# Successfully Managing Project Scope

Cindy Etoh, PhD, PMP

Scott David, PMP

Mark Holdread, PMP
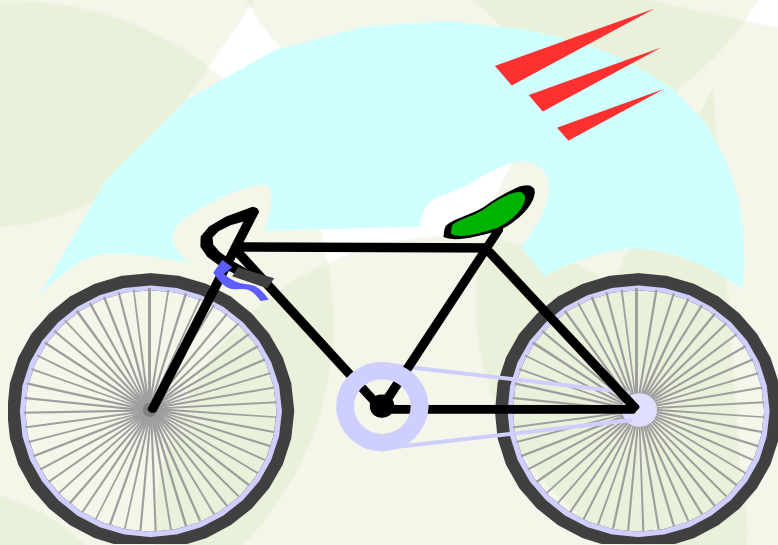
Alissa Soria

Dora Martinez

Kathrine Cain

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- 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
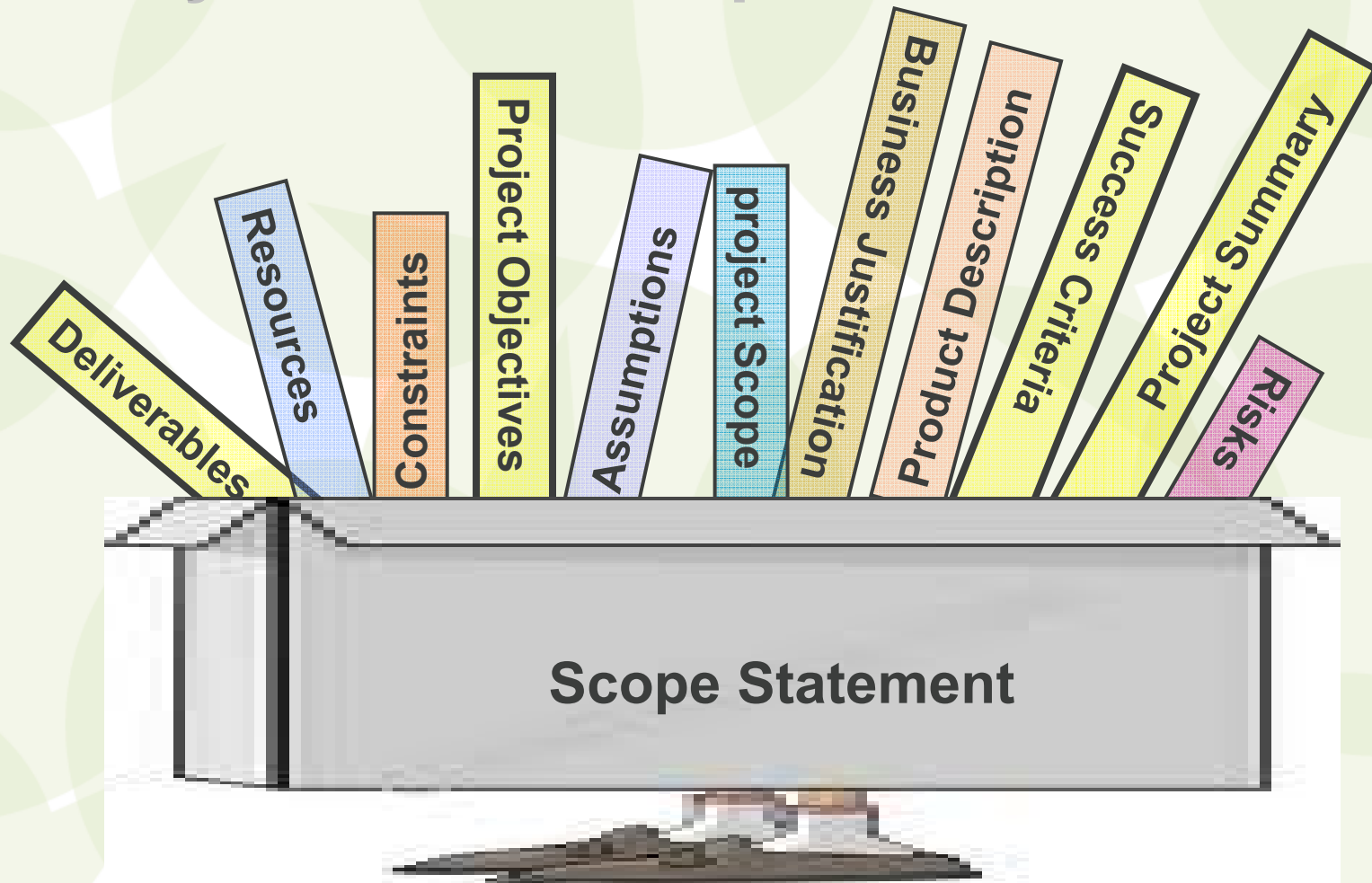
# What is in the Charter?

