

Scope and objectives

- the basis for all subsequent work



Some definitions on scope and objectives

- **Why** do we do it – **Purpose**
- **How** do we do it – **Goals**
- **What effect** do we achieve – **Success criteria**



A project can have many goals

- by many stakeholders

Project goals

- Comply with milestones
- Content and quality
- Comply with budget
- Optimize resources
- Employee development
- Positive process

Application goals

- Meeting needs
- Relevant user features
- Easy to use
- Flexibility
- Control / overview

Business goals

- Increased market share
- More customers/users
- Additional sales/profit
- Rationalization
- Comply with legislation
- Positive cost/benefit

Operational goals

- Easy to maintain
- High operational stability
- Low operating costs
- Integration options

Why do we carry out the project? (Purpose)
What is the project's product? (Goal)
What are the project's deliverables? (Sub-goal)
How will we measure the effect of the project?
(Success criteria)



Relation between purpose and goals (1:2)

The Purpose should

- reflect the vision of the project
 - in a logical and consistent hierarchy (sub-purposes)
- be sufficiently concrete so that it can be converted to action

Goals should

- be derived from (founded in) a (sub-)purpose
- be part of a logical and consistent hierarchy (sub-goals)
 - the lowest sub-goals in the hierarchy should be directly executable and give a concrete result (product/delivery)
- have clear success criteria for when the (sub-)goal has been achieved

Remember to include all types of goals



Relation between purpose and goals (2:2)

In simple terms:

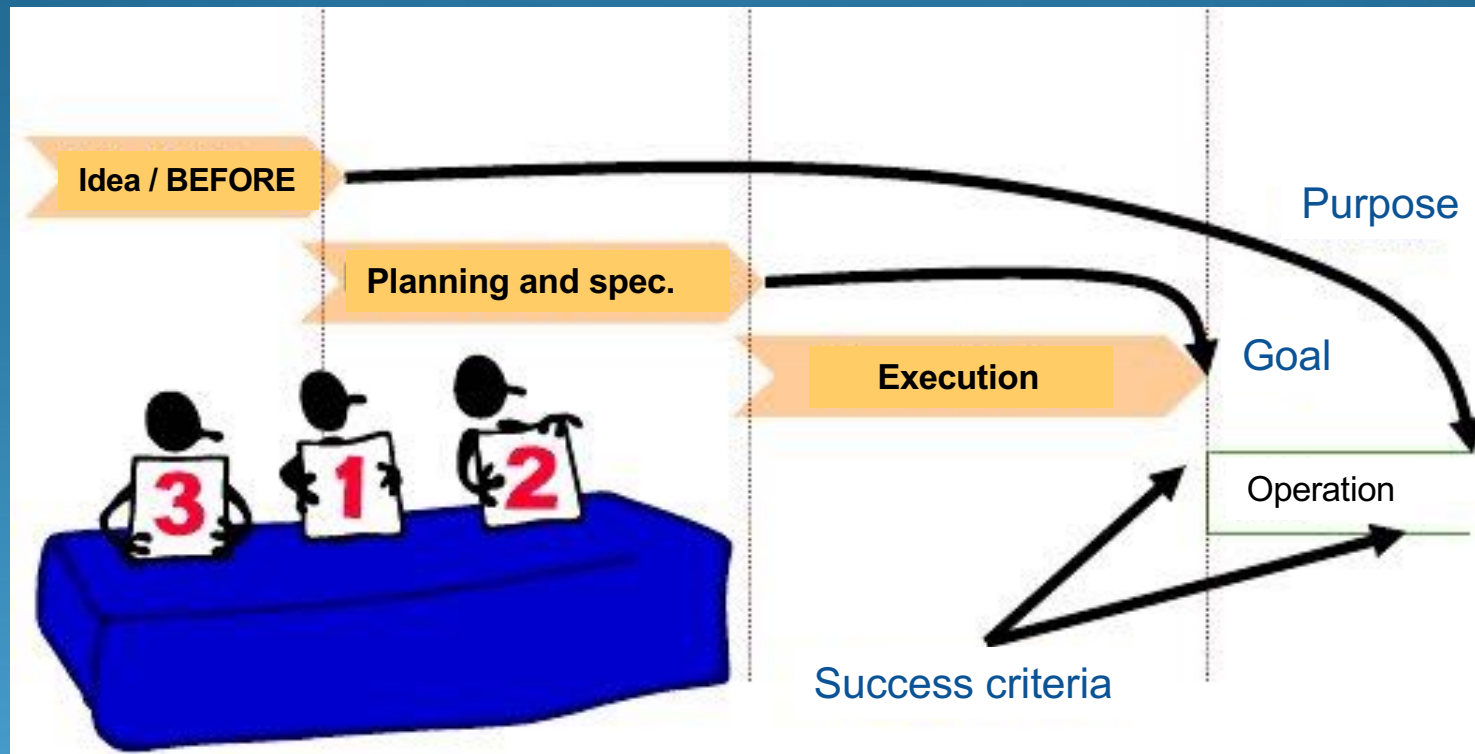
What you have in your hand when the project is finished,
is the deliverable (achieved goal),

