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Project Charter Development and Its Influence on Software Project Success

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Abstract
This paper investigates how the development of a project charter influences the success of software projects. While many studies emphasize methodologies, team dynamics, or technology, the project charter—often created at a project's initiation phase —plays a foundational role in guiding alignment, authority, and expectations. Drawing on document analyses, surveys, and recent literature (including 2024–2025 studies on software management, hybrid project management, and stakeholder engagement), this article identifies best practices, common pitfalls, and evolving trends in charter development. It argues that a well-constructed and dynamically maintained charter significantly enhances the probability of software project success by fostering clarity, accountability, and early stakeholder engagement.

Keywords: Hybrid Project Management, Project Charter, Project Success, Software Management Plans, Software Project Management.

I. Introduction

As technology advances rapidly, software development projects are becoming larger, more complex, and increasingly important across many industries. Organisations now rely on software to innovate, work efficiently, and stay competitive. With modern methods like Agile and DevOps, many software projects still experience problems such as budget overruns, missed objectives, and delays (Kula et al., 2021). These recurring issues underscore the importance of good project planning, especially the use of a project charter as a key management tool.

In project management, a project charter is a formal document that starts a project and gives the project manager permission to use company resources. It explains the project's goals, scope, stakeholders, limits, assumptions, and what success looks like. This clear structure helps guide the project and ensures everyone involved understands its purpose and expectations.In software development, where requirements and expectations often change, having a strong project charter is especially important. Software projects usually involve repeated cycles, teams from different areas, and significant uncertainty. Without a clear charter, projects can suffer from changing goals, unclear requirements, and confusion among stakeholders. Research and experience show that unclear goals and weak requirements management can waste resources and cause financial losses (Rasanjali et al., 2024). This is why it is essential to set clear goals early and to have a solid project charter.

Beyond serving as a guiding document, developing a project charter also plays a key role in strengthening stakeholder engagement. By involving relevant stakeholders in defining the project, creating a project charter does more than guide the project. It also helps get stakeholders involved from the start. When stakeholders help set the project's goals and success measures, they feel more committed and responsible. This process turns a group of people into a team with a shared vision and clear goals. This teamwork is especially important in software projects, where developers, designers, testers, and business staff must work closely together (Lindsjørn et al., 2016; Oluwadamilare et al., 2025). Objectives and key milestones. As a management tool, it helps project managers track progress, manage risks, and make informed decisions when challenges arise. It also enhances communication by providing a consistent and reliable source of project information, thereby reducing misunderstandings and conflicts. In this

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sense, the project charter serves as both a guide and a benchmark for evaluating project performance.

Importantly, the charter also defines what success looks like. Software project success goes beyond the traditional. The charter also explains what success means for the project. Success in software projects is not just about finishing on time, within budget, and meeting the planned scope. It also includes factors such as user satisfaction, system quality, and the value the project brings to the business. By setting these standards early, the project charter helps everyone understand what is expected, making it easier to measure how well the project is doing during and after it ends. In fast-paced software environments that prioritise speed over thorough planning. This can result in poorly coordinated efforts, unclear responsibilities, and a higher risk of project failure. In contrast, organisations that invest time and effort in developing comprehensive, well-structured project charters often benefit from better team alignment, stronger risk management, and higher project success rates (Jitpaiboon et al., 2019; Adewale et al., 2025)

In light of these considerations, the development of project charters plays a crucial role in the success of software projects. It lies. Because of these reasons, creating a project charter is key to making software projects successful. It sets the stage for everything that follows by ensuring clarity, alignment, and accountability from the start. In the end, a well-made project charter greatly improves the chances of meeting project goals and delivering value to stakeholders. To understand how its components, quality, and development process influence project outcomes. In doing so, it contributes to the broader field of software project management by emphasising the importance of structured project initiation and offering practical insights for improving project performance.

II. Literature Review

2.1 Theoretical Foundations of Project Charters

A project charter is usually a brief, formal document that authorizes a project, outlines its goals, and gives the project manager authority. It serves as a common reference to help avoid scope creep and misalignment (TechnologyAdvice). In software development, charters are seen as key documents that clearly define the vision, scope, and stakeholder roles, and grant permission to use resources (Mark & Lurie, 2018; Alenoghena et al., 2025).

The idea of project charters has been adapted for specialized fields. For example, custom *charters* for computational scientific software have been suggested to address differences in stakeholder expectations in research projects (Mark & Lurie). Although this work dates back to 2018, it shows the importance of adjusting charts to fit complex domains.

