Successfully Managing Project Scope

Cindy Etoh, PhD, PMP

Scott David, PMP

Mark Holdread, PMP
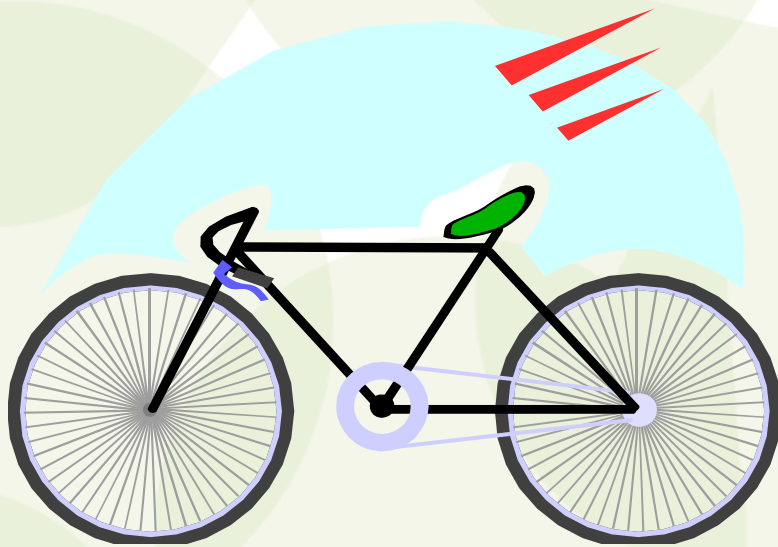
Alissa Soria

Dora Martinez

Kathrine Cain

Table of Content

- Define Scope
- Create a Scope Statement
- Hand-on Project Case Study
- Discuss Scope Best Practices

Why is Scope Management Important?

- Scope Overload/Creep is the leading reason for the high failure rates of projects

Dissatisfied Customers!

Defining Project Scope

In Scope

Out of Scope

Out of Scope

Product + Project Scope = Scope Definition

Purpose of Scope Statement

- Clearly communicates deliverables to your customers

- Laser focus on successful completion of project goals

- Ideal planning tool and great for measuring project success
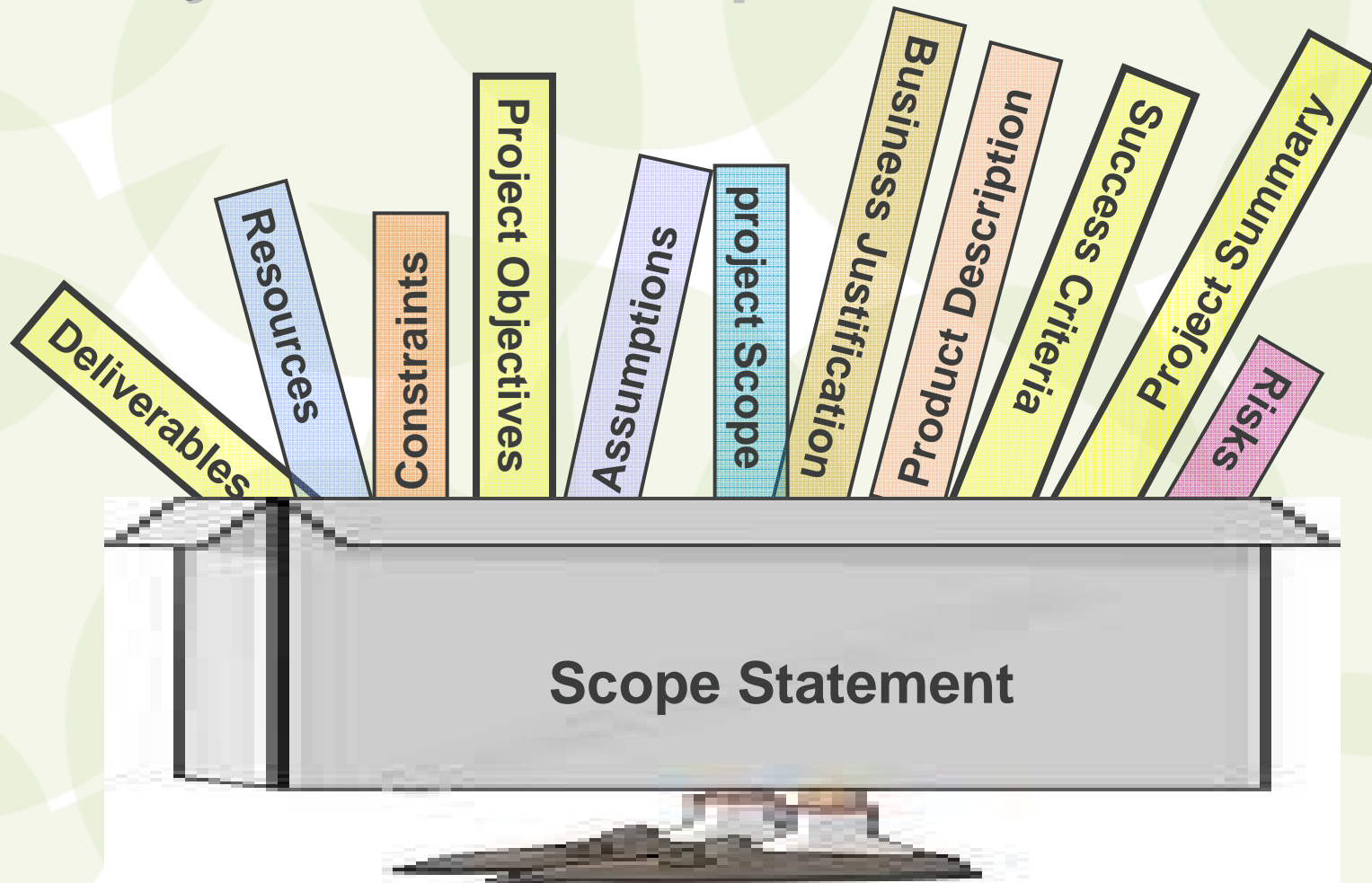
What is in the Charter?

