Scoping Checklist

Context and Needs

- What is the problem/opportunity we are trying to solve?

- Who are we trying to solve the problem/opportunity for?

- How does this problem/opportunity impact the end customer?

- • How confident are we that we understand the root cause?

- What options and alternatives have been discussed?

- Is the project looking to change customer behaviors?

- Is the project looking to change internal user behaviors?

Value Analysis

- Are we looking to reduce costs? In what ways? And for whom?

    - How will it be measured?

- Are we looking to increase revenue?

- Are we looking to reduce risks? Which risks?

- Are we looking to be more competitive? In what ways?

- Are we looking to save someone time?

- Are we looking to provide something to customers that they don't currently have today?

- Are we looking to improve the customer experience with the organization, service, or product? In what ways and how will it be measured?

- Are we looking to simply meet a compliance requirement? Or meet it better than competitors? Or meet it while improving the touch point with customers?

- What business outcomes are we looking to achieve?

Ambiguity and Change

- What are the major assumptions we or the stakeholders are making?

- What are the major risks from the perspective of the various teams involved?

- What hypothesis do we have about the project goals?

- What experiments need to be done to learn and reduce ambiguity?

- What is most likely to change during the project? (For example, requirements, regulations, stakeholders, technology, strategy, external parties)

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Stakeholders

- Who is the sponsor? How engaged and available are they?
- Is the sponsor's vision clear?
- What groups will be impacted and how? Where are they located?
- What groups and users will need to change, and how?
- What groups and users will see or experience something different as a result of the project?
- What end-customer touch points may change or are at risk?
- What external organizations, vendors, experts, and government bodies need to be consulted?

Users

- Will any users see or experience differences in their interactions with the technology or process?
  - List the users and the specific changes.

Business Processes

- What business processes are impacted, and how?
- What users and user interactions/goals will change?
- What technologies are known to be part of these business processes?
- Are there new rules that will impact the process?
- Are job descriptions or responsibilities changing for anyone?

Data

- Is there any new data needed to make the process successful?
- Is any new data needed to be transmitted outside the organization?
- Is any new data coming into the organization?
- Are there any expected changes to existing data?