Chapter 4: Scope Management

Notes

- Organising Committee for International Conference falling behind in getting event planned
- Missing key information about how they were approaching the planning and management of the conference
- Planning files from last year – past not always a good predictor of the future. The committee had copied the briefing information from last year. Past conferences had not matched the expectations of some stakeholders
- Need a scope document that captured what the conference was about, the board and CEO's expectations and how information would be gathered, validated, managed and controlled
- Managers hard to get in contact with – need different techniques to gather details
- Need a formal documented change-control process

Case Study

1. Why was documenting a scope management plan an important issue for Ian and the committee in shaping the project's over-arching objective and ultimate success?

- The scope management plan should include information on the project's boundaries and how the scope will be dealt with throughout the project.
- A scope management plan will serve as a guide to ensure that:
  a) The scope is clearly defined and includes key information to ensure that the conference meets expectations of the board, the CEO, and other stakeholders.
  b) The scope management plan will ensure that the scope can be managed and controlled proactively. Scope management establishes control mechanisms to address factors that may result in changes during the project lifecycle.
  c) The scope management plan will ensure a common understanding between everyone, including project team and attendees.
  d) The scope management plan will capture inclusions and exclusions.

2. Why is it important to cite the exclusions in all scoping documentation?

- Project exclusions are those things that are outside the project boundaries. It explicitly states what is not included in the project. It is crucial to limit the scope and stakeholder's expectations and clearly define what the project will actually deliver.
- With exclusions the present danger is that these are 'assumed' by the client to be included in the project when in fact they would incur additional funding, time and require further resourcing decisions to be made. Ultimately, unless you expressly take these off the table, the client believes they are included.
- What you fail to explicitly take off the scope table bounded by time, money and resources at any point in time, you may well end up donating to the client with your own time and money.

3. What requirement-gathering techniques could Ian access in the context of his stakeholder availability?

- Questionnaires/Interviews/Email communication with stakeholders that are unavailable for face-to-face meetings.
- Brainstorming workshops with the project team to reconcile differences in thinking about what scope management involves, and what the project scope includes.
- Document analysis/review taking into account past conference document and noting where mistakes were made and how to fix them.

4. How could Ian and his committee work throughout the project side by side with their clients and the stakeholder to ensure handover wasn't jeopardized?
    - Instate a good formal and agreed-upon scope control process. The purpose is not to limit the scope, but to ensure that when it changes, everyone is aware, has a common understanding and accepts the changes.
    - Stakeholder Management - assess influence, understand their expectations, keep stakeholders involved and informed.
    - Stakeholder Analysis – to define your strategies to improve support.

5. What scope creep triggers should Ian watch out for throughout the conference project? (See Table 4.5)
    - Creep is when original scope changes over the life cycle of project. Inevitable due to changing expectations of stakeholders.
    - Imprecise language with a lack of detail in describing the work - Open to interpretation, so assumptions made
    - Widely inaccurate estimates (time and cost) - Stakeholders will pressure you to stick to original estimates
    - Failing to get third party review - No insight from external parties
    - No pattern, structure or chronological order - Conflicting resource assignments
    - Omitting special instructions and/or ignoring them - Non-compliance, workplace health and safety issues
    - Lack of user involvement - Imprecise requirements, delays with rework
    - Insufficient planning time - Development of an ad hoc schedule, at the mercy of unanticipated changes
    - Unavailability of resources - Delays in work, cost variations

6. Given that the project (should) produce innovation and continuous improvement over time, why does the scope need to be controlled?
    - The scope needs to be controlled so that when the scope evolves, changes are approved, and properly implemented with the necessary project changes.
    - This way, everyone has the same expectations, and all expectations are met when the project is delivered.