and what becomes the effect when the goal has been met,
is the purpose.

All deliverables must be measurable – purpose is usually not.
Success criteria are indicators of fulfilment of the purpose.



Where does purpose, goal and success criteria fit in?



SMART goals

Good project goals are **SMART**

- Specific
- Measurable
- Accepted by the important stakeholders
- Realistic, but possibly ambitious and challenging
- Time-bound, time-boxed

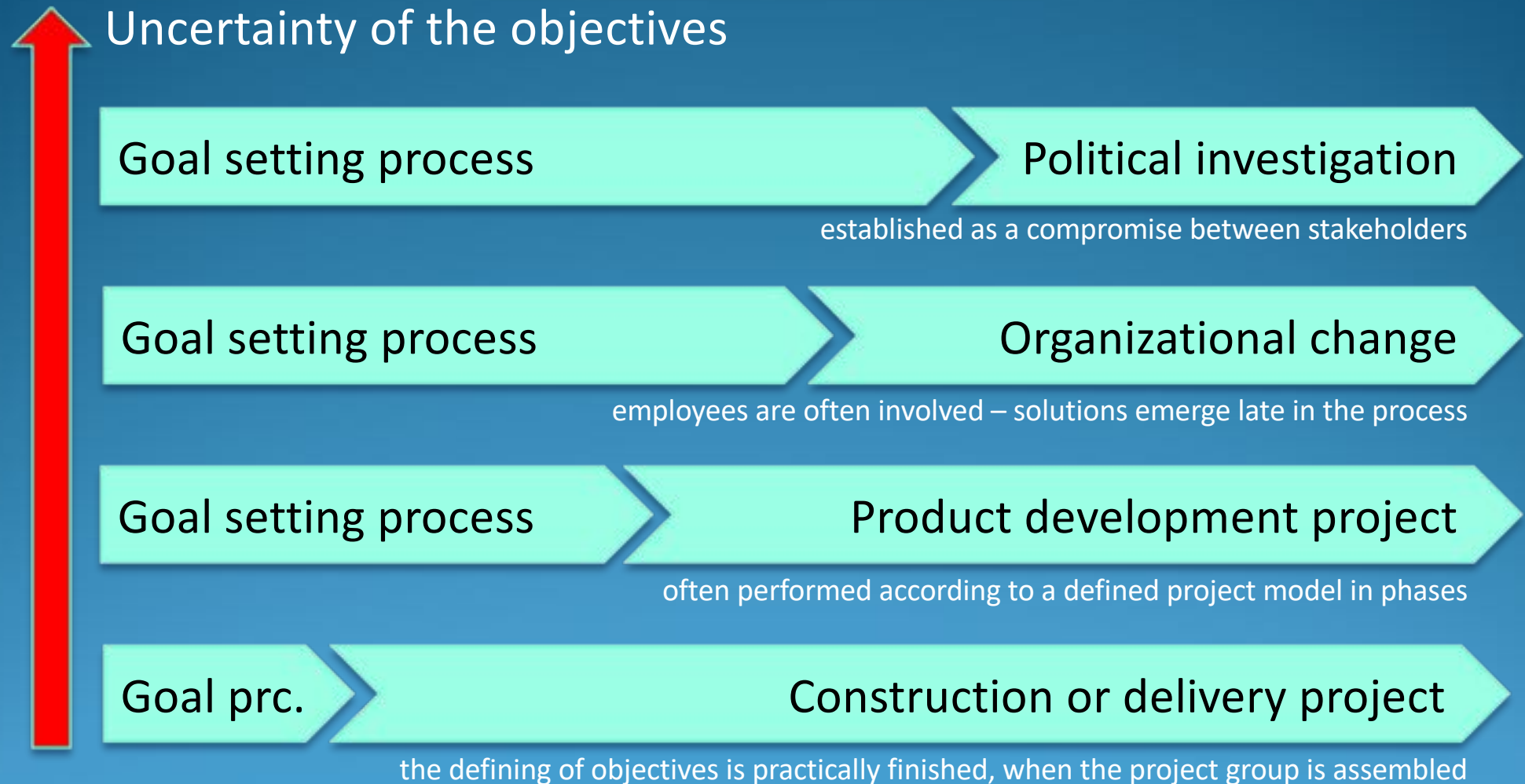


The clearer the goal setting, the more obvious the disagreement