- Business Case – why are we doing this project?

- Project purpose and high level deliverables

- Identifies Project Manager and Sponsor

- Resources – budget, staff, and vendor

# What is in a Scope Statement?

**Why + What** = **Scope Statement**

Deliverables

Resources

Constraints

Project Objectives

Assumptions

project Scope

Business Justification

Product Description

Success Criteria

Project Summary

Risks

**Scope Statement**

# 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
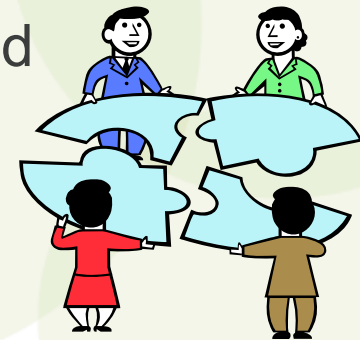
# Scope Best Practices

- Our findings and best practices
- Questions?

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

# Supporting Material Section

# Scope Questions

- Why are we doing the project?
- What are the main business objectives?
- What is the Project expected to deliver?
- What is the Project not going to deliver?
- What needs to occur to achieve these objectives?
- What constitutes a successfully delivered Project?
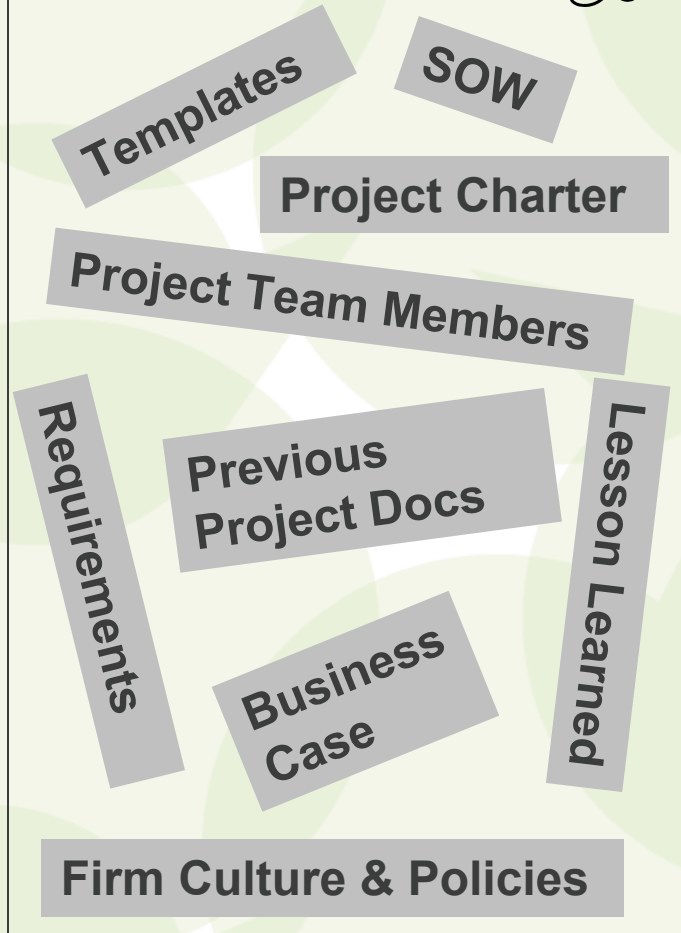
# Common Scope Mistakes

- 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

| | |
|---|---|
| ❌ General & qualitative descriptions | ✅ Precise & measurable descriptions |
| ❌ Omitting a deliverable means it is out of scope | ✅ Explicitly state out of scope items |
| ❌ Create scope statement in Initiation | ✅ Devise scope statement after requirements gathering |
| ❌ Focus on the end product or solution | ✅ Focus on the business problem |
| ❌ Only asking a series of clarifying questions | ✅ Help customer visualize the technology/process |
| ❌ Accepting and not revisiting predetermined constraints | ✅ Negotiate and renegotiate success criteria |
| ❌ Only seek stakeholder input | ✅ Obtain stakeholder feedback and sign-off |