



PROJECT CHARTER

SAGE Business Cloud ERP Rollout Implementation

Project Name: SAGE Business Cloud ERP Implementation

Company: MDY Mart Ventures Ltd

Project Manager: Evidence Omobude

Charter Date: 01 November 2025

Charter Version: 1.0

1. EXECUTIVE SUMMARY

MDY Mart Ventures Ltd is implementing SAGE Business Cloud ERP across all branches to achieve operational excellence and digital transformation. This charter authorizes the Wave 2 implementation for Uyo branch, establishing the foundation for standardized processes, integrated operations, and data-driven decision-making across Rivers, Akwa Ibom, Imo, Abia states, and future international locations including Kigali, Rwanda.

2. BUSINESS CASE & STRATEGIC OBJECTIVES

Strategic Change Objective

Transform MDY Mart Ventures into a digitally enabled, data-driven FMCG distributor through unified ERP platform implementation.

Key Business Drivers

- **Process Standardization:** Unified operations across all branches and upcoming international locations
- **System Integration:** Connect Finance, Procurement, Sales, and Inventory on single digital platform
- **Enhanced Visibility:** Real-time insights into business performance and operations
- **Data Accuracy:** Enable confident, data-driven decision-making
- **Scalability:** Prepare infrastructure for growth and future expansions
- **Competitive Advantage:** Position company for regional and international market competitiveness

Expected Business Benefits

- **Operational Efficiency:** Reduce manual tasks, errors, and operational delays through automation
- **Financial ROI:** Quantifiable time and cost savings from process automation
- **Improved Decision-Making:** Single source of truth for financial and operational data
- **Enhanced Customer Service:** Faster order processing and better demand forecasting
- **Inventory Optimization:** Better visibility and supply chain management
- **Regulatory Compliance:** Meet legal and fiscal requirements across Nigeria and Rwanda

3. PROJECT SCOPE

In Scope

- Wave 2 rollout: Uyo branch implementation
- Core modules: Finance, Procurement, Sales, and Inventory
- Master and transactional data migration from legacy systems
- Business process alignment with global SAGE ERP template
- Fit-to-Standard workshops and configuration
- End-to-end system testing and validation
- Train-the-Trainer model implementation
- User training for key users and super users
- Go-Live execution and post-implementation support
- Documentation and knowledge transfer

Out of Scope

- Other branch implementations (covered in subsequent waves)
- Custom module development beyond SAGE standard functionality
- Legacy system decommissioning (separate project)
- Hardware procurement (managed separately)
- Third-party integrations not defined in requirements

Project Boundaries

- **Geographic:** Uyo branch (Wave 2)
- **Functional:** Finance, Procurement, Sales, Inventory modules
- **Timeline:** 1 Nov 2025 to 29 December 2025

4. PROJECT OBJECTIVES & SUCCESS CRITERIA

SMART Goals

Specific: Successfully implement SAGE Business Cloud ERP at Uyo branch with full integration of Finance, Procurement, Sales, and Inventory modules.

Measurable:

- 100% migration of approved master and transactional data objects
- 100% of key users and super users trained and certified
- System uptime of 99.5% post Go-Live
- Zero critical defects at Go-Live
- User adoption rate of 95% within 30 days post Go-Live

Achievable: Leveraging experienced consultants, structured change management, and proven implementation methodology.

Relevant: Directly aligns with MDY Mart's strategic growth and digital transformation goals.

Time-Bound: Complete Uyo rollout within 8 weeks as per project wave schedule.

Success Criteria

- Successful Go-Live with no business disruption
- All critical business processes operational in SAGE ERP
- Data accuracy validation completed with stakeholder sign-off

- User acceptance testing (UAT) passed with >95% success rate
- Post-implementation support stabilization within 4 weeks
- Stakeholder satisfaction score of 4/5 or higher

5. PROJECT APPROACH & METHODOLOGY

Implementation Framework

The project follows a structured, phase-based approach:

1. DISCOVER

- a. Understand current processes and workflows
- b. Identify local business requirements and pain points
- c. Document as-is state and gap analysis

2. PREPARE & EXPLORE

- a. Conduct Fit-to-Standard workshops
- b. Align local practices with global SAGE template
- c. Define customization and configuration requirements
- d. Develop training strategy

3. REALIZE

- a. Configure SAGE ERP based on approved requirements
- b. Develop test scenarios and scripts
- c. Validate solutions through iterative testing cycles
- d. Prepare data migration scripts

4. DEPLOY

- a. Execute data migration and validation
- b. Conduct Train-the-Trainer sessions
- c. Perform end-to-end system testing

- d. Complete user acceptance testing (UAT)
- e. Finalize Go-Live readiness assessment

5. Launch & GO-LIVE

- a. Transition to production environment
- b. Execute Go-Live support plan
- c. Monitor system performance and user adoption
- d. Provide hyper-care support
- e. Capture lessons learned

6. System Evaluation (Review & Closure)

- a. Performance Review & Optimization
- b. Client Feedback & Enhancement Review
- c. Final Documentation & Knowledge Transfer
- d. Project Closure & Final Sign-off

Project Management Approach

- Agile-hybrid methodology with structured phase gates
- Weekly steering committee meetings
- Bi-weekly sprint reviews and planning
- Daily stand-ups for project team
- Risk and issue management through RAID log
- Change management through formal change control process

6. STAKEHOLDERS & GOVERNANCE

Project Sponsor

Executive Sponsor responsible for overall project authorization, strategic direction, and business accountability.