In a changing world the challenge is to
define clear goals among disagreeing
stakeholders



Different goal setting processes



Example of goal setting

Purpose:

- More revenue from our kiosks
- Give customers a better attendance and service
- Create more customer awareness

Products/Deliverables (goals):

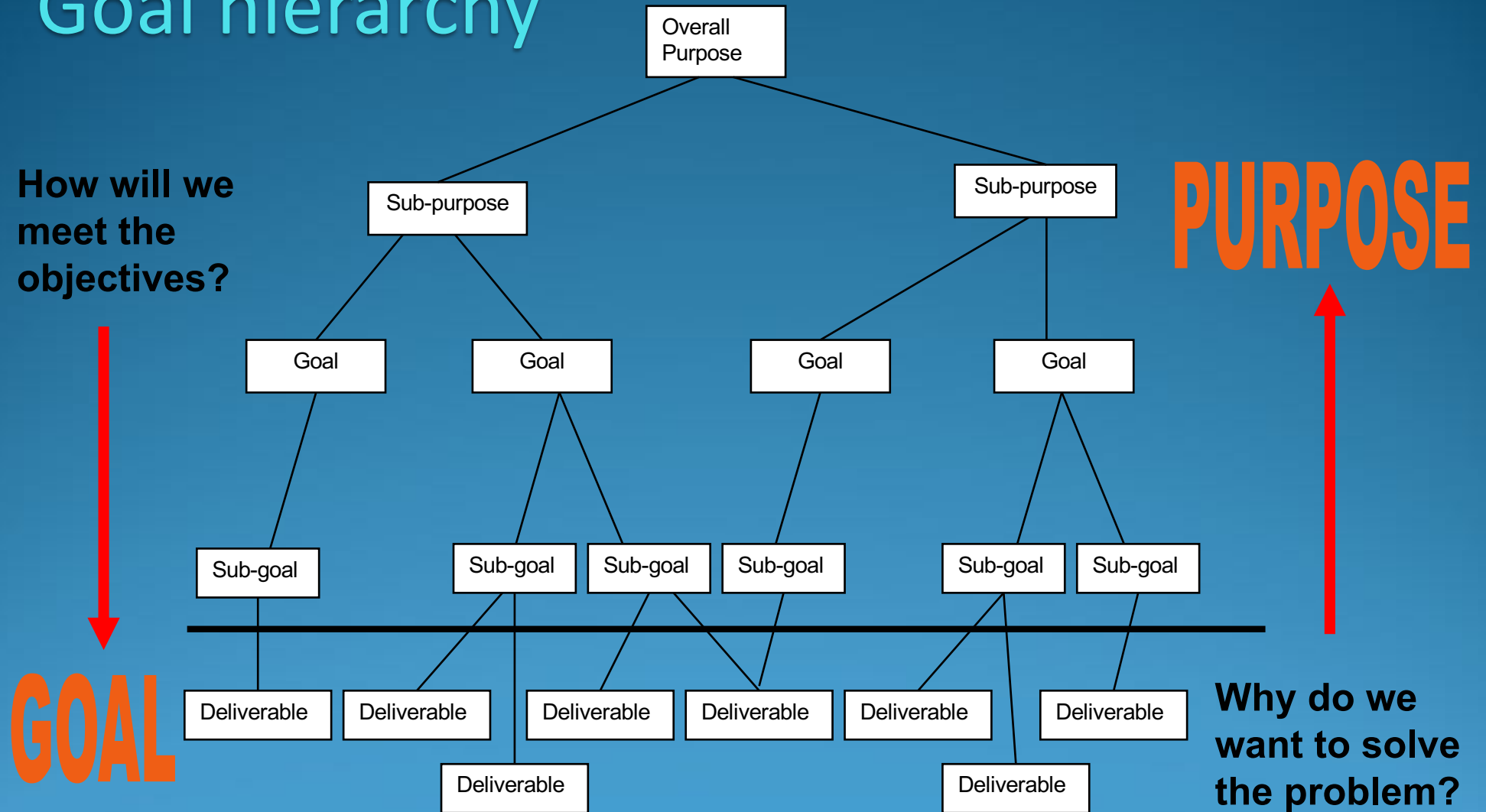
- Dec: Managers trained in the new concept
- Mar: Employee seminars held
- Apr: Advertising campaign rolled out
- May: Analysis of customer satisfaction performed

