

Gaining Scope Approval

by Sophia



WHAT'S COVERED

This lesson will discuss the process to gain approval for the project scope. Two key elements will be discussed:

1. Project Governance

Project approvals will occur throughout the project for different phases. The project manager is responsible for identifying the stakeholders who will participate in the approval process. The project manager also organizes the materials necessary for approval and delivers those documents to the stakeholders.

Before approvals can occur on phases or deliverables of a project, the **project governance** of the project must be established. This sets the criteria and the rules for the approvals and decisions. It also determines when communications are expected on the project, and who will receive those communications.

One of the key decisions most project managers will face are the changes to the scope. Governance should also establish the change management process and document who must be consulted before changes are made to the project. The project governance helps describe the authority a project manager holds on a project.

On some projects, the project sponsor or other key stakeholders might need to be consulted on each decision. But on others, the project manager may have wider authority. Governance outlines the authority on the project.

➞ **EXAMPLE** An example of project governance might be the project manager will have authority over all decisions that don't impact project scope. But any changes to scope must be approved by the project sponsor first. If governance has been established, then the process for scope approval is also known.

It's the project manager's responsibility to deliver the project scope document and any support documentation necessary to explain the document to the decision makers for approval.

Once the project manager has identified the stakeholders involved in the approval process, those stakeholders will be used throughout the project life cycle. A project manager will track what approvals are needed, and the approval status of each stakeholder.



TERMS TO KNOW

Project Approval

The process used to seek approval by a project manager throughout a project life-cycle; including identifying specific stakeholders that will be involved in the approval process.

Project Governance

Criteria established for managing projects and identifying how decisions will be made, approvals managed and set the rules for managing change.

2. Stakeholder Meetings

It is the responsibility of the project manager to schedule the necessary project approval meetings. The goal of an approval meeting is to sign-off on the project scope.

This might be done in one large meeting with all decision makers, or through a series of smaller meetings with individual stakeholders. A larger group of stakeholders should designate a single representative for this meeting.

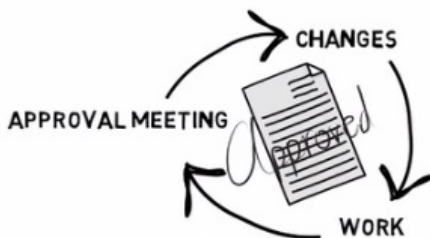


Before each meeting, the project manager should review the scope-- paying particular attention to any areas that impact the stakeholders attending the meeting.

The project manager should guide the stakeholders through the project scope materials with the intention to gain buy-in and, ultimately, project approval.

Sometimes, scope approval meetings result in changes to the project scope document, and even to the project scope. The project manager should then make the appropriate changes and re-initiate the approval process.

Once scope is approved, the project manager can begin project planning.



Approvals at the end of phases are referred to as gates and will occur throughout the project. Gate approval must be reached before the next phase can begin.

In each gate approval, the project manager will provide the project sponsor or key decision makers with the project information necessary to approve the work. During the gate approval process, the project manager presents the current status of the project and reviews any outcomes or deliverables with the project sponsor and stakeholders.

Any changes to the scope or any information on other changes or risks to the project are also presented. The project manager will then seek their approval. If approval is received, the gate is passed and the next phase can begin. If it's not accepted, then work is scheduled to address the outstanding issues. Once that work is complete, the project manager re-initiates the gate approval process.

3. Project Sponsor

It is the project sponsor that has ultimate approval authority. As you might recall, the project sponsor is the person or organization funding or championing the project. This means that the project sponsor must sign off on deliverables, budgets, and schedules. The sponsor will also help support the project with the organization, and seek the resources needed for project success.

It is best if a project has only one sponsor, so the project manager communicates with one person regarding decisions. With multiple sponsors, the project manager might be caught between conflicting opinions, resulting in delays.



SUMMARY

You've learned quite a bit in this lesson. Now you understand what **project governance** is and how clear communication regarding approval authority is crucial. **Stakeholder meetings** are scheduled by the project manager with the intent of project approval. You also learned that the project sponsor is the ultimate authority on the project.

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



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