Project Board Members

- Board Member – Finance
- Board Member – Operations
- Board Member – Business Strategy
- Finance Director (CFO)

Board Responsibilities: Strategic direction, major decision approvals, resource allocation, risk escalation resolution

Project Team Structure

Role	Key Responsibilities
Project Manager	Plan, organize, oversee project delivery; ensure on-time, on-budget completion; stakeholder management
Assistant Project Manager	Support PM in planning, execution, and completion; coordinate workstreams
Product Owner – Data & System Administration	Data governance, system administration strategy, data accuracy and compliance
Product Owner - Finance	Finance system requirements, ERP finance functionality, reporting and compliance

Product Owner - Logistics (Procurement, Sales, Operations)	Logistics systems vision, procurement/inventory/distribution processes
Product Owner - Training & QA Manager	Training solution development, quality assurance, user adoption
Lead Business Analyst - Finance & Data	Finance and data process analysis, requirements gathering, solution validation
Lead BA - Logistics, Operations, Data & Testing	Logistics analysis, integration, end-to-end testing, process design

External Stakeholders

- SAGE Implementation Partner/Consultant
- Branch Managers (Uyo)
- Department Heads (Finance, Procurement, Sales, Inventory)
- End Users (Key Users and Super Users)
- IT Infrastructure Team
- Legal and Compliance Team

Communication Plan

- **Steering Committee:** Monthly (or as needed for critical decisions)
- **Project Board:** Bi-weekly status updates
- **Project Team:** Weekly team meetings, daily standups
- **Stakeholders:** Bi-weekly newsletters, shared project dashboard
- **End Users:** Training sessions, town halls, feedback channels

7. ASSUMPTIONS

1. Necessary infrastructure (network, hardware) is available and meets SAGE requirements
2. Key stakeholders will be available for workshops, testing, and signoffs within agreed timelines
3. Legacy system data is accessible and can be extracted for migration
4. SAGE implementation partner/consultant is experienced and available as per contract
5. Business process changes will be supported by senior management
6. Budget and resources are secured and approved
7. No major organizational restructuring during implementation period
8. Regulatory requirements for Nigeria operations are stable
9. Internet connectivity at Uyo branch is reliable for cloud-based ERP
10. Users have basic computer literacy for system training

8. CONSTRAINTS

1. **Timeline:** Fixed wave schedule; Uyo implementation must complete before next wave begins
2. **Budget:** [Insert Budget Amount] - fixed allocation, no additional funding approved
3. **Resources:** Limited availability of key business users due to ongoing operations
4. **Technology:** Must work within SAGE Business Cloud standard functionality; customization limited
5. **Data:** Only approved data objects from legacy system will be migrated
6. **Regulatory:** Must comply with Nigerian accounting and tax regulations
7. **Geographic:** Physical distance may impact face-to-face training and support
8. **Change Management:** User change fatigue from previous system implementations
9. **Dependencies:** Dependent on SAGE partner's resource availability and delivery schedule
10. **Infrastructure:** Existing network and hardware capabilities may limit performance

9. RISKS & MITIGATION STRATEGIES

High Priority Risks

Risk	Impact	Probability	Mitigation Strategy
Data Migration Issues: Incomplete/inaccurate legacy data	High	Medium	Early data assessment, data cleansing workshops, multiple migration dry-runs, validation checkpoints
User Resistance: Low adoption due to change fatigue	High	High	Strong change management program, early user involvement, Train-the-Trainer model, executive sponsorship visibility
Infrastructure Constraints: Network reliability issues	High	Medium	Pre-implementation infrastructure assessment, backup connectivity plans, offline contingency procedures
Resource Availability: Key stakeholders unavailable	Medium	Medium	Early stakeholder commitment, backup resource identification, formal time allocation agreements
Timeline Slippage: Dependencies cause delays	High	Medium	Buffer time in critical path, early identification of dependencies, proactive issue escalation

Medium Priority Risks

Risk	Impact	Probability	Mitigation Strategy
Scope Creep: Uncontrolled requirement additions	Medium	High	Formal change control process, clear scope baseline, regular scope reviews
Integration Challenges: Systems don't integrate smoothly	Medium	Low	Thorough testing cycles, SAGE partner expertise, early integration testing
Knowledge Gap: Insufficient technical skills	Medium	Medium	Comprehensive training program, documentation, post-Go-Live support
Regulatory Changes: New compliance requirements	Medium	Low	Regular regulatory monitoring, legal team consultation, flexible configuration

Risk Management Approach

- Weekly risk review in project team meetings
- RAID (Risks, Assumptions, Issues, Dependencies) log maintained and shared
- Escalation protocol: Team → PM → Project Board → Sponsor
- Contingency reserve maintained for risk response and unforeseen project activities.