Success criteria (measurements):

- Revenue increased by 10 % by Dec 31st
- Customer satisfaction scores of 4.2 in the May analysis



Goal hierarchy



Goal analysis process (1:3)

Step 1:

Sketch a goal hierarchy

- by inserting the purposes, goals and deliverables in a logically consistent hierarchy
- The rules for each layer in the hierarchy:
 - Complete – each layer must cover all that is necessary to fulfill the purpose/goals in the layer above
 - No additions – no new purpose/goals not included in the layer above



Goal analysis process (2:3)

Step 2:

Deepen the Goal hierarchy by asking "How"

- Continue asking until the (sub-)goals become sufficiently detailed
- Be creative in this phase – find solutions that are more than just the obvious ones
- Keep asking until the goal hierarchy has a sufficient coverage



Goal analysis process (3:3)

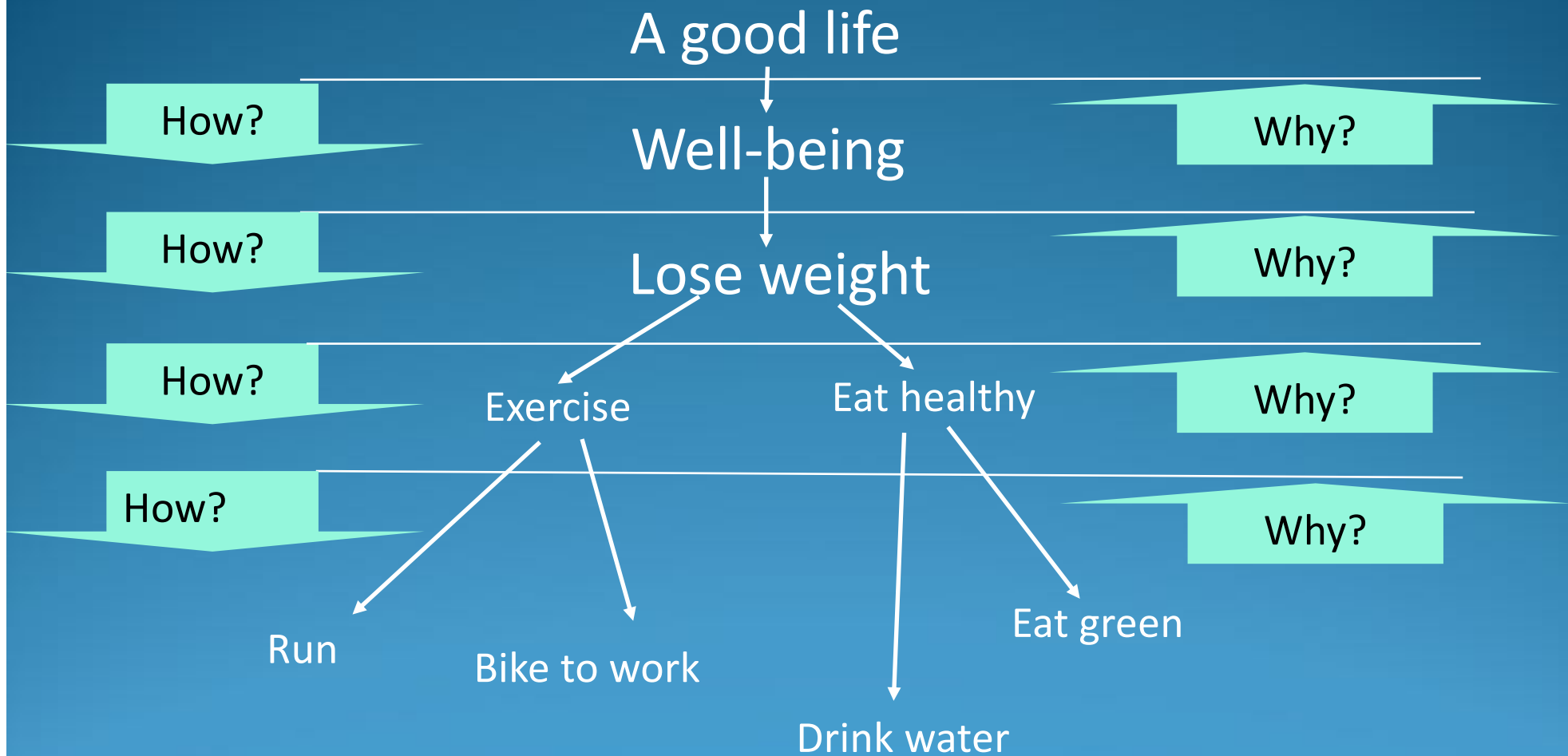
Step 3:

Go up the hierarchy by asking "Why"

- Keep asking until you have found a sufficiently overall purpose which encompasses the whole project
 - i.e. the top rationale for why we want to start the project.
 - must be a purpose (rationale), not just a high-level deliverable
- Sub-goals must be so concrete that they create a "beacon" which all can work towards
 - too general sub-goals are not proper as guiding tools
 - should mark a completion/state of something, not an activity to perform
- Go up (why) and down (how) the hierarchy a couple of times to get the full perspective



Example of a goal hierarchy



The goal hierarchy in schematic form

Purpose: Well-being

Goals (deliverables):

- Eat healthy
 - 6 pieces of green products per day
 - Max xx KJ
 - Drink 3 liters of liquid
 - Drink a large glass of water before every meal
- Exercise
 - Run 3 x 5 km weekly
 - Bike to work every day

Success criteria:

- 31/12-2010 having lost 3 kg.
- 31/06-2010 having lost another 3 kg.



Exercise 1: Goal hierarchy

Join your previous groups
Create a goal hierarchy for :

”A café where you will serve the best coffee in town”

Use step 1-3 of the goal analysis from the previous slides

- sketch it fex. using yellow stickers

Purpose	Why do you want to start the project?
... product	What is the result (outcome/effect) of the project?
... deliverables	Which concrete things will the project deliver?
... measurements	How will you measure the success/effect? (Define SMART goals for every deliverable)

Summary in the plenary



The last goal analysis step: Define scope and sequence

When to deliver what?

- Extract the major deliverables from the goal hierarchy
 - Define the scope of each (and possibly sub-deliverables)
 - Define the sequence (order/when) of the deliveries
- Group the deliverables in meaningful releases (phases)
- **Note:** You are not making a detailed schedule at this time
 - only creating an overview and sequence of concrete (typically physical) deliverables
 - these will later become milestones in your detailed planning
 - detailed activity plans are defined in the Planning & Specification phase in a separate Work Breakdown Structure (WBS)



The essence of the goal setting process

- **WHY** this project
 - Context, Ambition, Reasons
- **HOW** are we going to realize this ambition
 - Objectives, Strategy, Stakeholders
- **WHAT** are the specific objectives and activities
 - Outputs, Benefits, Activities
- **WHAT** does the project NOT cover
 - Out of scope, Undesired outcomes
- **WHEN** do we deliver which deliverables
- **WITHIN** what context will the project be executed
 - Threats, Opportunities, Constraints
- **WHO** is doing what on the project
 - Governance structure



All the time keep an eye on the goals

Beware of:

- Goals that drift/float
 - "We only know the goal, when we reach it"
- Political goals
 - "So ein ding..."
- Relevance
 - "Sow radishes and harvest lettuce"
- Scope creep