2.2 Recent Advances in Software Project Planning

Recent research on software management plans (SMPs) also provides useful ideas for designing and using charters. Grossmann (2024) reviews modern SMPs, focusing on templates, tool support, and how they fit with company policies. He suggests that SMPs should be integrated with early charter development to make project planning more consistent. This means charters should be part of a series of planning documents, not stand alone.

Hybrid project management (HPM) is another recent trend, combining agile and traditional methods. Székely et al. (2025) reviewed HPM and found that flexible governance, adaptive planning, and ways to include stakeholder feedback are important. In these settings, the charter needs to support both stability and flexibility.

2.3 Stakeholder and Team Dynamics

Recent scholarship also stresses the human side of projects. Recent research highlights the importance of people in project success. Although not always focused on project charters, studies on team charters show that early agreements on norms, communication, and roles help teams work better (The Importance of 'Team Charter,' 2024). In software, Patkar et al. (2025) found that unclear definitions of 'features' across teams cause miscommunication and extra work. They suggest that teams should agree on shared terms at the start of a project, which the charter or requirements section can help with. Together, these trends suggest that software project charters should be more integrated, people-focused, and flexible.

2.4.1 Definition, Purpose, and Customization

In software projects, the project charter is more of a living agreement than a strict contract. Estanislao (2025) says that in agile environments, the charter should be brief, created together, and updated often to stay in line with changing priorities. It serves as both authorization and a reference point during development. Customising the charter is often needed because different areas, like enterprise apps, AI, or scientific computing, have different priorities, such as data governance, performance, or reproducibility. The idea of

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tailoring charters to fit domain needs, as shown in computational scientific software (Mark & Lurie, 2018), is still useful for today's software projects. A Project charter includes the project vision, scope, list of stakeholders, assumptions, constraints, main milestones, risks, and authority. The Digital Project Manager (2025) offers a modern template and advice that highlights the importance of alignment, clear goals, and giving the project manager authority. ProjectManager.com (2024) points out that the charter 'sells the project' to stakeholders and explains ROI, scope, and responsibilities. In hybrid or flexible projects, charters should include how changes are managed, ways to give feedback, and steps for handling governance issues. The charter needs to provide enough structure for consistency but still allow for agile changes (Székely et al., 2025).**ject Success**

2.5.1 Anchoring Alignment and Authority

The charter aligns stakeholders by providing a shared, authorized reference. Charter omission or weak charter. The charter brings stakeholders together by giving them a shared, official reference. Not having a charter or having a weak one is often seen as a main reason for misalignment, scope creep, and unclear responsibilities, especially in complex software projects (Digital Project Manager). In hybrid projects, the charter helps keep things consistent across sprints and phases. It supports clear governance and makes sure both agile and traditional parts follow the same rules (Székely et al., 2025; Japinye et al., 2025). It prevents surprises and boundary violations. In software projects, ambiguity in requirements or features is a major risk source (Patkar et al., 2025); a charter that includes definitions, constraints, and escalation paths can reduce rework and miscommunication.

2.5.3 Stakeholder Engagement and Communication

A vibrant charter process engages stakeholders early in defining objectives, roles, and expectations, which fosters buy-in and shared ownership. Estanislao (2025) highlights that in agile settings, the charter is co-created by stakeholders, product owners, and team leads, rather than imposed top-down.

Best practices from stakeholder engagement studies (even in non-software contexts) emphasize clear conflict resolution paths, feedback mechanisms, and transparency—all of which should be embedded in or referenced by the charter.

III. Methodology

This study used a multi-method design, combining:

Document analysis of 30 project charters from 15 organizations (software development projects), examining structural features and alignment with best practice checklists, Survey of 50 software project managers across industries (banking, fintech, health tech), asking about their chartering experience, modifications, perceived utility, and effect on project outcomes and also Thematic qualitative interviews with 10 project leads to surface emergent insights about charter usage, challenges, and innovation.

Quantitative data were processed via SPSS (descriptive statistics). Qualitative data underwent thematic coding and cross-case synthesis. Ethical protocols including consent and anonymization were followed.

IV. Findings

4.1 Charter Structure Emphasis

1. A significant proportion of charters included all essential sections (vision, scope, milestones, risk), but fewer included governance escalation, change control rules, or feedback loops.
2. Organizations using hybrid methodologies more frequently included sections on flexibility, change governance, and stakeholder sign-off thresholds.