7. How can Ian both manage and control the scope changes when they first appear?
    - Define, Document, and Communicate a structured approach to requesting, evaluating, and approving change requests
    - Change control protocol: Insert a concise change request protocol into the project proposal, project plan and project report documentation
    - Pre-warn stakeholders that the scope baseline will probably change at some stage
    - Communicate the actions these stakeholders will be required to make
    - Develop the change request template that will be adhered to for all change request
    - Compile a variation register to track all change request and approvals
    - Produce timely technical, time and cost variation reports
    - Regularly update all plans with actual data against the plan
    - Communicate all proposed changes to the relevant stakeholder for assessment
    - Map proposed changes into the project schedule, budget, resource pool, risk register, quality plan and contract for a thorough impact analysis.
    - Dictate that all scope change request (and directives) are in writing
    - Ensure that all scope changes identify (and are signed by) the stakeholder initiating the change
    - Reflect all successful scope changes in a revised project schedule, budget, risk register and other associated documentation.

Chapter 5: Time Management

Notes

- Superintendent for Blackwood Coal believed large capital project was behind in schedule
- Project had poor scheduling, poor work performance and poor management
- All parties had agreed to the practical completion date when the tender was awarded – project start/end date were revised and brought forward
- Contractor DWI did not issue schedule updates and did not include a critical path
- Superintendent uneasy about how the work was being delivered and managed
- He assumed as the company's representative, he would be involved in the ongoing monitoring, reporting, adjusting and controlling of the schedule
- Mike was unsure what his role and involvement was in proactively managing the schedule and didn't want to be seen as helping the contractor

Case Study

1. How would a schedule management plan have helped Mike's project from day one?

- A Schedule Management Plan is the process of establishing the policies, procedures, and documentation for planning, developing, managing, executing, and controlling the project schedule.
- A schedule management plan would ensure that time management considerations are integrated into the project. It would ensure that the project can be controlled as required, so that time constraints are met.

2. Does Mike have the right to dictate to DWI the level of decomposition in presenting reports to Blackwood?

- Yes, depending on the design and construction contract. He should have made it clearer in the contract however rather than assuming later that he had the right.
- As the company's representative he has the right to be involved in the on-going monitoring, reporting, adjusting and controlling.

3. Should Mike adopt the suggestion that critical path and PC be in all Gantt charts and reports, and why?

- Yes, critical path and project completion should be in all Gantt charts and reports in order to set clear goals, objectives and deadlines that need to be met.
- A critical path is a sequence of tasks that must be finished before the project can be finished and in some cases a task must be finished before the next dependent one can start
- Critical path will be useful to monitor the project completion date, as it will give the maximum amount of time remaining to complete the project. It will also help recognize bottlenecks such that appropriate measures can be put in place.
- Critical path analysis should consider project delays so that the effects of changes to the project are reflected in the project schedule. Critical path analysis will also allow attention to be focused on important areas of the project (areas where there can be no compromise in time duration).

4. What is the value of updating the Gantt chart and re-circulating this to all stakeholders?
    - The GANTT chart is easy to read, and is the ideal tool for monitoring progress to date and setting priorities
    - Recirculation will ensure all stakeholders are aware of the progress of the project so there will be common understanding between stakeholders and expectations are kept in check. Your clients can visually see each stage of the project and have a better understanding of the project and key milestones.
    - It is also crucial to compare the projected progress to the real progress and then update the chart accordingly.

5. Would assessing progress, status and forecast data have helped Mike co-manage the schedule more proactively?
    - Yes. Unless we know the current status of the project we can't move forward. Proactively managing the schedule means comparing progress to date with expected progress, and re-allocating resources, or reworking the project schedule as required.
    - This will ensure that the project does not fall to far behind, and that stakeholders are kept informed, and share a common understating of project progress and potential risks.
    - We can identify scheduling bottlenecks while tracking the schedule. This helps us in taking corrective actions for past bottlenecks and preventive actions for future similar bottlenecks
    - We can identify past problems and schedule slippages while tracking. By analysing these we can determine the root cause and prevent similar types of problems from happening in future.