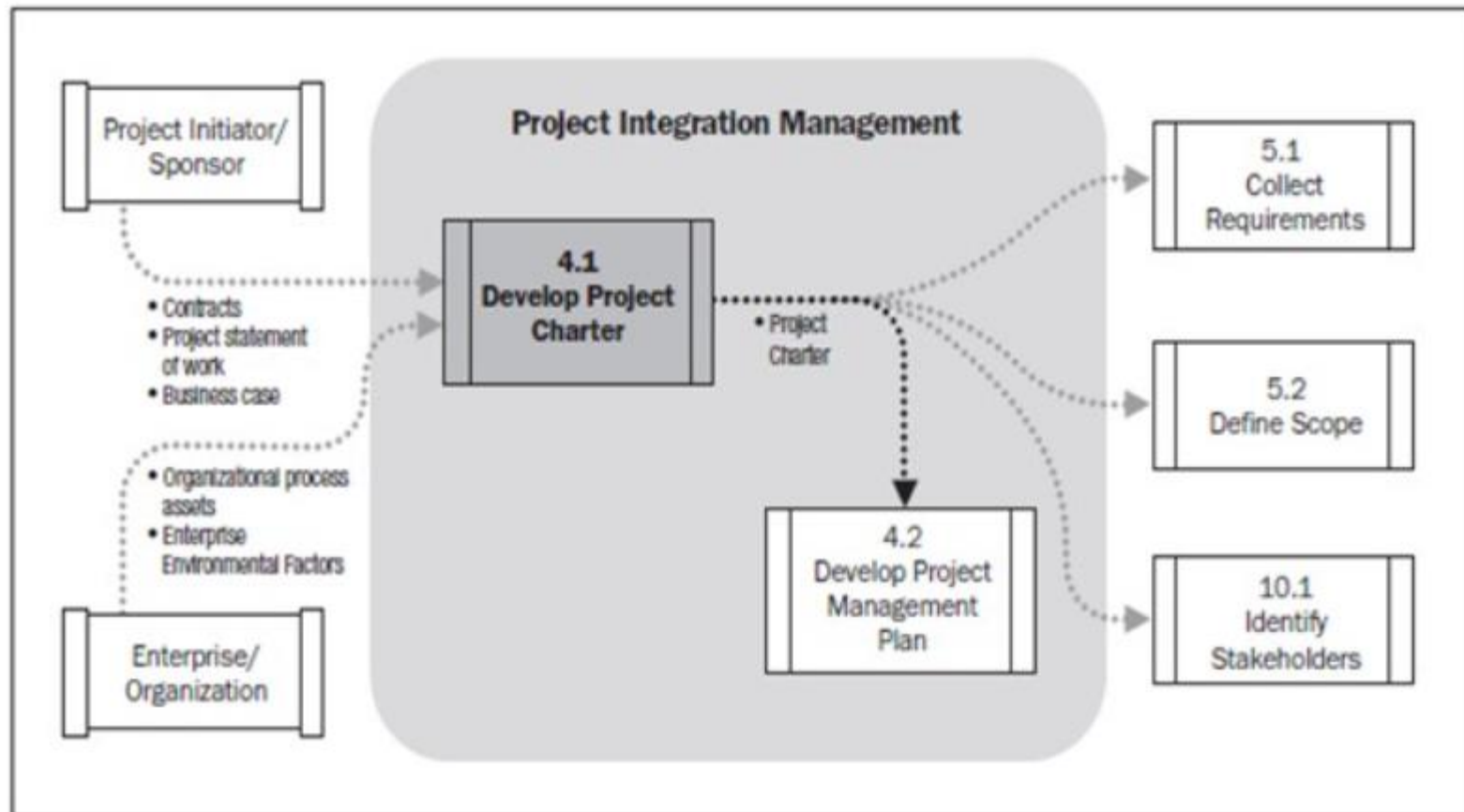*"Running a project without a work breakdown structure is like going to a strange land without a road map" – J Phillips*

