How to Scope Work

December 23, 2017 at 9:31 A M

AFTER FOUR DAYS of working together, she finally admitted, "No one ever taught me how to scope." I was working with one of my clients' senior developers to map out exactly how we were going to get all of the work done that we needed, but a few frustrating hours of going in circles finally revealed the culprit. It's a problem I've seen from very junior to some of the most senior employees I've worked with.

Simply put, I like to define *scope* as:

01   A description of all the work that needs to get done, and

02   The time needed to do said work.

That can be as simple as building a website in 5 days or as complex as organizing

an entire ad campaign. Regardless, the formula remains intact.

Good scoping is often a case of simple arithmetic; by the time you were 8 or 9 years old, you've had the skills to scope well. So why is it so difficult? You're mostly fighting the psychology of it all.

If I asked you if you could build a website (of any given complexity) in 6 months, I'd bet your answer would be, "Probably." That's the valence effect at play: your tendency to think that more good will happen to you than bad. Throw a little Parkinson's law in there (the adage that work expands to fill the time available for its completion) and that explains why you've taken way longer on every project than you should have—and felt good about it to boot. The reality is closer to Hofstadter's law: it always takes longer than you expect (even when you take into account

Hofstadter's law). Rather than relying on gut feelings, we can use math to figure out if you'll meet your deadlines.

Budgeting time

If you're like most people (and like me), it's difficult to save money. Let's say you're trying to save $6,000 for a vacation next year. That's a daunting task at first glance, but it becomes easier when you break it down. Instead of looking at it as $6k, look at it as $500/month ($6,000 ÷ 12 months). Or maybe it's $125/week ($500 ÷ 4 weeks). Or $25/day ($125 ÷ 5 days). When you look at it that way, for every day you go to work, skip your Starbucks coffee, pack a lunch, throw that $25 in a jar, and watch that vacation happen in no time. By breaking it down into

digestible chunks, it's much more manageable!

If it helps, think of scoping like a budget for your time.

Building a website in 5 days

Let's take the simple example from earlier: building a website in 5 days. If it's a 5-page website, our basic math skills (5 pages ÷ 5 days) tell us that we need to average building about 1 page per day. So far, our workload would look like this:

	Wo
Monday	1

	Wo
Tuesday	1
Wednesday	1
Thursday	1
Friday	1

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But we can break that down even further, because building a page has three components to it: ʜᴛᴍʟ, ᴄss, and JavaScript. So, let's divide a typical 9am–5pm workday into four parts (because lunch is incredibly important too, kids):

Monday	Page 1
HTML	9:00
CSS	11:00

| | Lunch | 1:00 |
| | JavaScript | 2:00 |

	HTML	9:00
	CSS	11:00
Tuesday	Lunch	1:00
	JavaScript	2:00

	HTML	9:00
Wednesday	CSS	11:00
	Lunch	1:00
	JavaScript	2:00

Thursday		Page 4
	HTML	9:00
	CSS	11:00

	Lunch	1:00
	JavaScript	2:00

	HTML	9:00
Friday	CSS	11:0(
	Lunch	1:00
	JavaScript	2:00

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This is much better! The specificity here can help to assess if this is a realistic plan. But we can break it down even further.

Let's say the first page has 4 different sections. We can average the time to write the markup for each section, for example:

	Section 1	9:0
	Section 2	9:30
HTML	Section 3	
	Section 4	10:3
CSS		11:0
Lunch		1:00
JavaScript		2:0

You can continue to break down each task further if it's useful to do so, but, even at this level, you can realistically assess the work. Can you write a section of HTML in 30 minutes? If yes, great! You're on schedule

and will make your timeline. If not, what can you adjust or reorder to make it work?

Herein lies the real beauty of this technique: **you'll know when you're in danger of missing a deadline days, weeks, or even months in advance.** For example, if you haven't completed Section 3 of Page 1's HTML by Monday at 10:30am, you're going to miss your deadline. Sure, it's possible that you may make up the time later on, but if you've estimated realistically and remember Hofstadter's law, now—4 days in advance—is a good time to ask your client or manager for an extra day, just in case.

Scoping is about appropriately setting expectations for yourself, your team, and your clients and managers. It's a rare skill that separates the amateurs from the professionals. Which one are you?

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nickeblewis • 2 years ago

Very timely article, as I need to do some scoping today for a potential client of mine. I normally work as a contractor where I don't have to do this so much but now having gone totally freelance.... I am out in the open with this! Thanks for this article!

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Vinish Garg • 2 years ago

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