22 \times \\$12,000 = \\$264,000$
Risks (Potential)	● RSVP'd attendees do not show up to event - reduction in revenue ● Restaurant issues - investors not happy about food or environment ● Cost Overruns - reduced return on investment ● IT or AV issues - presentation effectiveness reduced
Resources Required	● Core project team members ● IT and AV support ● Event Speakers ● Finance Manager ● Vendor Manager ● Contracting

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Project Details	Project Brief
Project Name	ABC Investments annual new investor dinner
Project Manager	Antonio Gonzalez
Project Purpose	Attract new potential investors to make business with ABC Investments
Project Benefits	• Presentations ABC's investment portfolio to the potential investors • Increase customer base, potentially bringing in \$12,000 in revenue from each investor • Continue smart and effective competition.
Project Schedule	Planning starts: March 1, 2025 Event date: June 30, 2025
Project Costs	\$14,000
Project Sponsor	Sponsor and COO: Martha Wilson