- Business Case – why are we doing this project?
- Project purpose and high level deliverables
- Identifies Project Manager and Sponsor
- Resources – budget, staff, and vendor

Project Description:

What? + When? + How Much? + Why? = Project Elevator Pitch

This project will deploy_____ by date/between _____ at a cost of _____ because of _____

Project Objectives:

- **Describes what the project will accomplish and the business value**
- **Quantifies with time, cost, and quality considerations**

Upgrade the financial system by X date to achieve average invoicing times of no more than X day(s)

Deliverables:

- **Are verifiable items being produced to complete an aspect of the project**

  Examples: upgraded system/process, project plan, rented venue, training literature, closure report

Success Criteria:

- **Describes performance standards that will be used to determine project success**

  Project is completed within X% of committed schedule

  Customer satisfaction rating of new system increases to X% within X months of implementation

Let's Try: Scope Statement

- Your team will organize a food and wine festival for the Food Channel.
  - Develop a Scope Statement focusing on Project Summary, Objectives, Deliverables (in & out of scope) and Success Criteria
  - Business Problem: 20% more TV viewers and make 30% profit
  - Discuss Project Charter and Requirements
  - Ask additional questions to obtain the necessary information
  - Central Park in NY is the confirmed venue and

    a $500k budget has been approved.

    Modify Scope Statement to reflect this
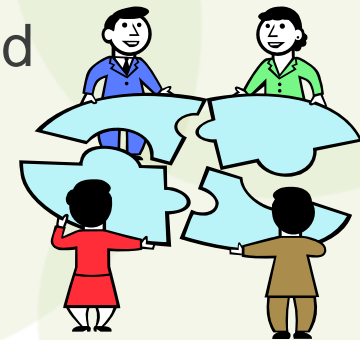
Scope Best Practices

- Our findings and best practices
  - Questions?

