Scope Management

Chapter 5

Project Scope

Project scope is **everything about a project** – work content as well as expected outcomes.

Scope management is the function of **controlling a project** in terms of its goals and objectives and consists of:

1) Conceptual development
2) Scope statement
3) Work authorization

4) Scope reporting
5) Control systems
6) Project closeout

Conceptual Development

*The **process** that addresses **project objectives** by finding the best ways to meet them.*

Key steps in information development:
- Problem/need statement
- Information gathering
- Constraints
- Alternative analysis
- Project objectives

Problem Statements

Successful conceptual development requires:

- **Reduction** of overall project **complexity**

- Goals and objects are **clearly stated**
  - Reference points are provided

- Complete **understanding** of the problem

Statement of Work (SOW)

*A SOW is a **detailed narrative description** of the work required for a project.*

Effective SOWs contain

1. Introduction and background
2. Technical description
3. Timeline and milestones
4. Client expectations

The Scope Statement Process

1. Establish the project **goal criteria**
    a) cost
    b) schedule
    c) performance
    d) deliverables
    e) review gates
2. Develop the **management plan** for the project
3. Establish a **work breakdown structure**
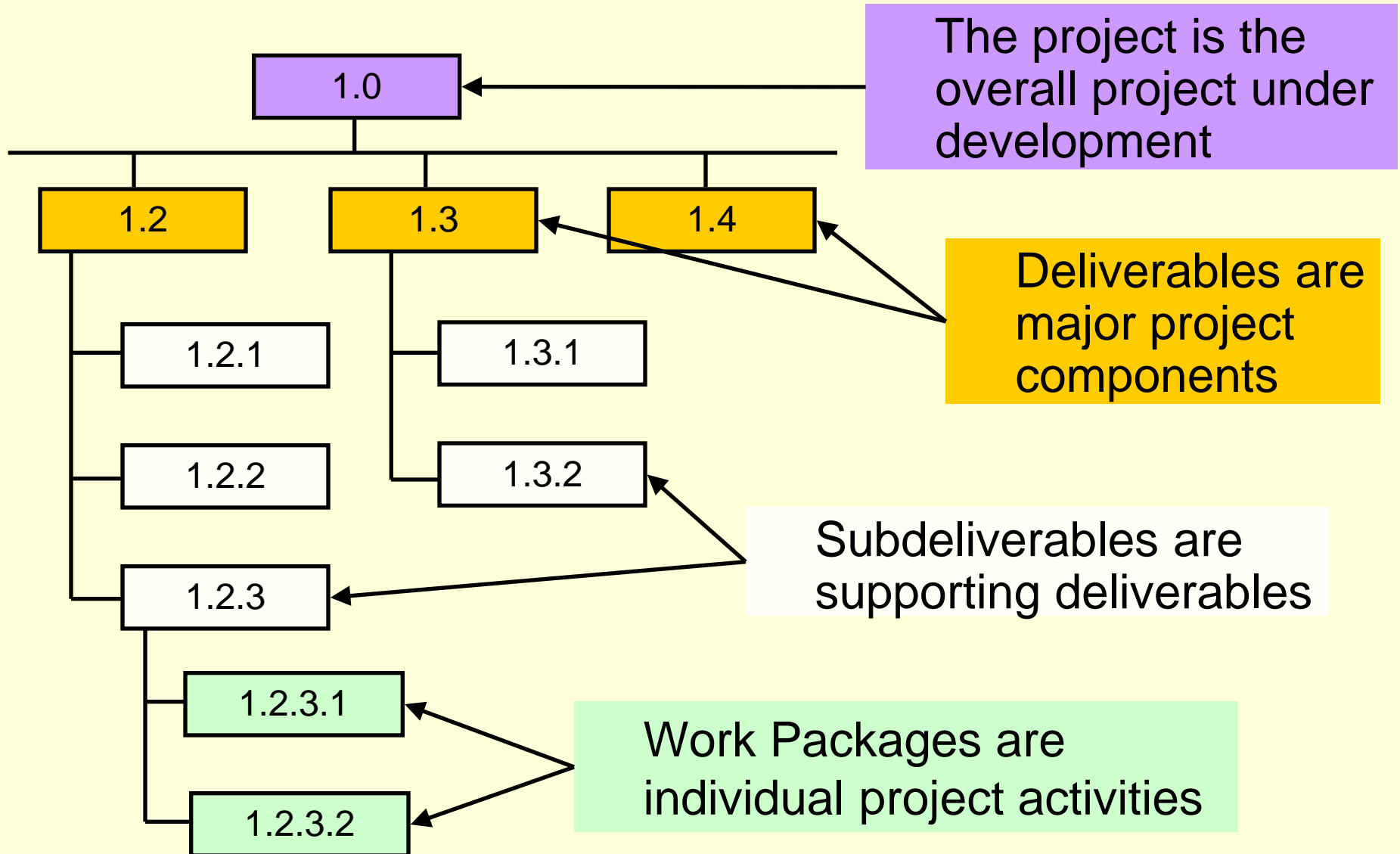4. Create a **scope baseline**