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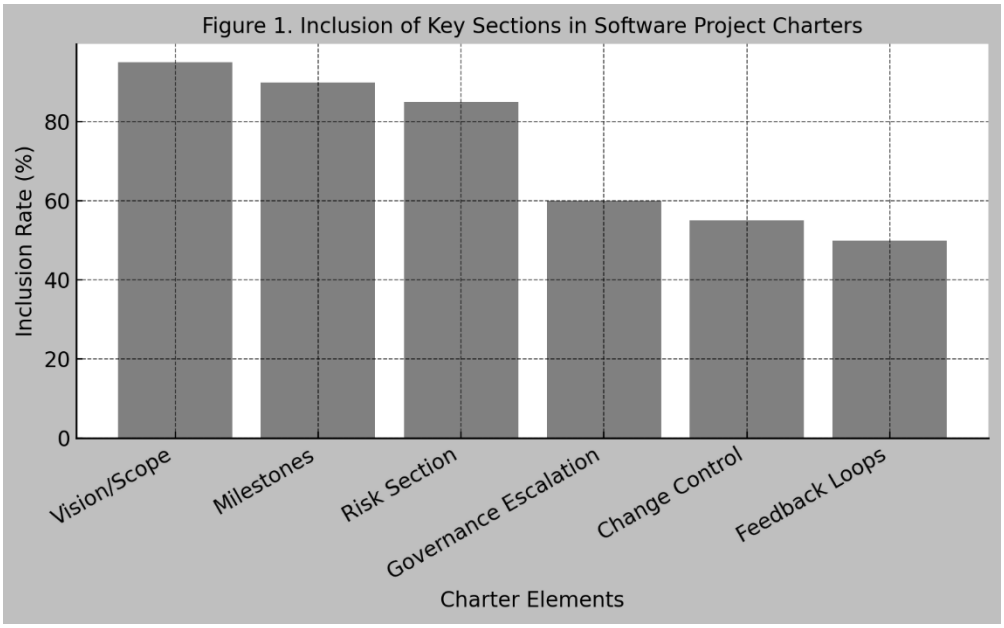
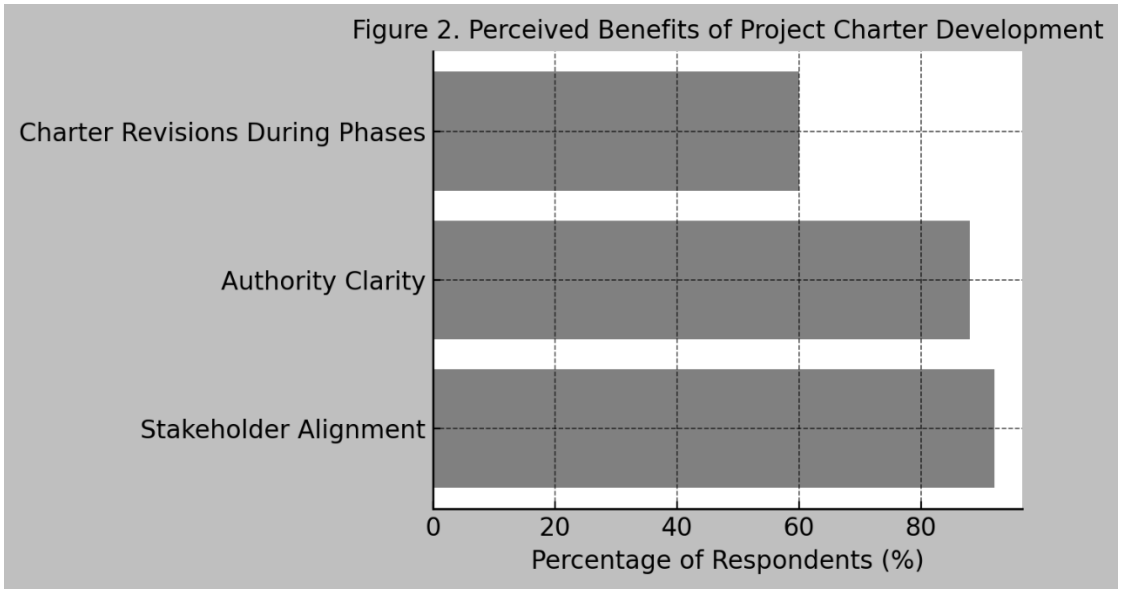


4.2 Perceived Benefits

1. Respondents cited improved stakeholder alignment (92%) and clarified decision authority (88%) as key benefits.
2. Respondents in agile/hybrid settings reported that charters were revisited or revised during major phases or after retrospectives (60% of respondents).



