

Project Scope

by Sophia



WHAT'S COVERED

This lesson introduces the elements of a project scope including:

1. Project Scope Document

When the word "project scope" is mentioned, it includes two things. One is the physical document that defines a project, describes the outcomes, and identifies who has oversight in the project; otherwise known as the **project scope document**. The second focuses on the goals and results of the project.

Once a project manager is assigned to a project, the first step they should take is the creation of a project scope document. Then the details of the project scope can be communicated to project members and stakeholders.

But what goes into a project scope document? Typically, this document answers the following questions: who, what, when, why, and how. This is often called a business case.

Project Scope Document	
WHO	Who are the stakeholders for the project? Who will have decision making authority?
WHAT	What are the deliverables of the project? What are the stakeholders' expectations and requirements for event planning? What are the risks associated with our project?
WHEN	When will the project be complete? When will each phase be complete? When will employees be able to plan events using our new software?
WHY	Why is the project being initiated? Why will we benefit from this project?
HOW	How will the project be managed? How will the project manager handle the work?

IN CONTEXT

An organization launches a project to create event planning software. You are the project manager and must create a project scope document. A few specific questions that may be asked in order to

help guide the document, may be:

1. Who in the organization will determine the requirements?
2. What is the deliverable? Software to manage events? Software to plan events? Both?
3. When will employees be able to plan events using our new software?
4. Why is the project being initiated? To increase event attendance in the organization because notifications are being sent too late?
5. How will the project be managed? Phase-based or iterative development?

If your stakeholders communicate clear requirements, you will likely choose a phase-based development process to ensure each stage is delivered on time.

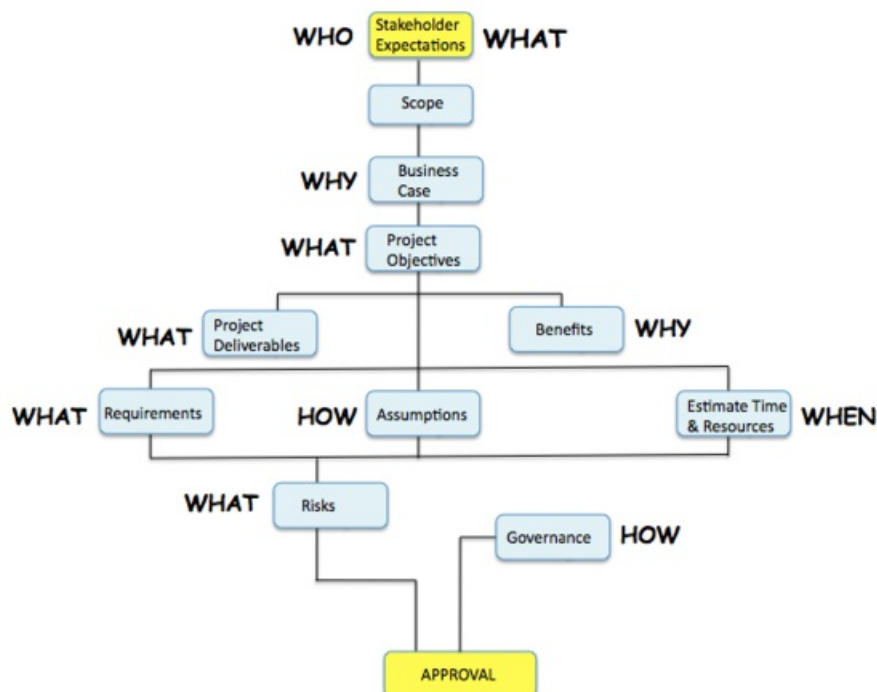
TERM TO KNOW

Project Scope Document

Document that defines a project and provides a framework for identifying project outcomes and project governance.

2. Flow Scope Diagram

The individual pieces of a scope can be outlined in a flow diagram.



Note how the five scope questions are answered during the development of each element:

- Who are the stakeholders?
- What are the deliverables?
- When will the project be complete?
- Why is the project being initiated?

- How will the project be managed?

When the scope document is finally complete, all stakeholders should have the details needed to decide whether a project should move forward or not.

3. Project Charter

In some organizations, a **project charter** will also be created prior to the project scope.



HINT

Think of the project charter as a light version of the project scope; its purpose is to give a project manager authority to start the project.

While all projects should have a scope document, not all projects will have a charter. It's up to the organization whether a charter is necessary. If a project does have a charter and the scope document, the charter is always created first.

Without a charter though, there still needs to be a formal method to kick off the project, and grant authority to the project manager. This could be a meeting between the key principles, or even something as simple as a document or email informing the project manager that they can begin.



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Project Charter

A document that provides an overview of a project and provides a context for deciding whether or not a project should be initiated.



SUMMARY

This lesson covered the details of a **project scope document** including the framework for questions to ask such as, “who will have approval authority?”. A **scope flow diagram** can be a helpful tool to communicate a project, which also answers the scope document questions. And remember, some projects may have a **project charter**, which will always come before the project scope document.

Source: This work is adapted from Sophia author Jeff Carroll.



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Project Charter

A document that provides an overview of a project and provides a context for deciding whether or not a project should be initiated.

Project Scope Document

A document that defines a project and provides a framework for identifying project outcomes and project governance.

