**Scope Management Plan**

The scope management plan is part of the project management plan. It specifies how the project scope will be defined, developed, monitored, controlled, and validated.

Planning how to manage scope should include at least processes for:

* Developing a detailed scope statement
* Decomposing the project into discrete deliverables using a WBS
* Determining what constitutes a scope change versus a revision and how scope changes will be managed through the formal change control process
* Maintaining the WBS and the scope baseline
* How deliverables will be accepted

In addition, the scope management plan may provide directions on the elements that should be contained in a WBS Dictionary and how the scope and requirements management plans interact.

The scope management plan can receive information from:

* Project charter
* Project management plan

It provides information to:

* Requirements documentation
* Scope statement
* WBS
* WBS dictionary

The scope management plan is an output from the process 5.1 Plan Scope Management in the

PMBOK® Guide – Sixth Edition. It was developed once and does not usually change.

**Tailoring Tips**

Consider the following tips to help tailor the scope management plan to meet your needs:

* For smaller projects you can combine the scope management plan with the requirements management plan.
* For larger projects consider a test and evaluation plan that defines how deliverables will be validated and accepted by the customer.
* If your project involves business analysis you may want to incorporate information on how business analysis activities and project management activities will interact.
* If you are using an agile or adaptive development approach you may want to incorporate information on the release and iteration plans.

# **Alignment**

The scope management plan should be aligned and consistent with the following documents:

* Development approach
* Life cycle description
* Change management plan
* Requirements management plan
* Release and iteration plan

**Description**

You can use the descriptions in Table 2.3 to assist you in developing a scope management plan.

**Elements of the Scope Management Plan**

|  |  |
| --- | --- |
| Document element | Description |
| **WBS** | Describe the WBS and whether it will be arranged using phases, geography, major deliverables, or some other way. The guidelines for establishing control accounts and work packages can also be documented in this section. |
| **WBS Dictionary** | Identify the information that will be documented in the WBS Dictionary, and the level of detail required. |
| **Scope baseline maintenance** | Identify the types of scope changes that will need to go through the formal change control process and how the scope baseline will be maintained. |
| **Deliverable acceptance** | For each deliverable, identify how the deliverable will be validated for customer acceptance, including any tests or documentation needed for sign-off. |
| **Scope and requirements integration** | Describe how project and product requirements will be addressed in the scope statement and WBS. Identify the integration points and how requirements and scope validation will occur. |
| **Project management and**  **business analysis integration** | Describe how business analysis and project management will integrate as scope is being defined, developed, tested, validated, and turned over to operations |

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| --- | --- | --- | --- |
| **SCOPE MANAGEMENT PLAN** | | | |
| **Project Title:** |  | **Date Prepared:** |  |
| **Work Breakdown Structure (WBS)** | | | |
|  | | | |
| **WBS Dictionary** | | | |
|  | | | |
| **Scope Baseline Maintenance** | | | |
|  | | | |
| **Deliverable Acceptance** | | | |
|  | | | |
| **Scope And Requirements Integration** | | | |
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