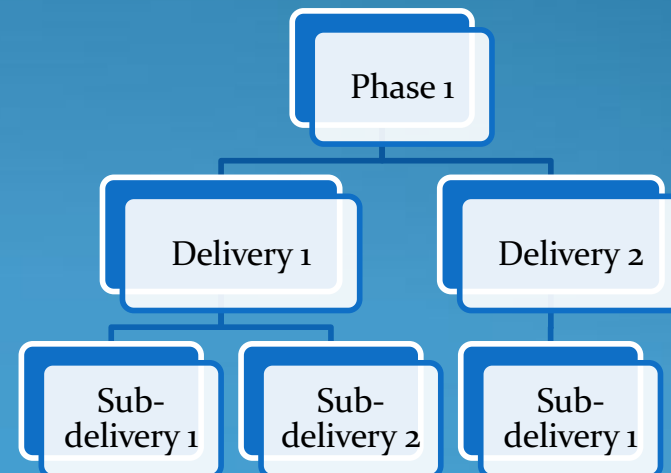
Work Break Down

- defining work packages
- break down into activities



Work Breakdown Structure (WBS)

- **Work packages are the planned work products/activities**
 - not all the activities on the project produce a deliverable
- **Shown in a hierarchical structure**
 - Often a tree diagram with a maximum of three levels
 - The phases/releases in the project *can* be used as level 1



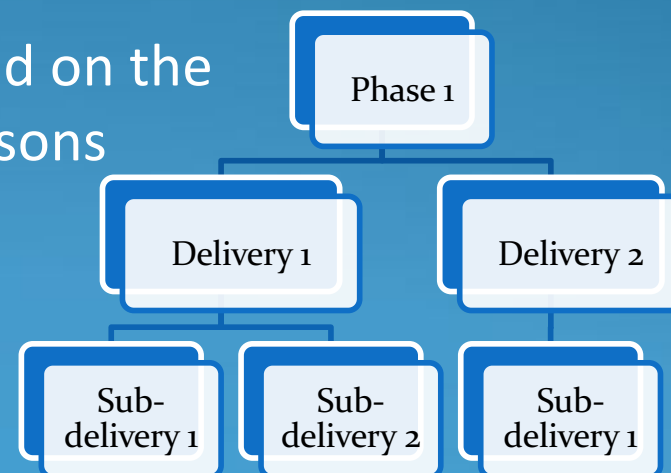
See more details at:

http://en.wikipedia.org/wiki/Work_breakdown_structure



Breakdown of Scope into Work Packages

- **Work packages** are defined and placed in the Work Breakdown Structure (WBS)
- Packages are broken down further into activities
- **Activities** are used as the basis for estimation of the resources required
- **Schedule** for the project is developed on the basis of estimates and allocated persons
- All this is documented in a **Project plan** and approved



Characteristics of good work packages

Work packages result in a:

”product” = a delivery = a document, code/prototype/system ...