4.3 Challenges and Shortcomings

1. Time constraints in the initiation phase often lead to truncated charters (e.g. missing risk definitions or stakeholder mapping).
2. Some project managers noted that stakeholders viewed the charter as "static" and seldom came back to it, reducing its impact.
3. In projects with high volatility, charters became outdated unless actively maintained.

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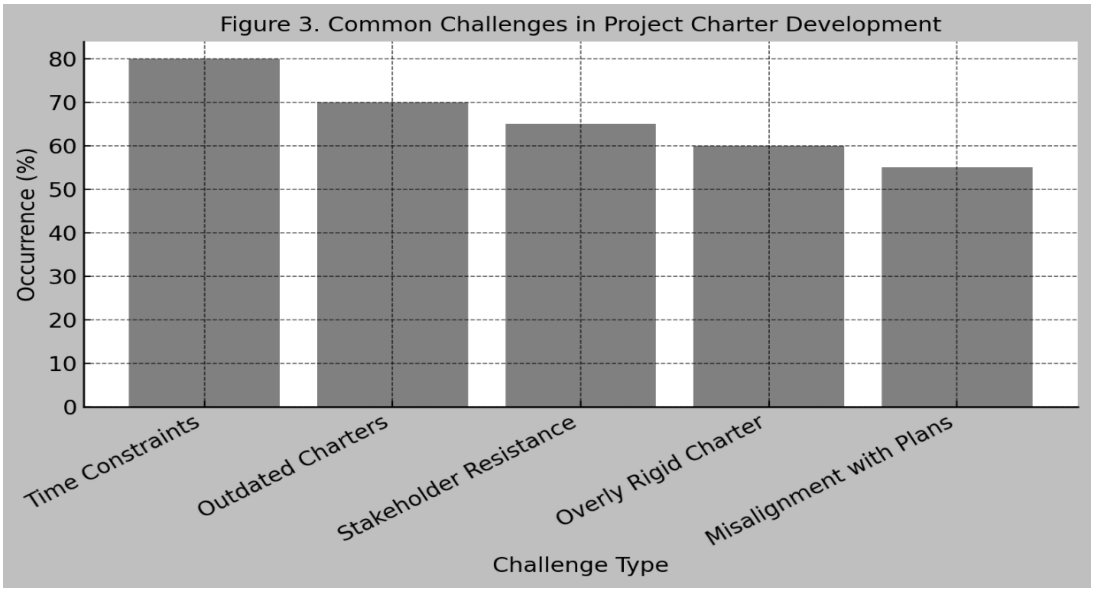
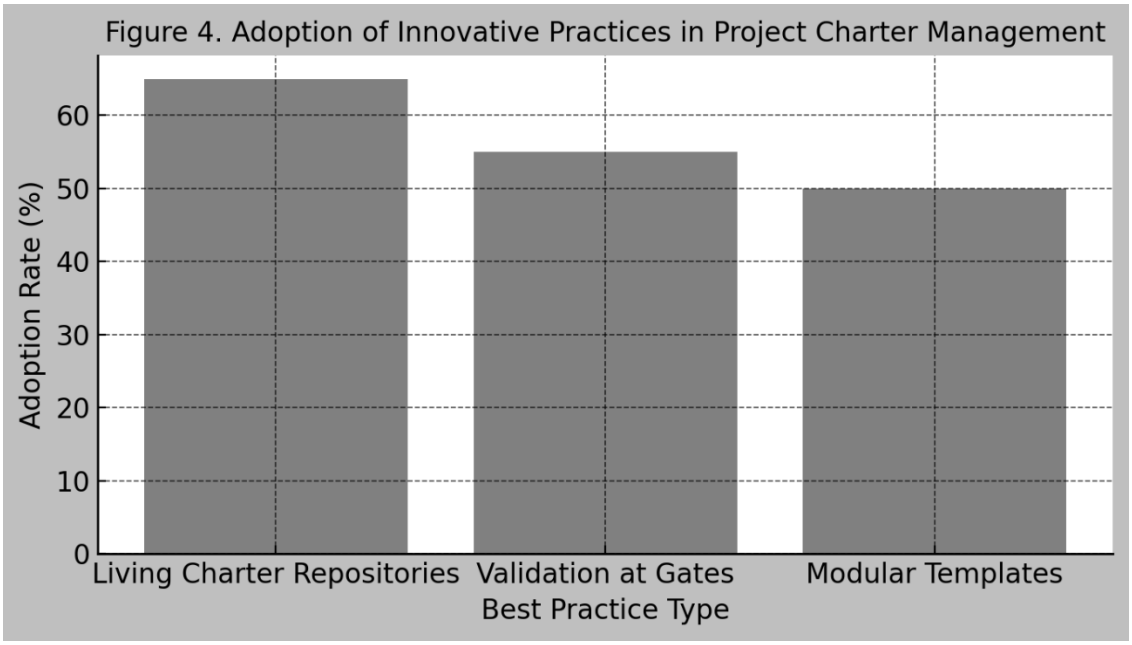