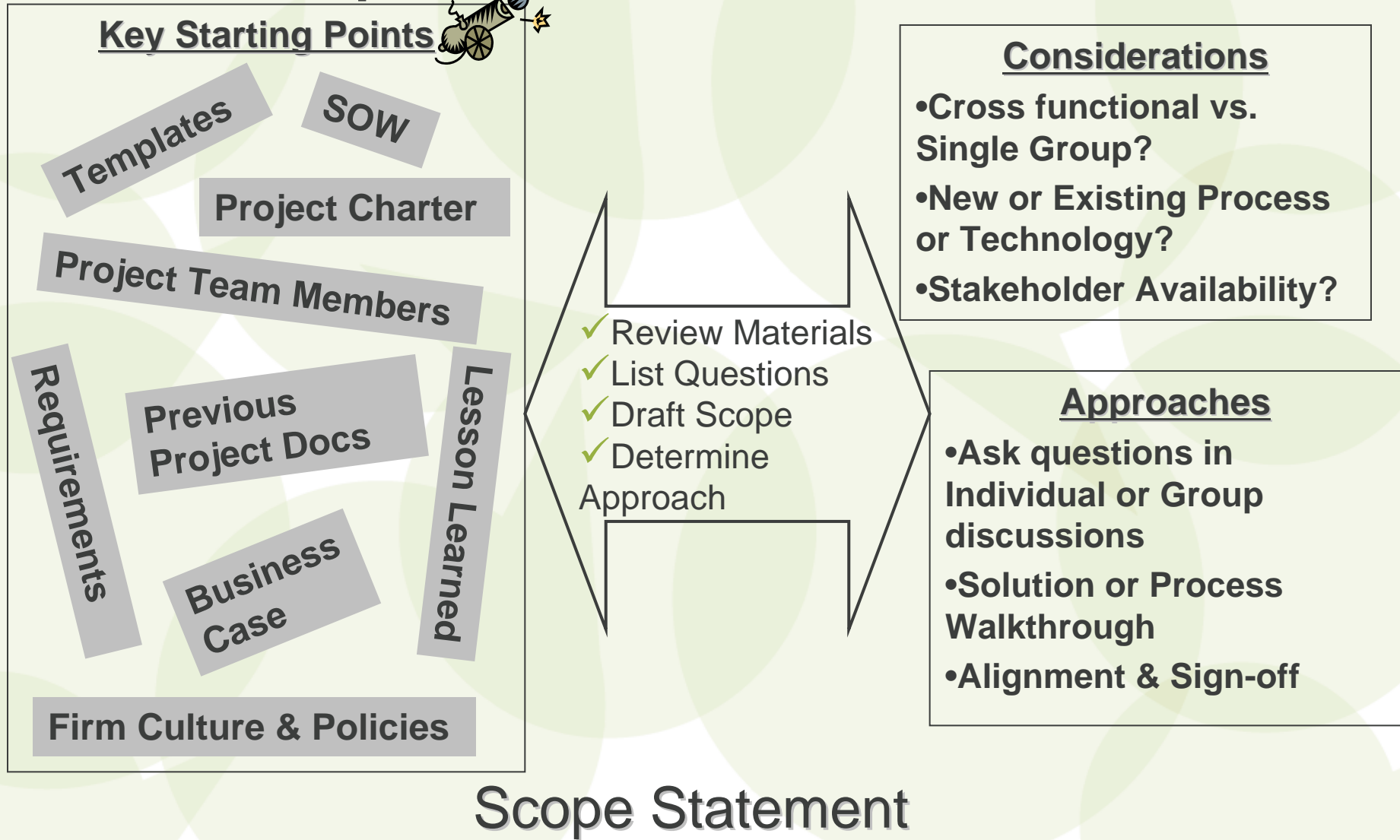**Contact Email: cetoh@shearman.com**

Supporting Material Section

Common Scope Mistakes

- Defining scope too early with no further elaboration
- Customers coming up with key requirements late
- Define scope in general terms

Scope Definition Process

i/+^ 2010 strategic unity

Key Starting Points

- Templates
- SOW
- Project Charter
- Project Team Members
- Requirements
- Previous Project Docs
- Lesson Learned
- Business Case
- Firm Culture & Policies

- ✓ Review Materials
- ✓ List Questions
- ✓ Draft Scope
- ✓ Determine Approach

Considerations

- •Cross functional vs. Single Group?
- •New or Existing Process or Technology?
- •Stakeholder Availability?

Approaches

- •Ask questions in Individual or Group discussions
- •Solution or Process Walkthrough
- •Alignment & Sign-off

Scope Statement

Scope Definition Dos & Don'ts

i/+∧ 2010 strategic unity

❌ General & qualitative descriptions

❌ Omitting a deliverable means it is out of scope

❌ Create scope statement in Initiation

❌ Focus on the end product or solution

❌ Only asking a series of clarifying questions

❌ Accepting and not revisiting predetermined constraints

❌ Only seek stakeholder input

✅ Precise & measurable descriptions

✅ Explicitly state out of scope items

✅ Devise scope statement after requirements gathering

✅ Focus on the business problem

✅ Help customer visualize the technology/process

✅ Negotiate and renegotiate success criteria

✅ Obtain stakeholder feedback and sign-off