Independent of, or have clearly defined links to, other work packages

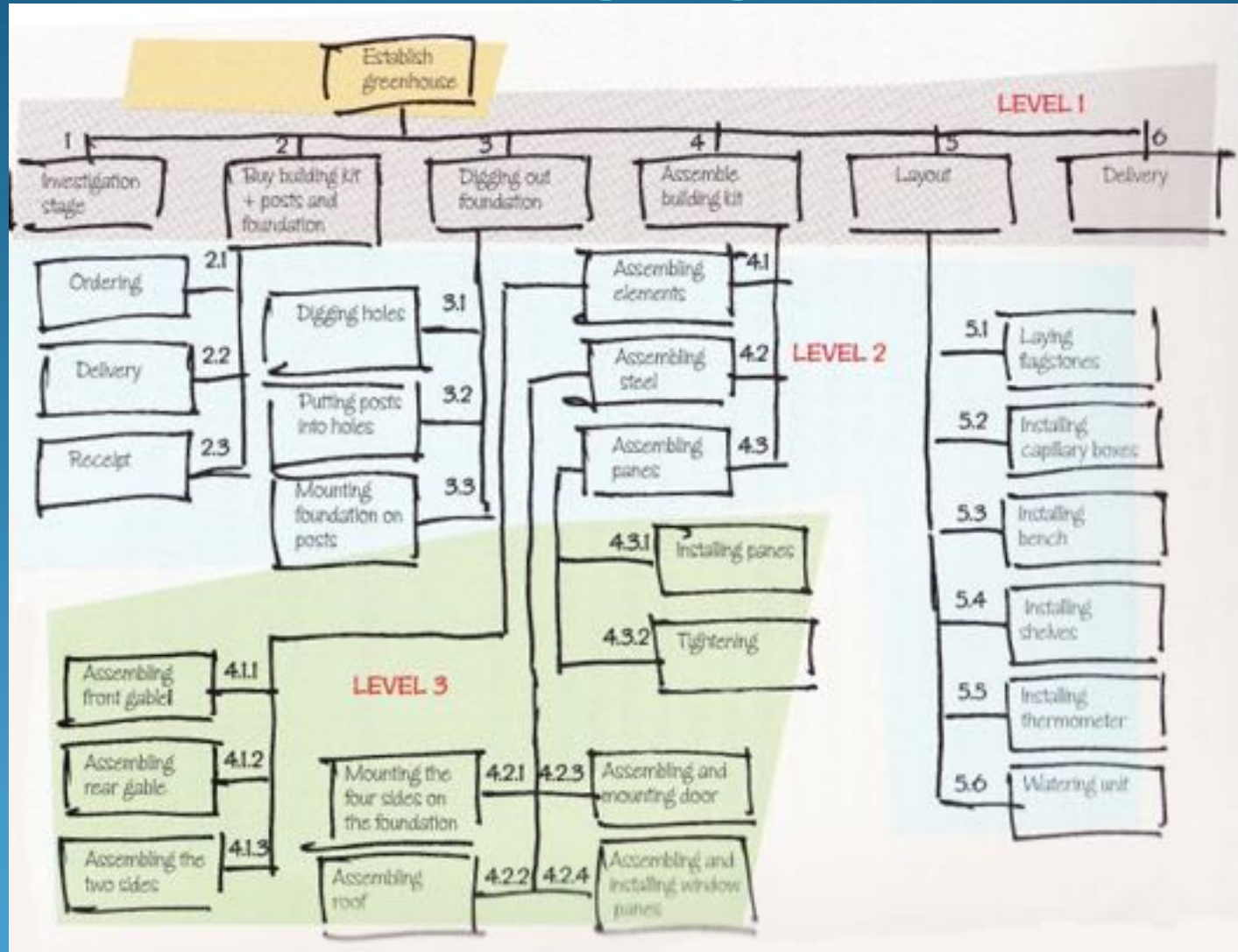
Clearly defined in terms of scope, responsibility and authority

Measurable

Resource requirements, size, duration and cost can be estimated



WBS for constructing a greenhouse

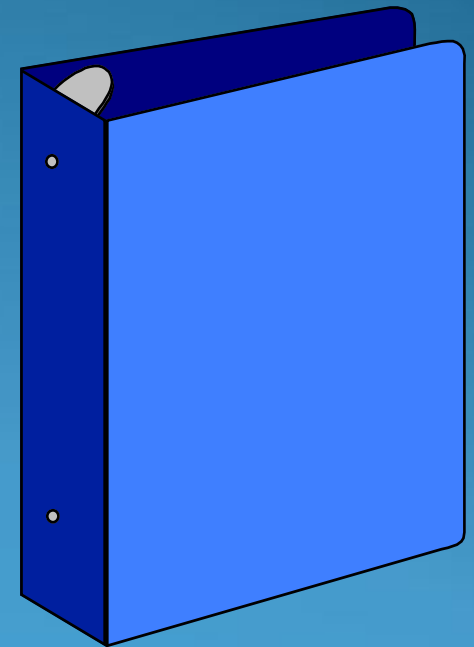


Kousholt (2012e:244)



Project scope documentation

- The **Project description** from the “Opportunity Identification” stage is updated and complemented
 - Goals that must be met are defined precisely – e.g. measurable: “when we have done this, the project is completed”
 - The final deliverables of the project are defined
- An operational **Requirements Specification** is worked out and finalized based on the updated Product description – and approved



Exercise 2: Breakdown into Work Packages

Join the groups from exercise 1

Break down the Café case in work packages and create a tree diagram (WBS)

- Identify relevant products
- Identify and define the phases in the development of the products

Summary in the plenary

