

Scope Definition

Project Scope Planning and Scope Definition

Defining the Project Outcome and How to Get There

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Scope Definition

Lesson Summary

- In this presentation, we will:
 - Discuss the process of planning how scope will be managed
 - Discuss the steps in defining the project's scope
 - Identify some of the tools and techniques used to analyze project scope, identify project priorities and manage trade-offs.
 - Discuss the content of the Project Scope Statement

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“Our problem, in essence, is a simple one. We never have enough time to do anything, but we always find time to do it twice.”

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The Scope Management Process

- Step 1: Planning how project scope will be defined, managed and controlled
- Step 2: Collecting Requirements
- Step 3: **Defining the scope; establishing project priorities**
- Step 4: Creating the Work Breakdown Structure
- Step 5: Integrating the WBS with the Organization
- Step 6: Coding the WBS for the Information System

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Why Don't We Plan?

- Plans are only good intentions unless they immediately degenerate into hard work
- Lamé excuses for not planning:
 - Takes too much time
 - Customers don't know what they want
 - If we commit, we will be held accountable

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Why do plans fail?

- Organizational objectives are not understood
- Too much scope/too little time
- Inaccurate cost plan
- Viability not accessed
- No integrated planning
 - No monitoring and control systems in place
 - No desire to do so ("just unnecessary management overhead!")
- No history on which to base resource, time and cost estimates
- Plans not reviewed by stakeholders, functional units doing the work
- Limited buy-in

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Why do plans fail? (cont.)

- Project objectives are hazy/unknown/conflicted
- Project resources unknown
- Milestones and approval stages unknown
- Appropriate personnel not available or overloaded
- Multiple, inconsistent sets of objective/specifications
- Human resources reassigned with little regard for schedule or client expectations of quality
- Groups, rather than teams, attempting to achieve objectives
 - Groups work on a project without sharing a common objective
 - Teams share a common objective and commit to it
- Insufficient time to estimate cost, resources

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Why Plan?

- Understand all of the work that needs to be done and when
- Understand the relationships between work activities
- Determine responsibilities
- Estimate resources
- Reduce uncertainty/reduce risk

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“The alternative to systematic planning is decision making based on history. This generally results in reactive management leading to crisis management, conflict management, and fire fighting.”

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What questions should the Scope Management Plan answer?

- What documents do we have that support our scope decisions?
- How do we decide what is and is not within scope?
- What services does the client expect us to provide and is not included?
- Who gets to authorize scope changes within the firm?
- What are the steps in the process of making scope changes?

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Defining the Project Scope

- Project Scope
 - A definition of the work included to create the deliverables that will become end result or mission of the project
 - What is included and not included within the scope of the project
 - How is the project framed? What are the boundaries?

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Defining the Product Scope


- Product Scope
 - The identified and defined features of the outcome or deliverables of the project's work.
 - The function and features of the deliverables that are to be included or not included.

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When Push Comes to Shove ...



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Establishing Project Priorities

- Causes of Project Trade-offs
 - Shifts in the relative importance of criterions related to cost, time, and performance parameters
 - Budget–Cost
 - Schedule–Time
 - Performance–Quality

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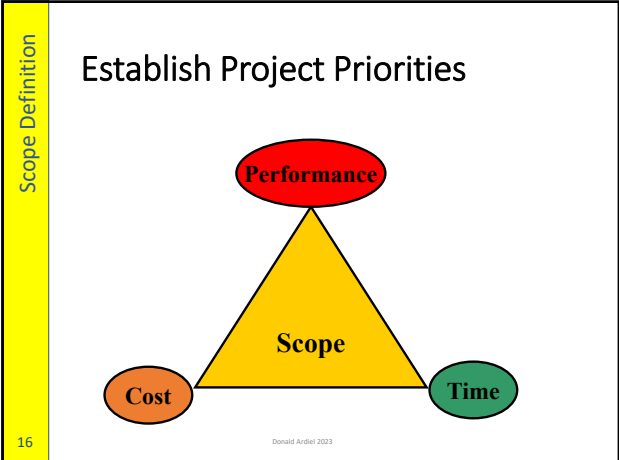
Establishing Project Priorities (cont'd.)

- Managing the Priorities of Project Trade-offs
 - Constrain: a parameter is a fixed requirement.
 - Enhance: optimizing a parameter over others.
 - Accept: reducing (or not meeting) a parameter requirement.

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Trade-off Alternatives

	Time	Cost	Quality
Constrain	●		
Enhance			●
Accept		●	

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Trade-off Alternatives

	Time	Cost	Quality
Constrain	●		
Enhance			●
Accept		●	

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Managing Priorities and Trade-offs

- Six Steps of Trade-off Analysis
 - Understanding Conflict
 - Project Objectives review
 - Project/Problem Context Analysis
 - Alternative Identification
 - Alternative Analysis
 - Plan Revision and Approval

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Project Scope Statement

- Scope Statement
 - Project justification
 - Connection to strategic plan
 - Project outcome
 - What does the outcome look like
 - Project deliverables
 - What tangible outcomes are produced along the way
 - Project objectives
 - SMART(IES)
 - How will we measure our progress and success
 - Product acceptance criteria

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Defining the Project Scope (cont'd.)

- Purpose of the Scope Statement
 - To clearly define the deliverable(s) for the end user.
 - To focus the project on successful completion of its goals.
 - To be used by the project owner and participants as a planning tool and for measuring project success.

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Defining the Project Scope (cont'd.)

- What is the end result, product or service of the project?
- In clear and concise terms, what are the deliverables for each life cycle phase?
- What is the quality that is expected by the customer?

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Project Scope Statement



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What is a Scope Statement

- Primary tool for communicating requirements
- Defines the scope and purpose
- Bridges the deliverable and the business case
- Establishes boundaries of the project's scope

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Basic Content of the Scope Statement

- Project Overview
- Purpose Scope and Objectives
- Assumptions, Constraints and Risks
- Deliverables expectations
- Schedule expectations
- Budget expectations

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Project Overview

- A brief narrative outlining the relation of the project to the strategies and objectives of the organization
- Assists in building commitment through answering three questions:
 - How the project outcomes will achieve organizational objectives
 - How the project plan has been developed
 - What role the reader has in committing to the plan.

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Purpose, Scope and Objectives

- What is the connection of the scope to the business case
- What are the SMART objectives of the project
 - Specific
 - Measurable
 - Assignable
 - Realistic
 - Time related

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Assumptions

- In developing the project’s scope, assumptions have been made such as:
 - Market acceptance
 - Reasonable resource availability
 - Available documentation accurately reflects the project’s context

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Constraints

- Are there organizational constraints related to
 - Budget
 - Schedule
 - Resources
 - Quality
 - Use of existing systems
 - Available technology

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Risks

- What are the uncertainties at the beginning of the project?
- What could happen to prevent the objectives from being achieved?
- What is the measure of our certainty?
- Are we risk seeking, risk neutral or risk adverse?

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Deliverables

- What are the tangible results of our efforts at a system level?
- Describe the deliverable:
 - Characteristics
 - Format
 - Date of delivery
 - Quantity

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Schedule

- Milestones:
 - When does the client/project sponsor expect each deliverable to be completed?
- Expected completion of the project consistent with the business case/purpose

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Budget

- What is the estimated cost of the project?
- Over what time span will the cash flow?
- Whose resources will be used for the work?

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