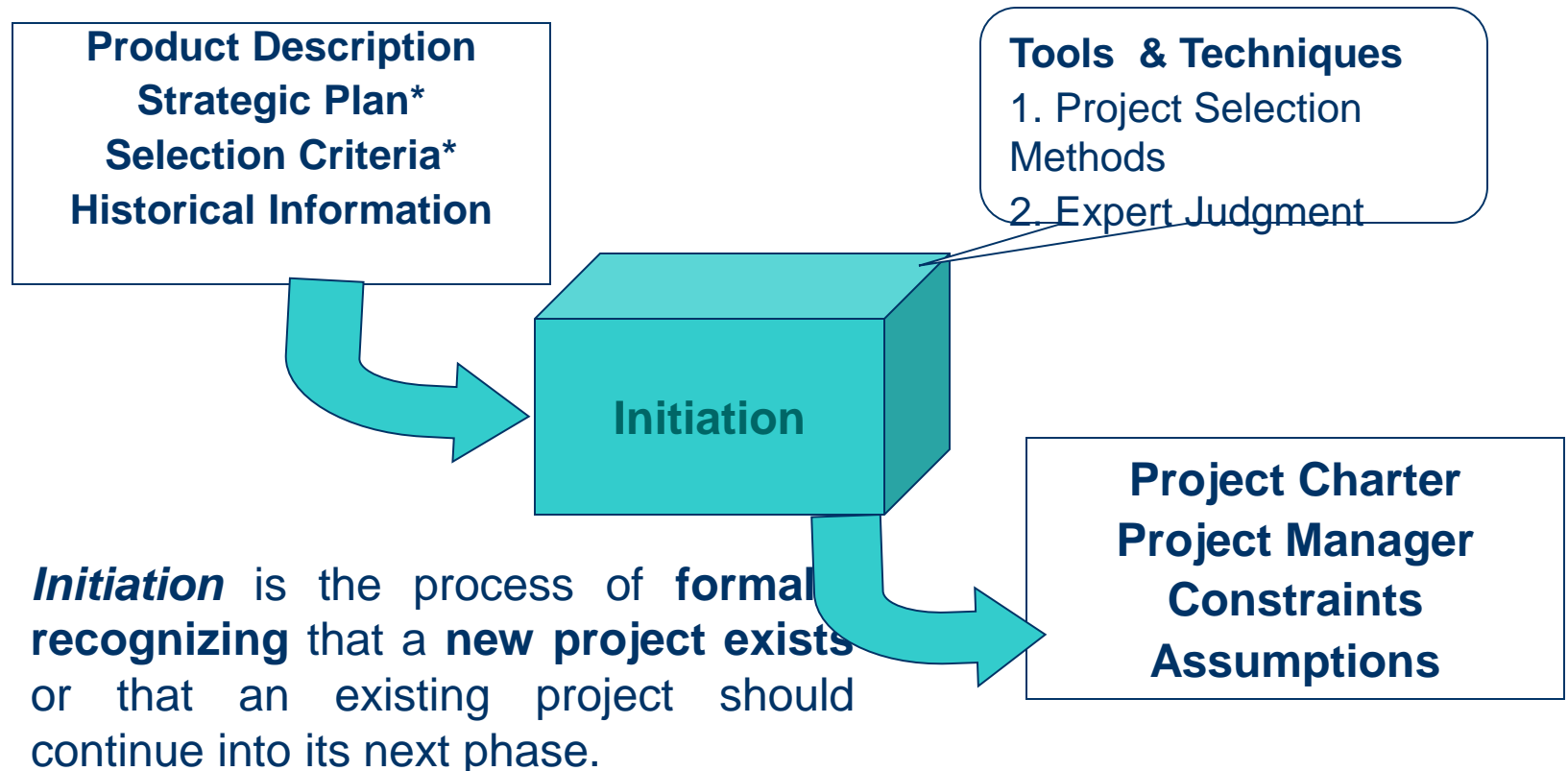**Defining and controlling what is or is not included in the project.**

Project Scope Management Lecture

4.1 Develop Project Charter Data Flow Diagram

1. Initiation

**Product Description
Strategic Plan*
Selection Criteria*
Historical Information**

Tools & Techniques
1. Project Selection Methods
2. Expert Judgment

Initiation

**Project Charter
Project Manager
Constraints
Assumptions**

Initiation is the process of **formal recognizing** that a **new project exists** or that an existing project should continue into its next phase.