Work Breakdown Structure

a process that sets a project's scope by **breaking down** its overall **mission** into a cohesive set of synchronous, increasingly **specific tasks**.

What does WBS accomplish?
- ❖ Echoes project objectives
- ❖ Offers a logical structure
- ❖ Establishes a method of control
- ❖ Communicates project status
- ❖ Improved communication
- ❖ Demonstrates control structure

Work Breakdown Structure and Codes

1.0	The project is the overall project under development

1.2	1.3	1.4	Deliverables are major project components

1.2.1	1.3.1	
1.2.2	1.3.2	Subdeliverables are supporting deliverables
1.2.3		

1.2.3.1	Work Packages are individual project activities
1.2.3.2	

Sample WBS in MS Project

Work Packages

Lowest level in WBS

Deliverable result

One owner

Miniature projects

Milestones

Fits organization

Trackable

Organizational Breakdown Structure

Organizational Breakdown Structure (OBS) allows

- Work definition

- Owner assignment of work packages

- Budget assignment to departments

OBS links cost, activity & responsibility

Responsibility Assignment Matrix

LEAD PROJECT PERSONNEL

Deliverable	Task & Code		Dave IS	Sue HR	Ann R&D	Jim R&D	Bob IS
Match IT to Org. Tasks 1.1	Problem Analysis	1.1.1	■			☆	○
	Develop info	1.1.2	○	■			☆
Identify IS user needs 1.2	Interview users	1.2.1	○	○	☆		□
	Develop show	1.2.2	☆			■	○
	Gain user "buy in"	1.2.3		☆	■	○	
Prepare proposal 1.3	Find cost/ benefit info	1.3.1			○		□

■ Notification   ○ Responsible   □ Approval   ☆ Support

Work Authorization

The formal **"go ahead"** to begin work

Follows the scope management steps of:
1. scope definition
2. planning documents
3. management plans
4. contractual documents

Contractual Documentation
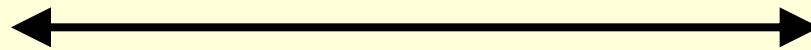
Most contracts contain:

Requirements

Valid consideration

Contracted terms

Contracts range from:

Lump Sum ←————————————→ Cost Plus
also called
"Turnkey"

Scope Reporting

*determines **what** types of information reported, **who** receives copies, **when**, and **how** information is acquired and disseminated.*

Typical project reports contain

1. Cost status
2. Schedule status
3. Technical performance

Types of Control Systems

o Configuration

o Design

o Trend monitoring

o Document

o Acquisition

o Specification

Project Closeout

The job is not over until the paperwork is done…

Closeout documentation is **used to**:
- Resolve disputes
- Train project managers
- Facilitate auditing

Closeout documentation **includes**:
- Historical records
- Post project analysis
- Financial closeout