10. PROJECT DELIVERABLES

Phase 1: Discovery

- Current state process documentation
- Gap analysis report
- Requirements specification document
- Stakeholder analysis and engagement plan

Phase 2: Prepare & Explore

- Fit-to-Standard workshop outcomes
- Solution design document
- Data migration strategy and plan
- Training needs analysis and plan
- Test strategy and plan

Phase 3: Realize

- Configured SAGE ERP system (Uyo)
- Test scripts and scenarios
- Data migration scripts
- Training materials and curriculum
- User guides and documentation

Phase 4: Deploy

- Migrated master and transactional data

- Trained key users and super users
- UAT sign-off documentation
- Go-Live readiness assessment report
- Cutover plan and runbook

Phase 5: Launch & Go-Live

- Production environment operational
- Hypercare support logs and resolutions
- Performance monitoring reports
- Lessons learned document
- Project closure report

Phase 6. System Evaluation (Review & Closure)

- System Performance Review Report
- Client Feedback & Enhancement Summary
- Final Documentation & [Knowledge Transfer Package](#)
- Project Closure Report with Final Sign-off

11. BUDGET & RESOURCES

Budget Summary

Category	Estimated Cost
SAGE Licensing	Confidential

Implementation Partner Services	Confidential
Training & Change Management	Confidential
Data Migration	Confidential
Infrastructure (if needed)	Confidential
Contingency Reserve (10%)	Confidential
TOTAL PROJECT BUDGET	Confidential

Resource Requirements

- **Project Team:** As per structure above (dedicated % allocation)
- **Subject Matter Experts:** Finance, Procurement, Sales, Inventory leads (20-30% allocation)
- **SAGE Consultants:** 6 consultants for 9 weeks
- **IT Support:** Infrastructure and system administration support
- **Training Resources:** Training room, equipment, materials

12. PROJECT TIMELINE & MILESTONES

Key Milestones

Milestone	Target Date	Success Criteria
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Project Kickoff	01 November 2025	Charter approved, team mobilized
Discovery Phase Complete	10 Nov 2025	Requirements documented and approved
Fit-to-Standard Workshops Complete	16 Nov 2025	Solution design signed off
System Configuration Complete	24 Nov 2025	Configuration validated in test environment
Data Migration Dry-Run 1	06 Dec 2025	Data quality meets 90% accuracy threshold
Training Completion	16 Dec 2025	100% key users certified
UAT Sign-off	19. Dec 2025	>95% test cases passed
Go-Live Readiness Review	21 Dec 2025	All readiness criteria met
GO-LIVE	21 Dec 2025	System operational, no critical issues
Hypercare Period Complete	24 –29 Dec 2025	System stabilized, <5 open issues
Project Closure	29 Dec 2025	All deliverables complete, lessons learned documented

Phase Duration Estimates

- Discovery: 1 Week
- Prepare & Explore: 2 Weeks
- Realize: 2 Weeks

- Deploy: 1 Week
- Go-Live & Stabilize: 2 Weeks
- Total Project Duration: 8 Weeks

13. APPROVAL & AUTHORIZATION

This Project Charter formally authorizes the SAGE Business Cloud ERP Implementation project for MDY Mart Ventures Ltd (Wave 2 – Uyo Branch) and empowers the Project Manager to utilize approved organizational resources in support of project delivery.

Project Authorization

The project was formally approved and authorized by the Project Sponsor, Project Board, Finance Leadership, and Implementation Team.

Authorization Status: Approved

Authorization Date: 01 November 2025

Authorized By:

- Project Sponsor (CEO)
- Project Board
- Finance Director (CFO)
- Project Manager

This charter serves as the official authorization to initiate project activities and proceed with the approved implementation plan.

14. APPENDICES

Appendix A: Acronyms and Definitions

- ERP – Enterprise Resource Planning
- FMCG – Fast-Moving Consumer Goods
- UAT – User Acceptance Testing
- RAID – Risks, Assumptions, Issues, and Dependencies
- SME – Subject Matter Expert
- BA – Business Analyst
- PO – Product Owner

Appendix B: Related Documents

- Project Charter
- Business Requirements Document (BRD)
- Functional Requirements Document (FRD)
- High-Level Project Plan
- RAID Log
- Lessons Learned Report
- Project Closure Report

Appendix C: Stakeholder Groups

- Project Sponsor
- Project Board
- Project Manager
- Business Process Owners
- Key Users and Super Users
- Implementation Partner
- IT Infrastructure Team
- Finance Leadership

Appendix D: Communication Framework

- Steering Committee Meetings
- Project Status Reports
- Project Team Meetings
- Training Sessions
- Go-Live Communications
- Hypercare Support Communications
- Document Control

Version: 1.0

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Author: Evidence Omobude

Change Description: Initial Charter Creation

This Project Charter is a living document and may be updated through the formal change control process with approval from the Project Sponsor and Project Board.