Statement of Work (SOW)

A statement of work (SOW) is a **document** that provides a description of a given **project's requirements**. It defines the **scope of work** being provided, **project deliverables**, **timelines, work location, and payment terms and conditions**

Statement of Work (SOW)

- A formal project definition document
- **SOW and Project charter are often used interchangeably**
- It provides basis for the rest of the formal detailed project plan
- It contains
  - The purpose of statement/ What is the project and what are the objectives?
  - The scope statement*
  - The project deliverables
  - The goals and objectives
  - The cost and schedule estimates
  - List of stakeholders
  - The **chain of command**
  - **Assumptions** and agreements
 - The **communication plan**

Project Scope Statement Example

Project Name	IVR Project		
Project Sponsor	Dave Sponsor	Project Manager	Alice Michaels
Date of Project Approval	08 March 2015	Last Revision Date	08 March 2015
Scope Description	IN SCOPE: - An IVR system to handle and direct sales calls. - Setup of the IVR system ready to handle all sales enquiries - Training for the sales team on how to use the system - An administration system so the IVR system can be configured by the sales team OUT OF SCOPE: - Support for any other team other than sales - The ability to route complex sales enquiries, such as partnerships etc.		
Project Deliverables	- A customer facing IVR system - An IVR configuration system - A training manual for new and existing sales team members		
Acceptance Criteria	The project will be accepted when it is agreed by the sale team that the deliverables meet their needs (deliverables signed off). The project will also be considered a success if post launch testing shows that customer satisfaction is over 5 points higher than where it is now.		
Constraints	The sales team are not dedicated to this project, and must fit this around their day-to-day sales jobs.		
Assumptions	A sales team & full project team will be available to co-create the WBS		