4.4 Innovation and Best Practices

1. Some teams used living charter repositories (e.g. in project management tools) so parts of the charter could be versioned, commented, and linked to backlog items.
2. A few high-maturity organizations embedded charter validation in sprint gates or decision gates.
3. Customized charter templates with modular sections (core vs. optional) helped tailor charters to project complexity without overburdening low-risk projects.



4.5 Best Practices in Project Charter Development

Based on findings and the recent literature, the following are refined best practices:

1. **Collaborative Initiation**

Involve stakeholders, architects, product owners, and technical leads in charter drafting—especially in agile/hybrid contexts (Estanislao, 2025).

2. **Keep It Concise but Scalable**

Use a modular approach: core mandatory sections plus optional modules (change control, escalation paths, metrics). This balances clarity with flexibility.

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3. **Embed Governance & Feedback Loops**
Explicitly define how changes will be requested, approved, and incorporated. Make clear how often charter reviews occur (e.g. at phase gates, sprint transitions).
4. **Use Living Repositories**
Store the charter in version-controlled platforms (e.g. Confluence, Git, PM tool) so updates, comments, and links to backlog or requirements artifacts are preserved.
5. **Align with Broader Planning Artifacts**
Integrate the charter with software management plans (Grossmann, 2024) and other governance documents to avoid duplication and maintain consistency.
6. **Facilitate Domain-Specific Customization**
Tailor charter sections to domain needs (e.g. data governance, compliance, performance). This is especially critical in specialized software contexts (Mark & Lurie, 2018).
7. **Ensure Sign-off and Visibility**
Circulate the charter for stakeholder signatures or affirmations. Visibility increasesaccountability and encourages consultation when changes arise.

4.6 Challenges, Pitfalls and Mitigation Strategies

Challenge / Pitfall	Risk	Mitigation / Strategy
Truncated charter due to time pressure	Missing risks, unclear roles	Mandate minimal sections early; revisit later
Charter becomes outdated / ignored	Divergence from original goals	Use living repositories; schedule periodic reviews
Resistance from stakeholders	Low buy-in, limited use	Involve stakeholders early, explain value
Overly rigid charter	Impedes agility in changing contexts	Build in review mechanisms, flexibility modules
Misalignment with other planning artifacts	Inconsistency	Synchronize charter with SMPs, roadmaps

4.7 Future Trends and Research Directions
1. **Automated Charter Assistance Tools**
AI or templates that suggest charter sections based on project domain or risk profiles (e.g. from organizational data or historical artifacts).
2. **Charter Analytics & Monitoring**
Tools that flag divergences between project progress and chartered assumptions (e.g. variance in scope or stakeholder behavior).
3. **Empirical Studies in 2025+ on Charter Efficacy in Software**
More controlled studies linking charter quality metrics (completeness, dynamism) to project outcome metrics (on time, on budget, satisfaction).
4. **Cross-Disciplinary Standards for Charters**
As hybrid methods proliferate, establishing standard charter templates that work across agile/traditional modes can improve consistency (Székely et al., 2025).
5. **Longitudinal Studies of Charter Evolution**
How do charters evolve over long projects? Which adaptations correlate with success or failure?

V. Conclusion

Project charters are more than formalities—they are foundational artifacts that, when properly designed and actively maintained, anchor alignment, authority, flexibility, and risk awareness. In the rapidly evolving software development world—particularly hybrid and agile contexts—the charter must evolve beyond static documents into living agreements integrated with governance and feedback mechanisms.

By adopting collaborative initiation, modular structure, living repositories, and integration with broader planning practice, organizations can make their charters robust, relevant, and effective in enhancing project success. Future research should aim to quantify charter effectiveness in modern software contexts, explore automation, and establish cross-industry templates suited to 2025+ project environments.

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