Interactive voice response

Constraints and Risks

- Constraints are the real-world limits on the possibilities for your project
  - Rs.50,000 to buy a server
- Dictionary Definition of risk
  - the possibility of loss or injury
- Risk theorists
  - the potential for realization of unwanted, negative consequences of an event.
- Risk involves the likelihood that an undesirable event will occur as well as the severity of the consequences of the event should it occur
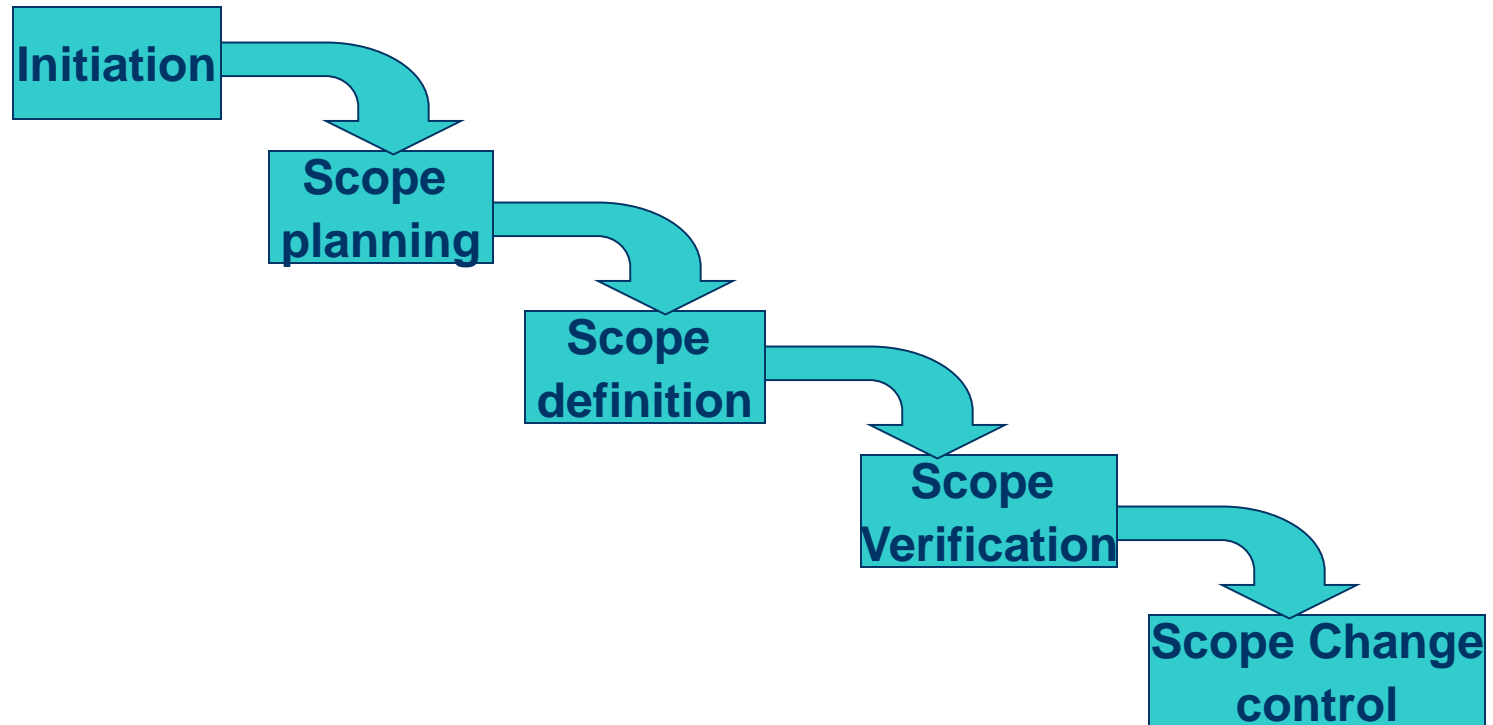
Types of Risk
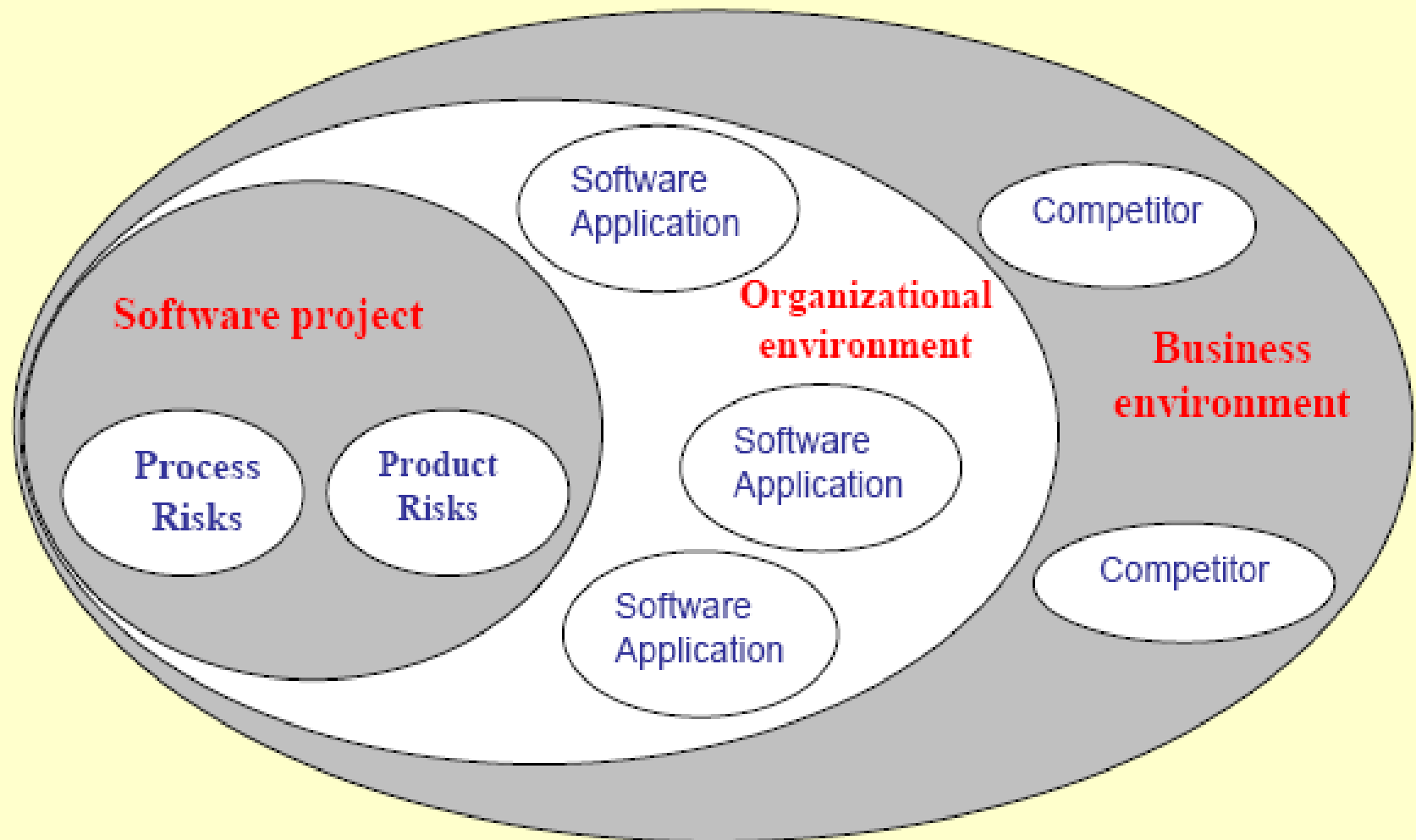
Constraints to consider

- The budget
- The schedule
- The people
- The real world (holidays/events/cultures)
- Facilities and equipment (environment)

Project Scope Management

Initiation

Scope planning

Scope definition

Scope Verification

Scope Change control

"Scope": Defining and controlling what is or is not included in the project.
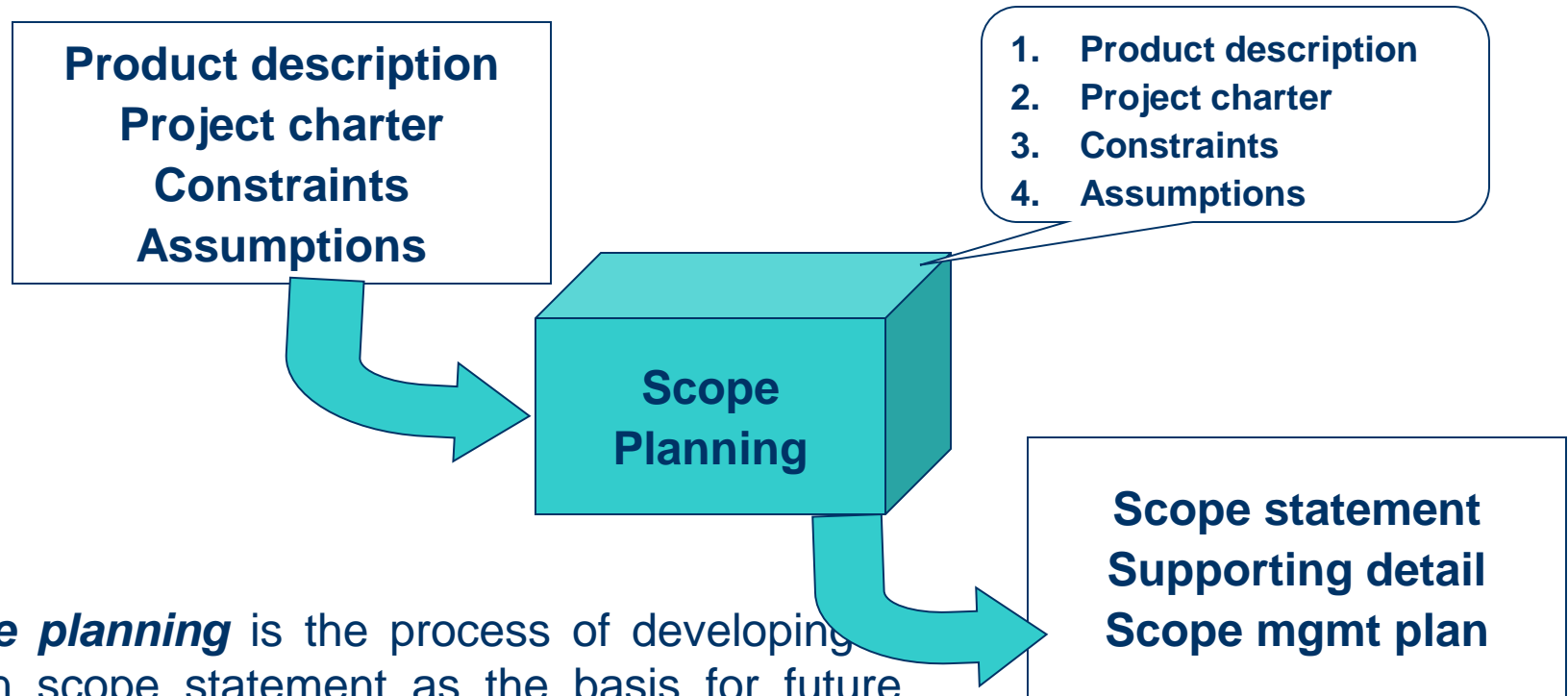
The term may refer to:

1.Product Scope:

Product scope - the features and functions that are to be included in a product or service.

- is defined in the product requirements and is the subject of the product life cycle

2.Project Scope:

- Project scope the work that must be done in order to deliver a product (with the specified features and functions).

- is defined in the project charter and is the subject of the project plan

2. Scope Planning:

Product description
Project charter
Constraints
Assumptions

1. **Product description**
2. **Project charter**
3. **Constraints**
4. **Assumptions**

Scope Planning

Scope statement
Supporting detail
Scope mgmt plan

Scope planning is the process of developing written scope statement as the basis for future project decisions including, in particular, the criteria used to determine if the project or phase has been completed successfully.

2. Scope Planning:

Scope planning is the process of **developing a written scope** statement as the basis for **future** project decisions including, in particular, the **criteria** used to determine if the project or phase has been completed successfully.
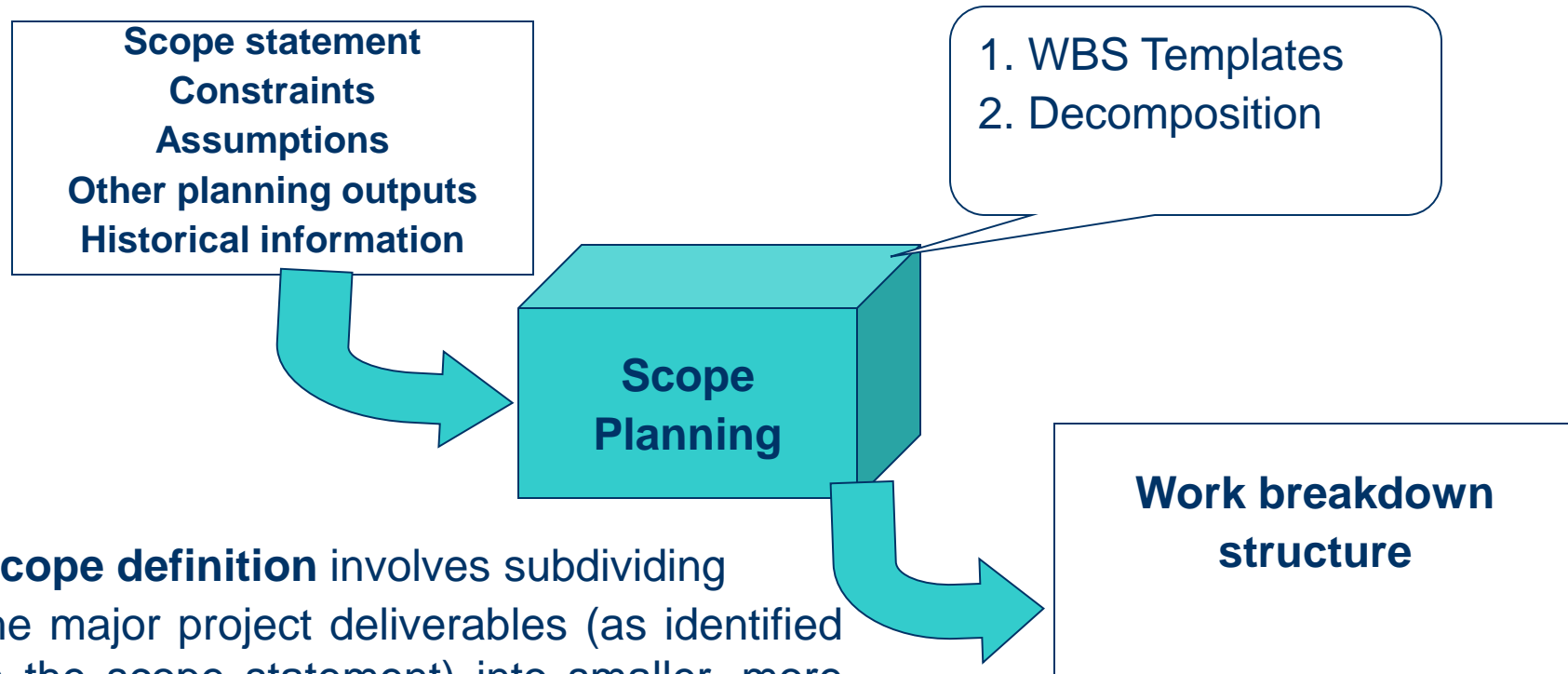
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1. Scope statement

A **documented basis** for making **future project decisions** and for **confirming or developing common understanding of project scope among the stakeholders.**

A document that defines the project's scope. Defining scope, which is really the heart of the initiation phase

Scope Statement

- The scope statement **should include**:
  - **Project justification**— the **business need** that the project was
  - undertaken to address.
  - **Project product** (**characteristics**/requirements of **products**/ services).
  - **Project deliverables** (Proj. plan, WBS, Estimation…)
  - **Project objectives**- the quantifiable criteria that must be met for the project to be considered successful.
- **Example:** project might be considered success if 90% of all employees have computers and are capable of using new Internet system under development within 9 months and for no more $1.5m).
- Project objectives must include, at least, cost, schedule, and quality measures

3. Scope Definition:

Scope statement
Constraints
Assumptions
Other planning outputs
Historical information

1. WBS Templates
2. Decomposition

Scope Planning

Work breakdown structure

Scope definition involves subdividing the major project deliverables (as identified in the scope statement) into smaller, more manageable components

3. Scope Definition:

Scope definition involves subdividing the major project deliverables (as identified in the scope statement) into smaller, more manageable components

Purpose of Scope Definition:

• Improve accuracy of cost, time, and resource estimates.

• Define a baseline for performance measurement and control.

• Facilitate clear responsibility assignments.

Scope Verification:

- **Scope creep:** Tendency of project scope to keep getting bigger and bigger-> keep this in check for better project monitoring and control.

SCOPE VERIFICATION:

- Formal acceptance of project scope by stakeholders.

- Project team must develop clear documentation of project's products and procedures for evaluating if they were completed correctly and satisfactorily.

Scope change control:

- Controlling changes to project scope.

- In order to minimize scope change control-> do a good job of verifying project scope.

Project Overview Statement (POS)

The POS is a short document (ideally one page) that concisely states **what is to be done in the project**, why it is to be done, and what business value it will provide to the enterprise when completed

Project Overview Statement (POS)

Purpose:

To secure senior management approval

Size:

Ideally one page; states what is to be done, why it is to be done. What business value it will provide

Five Components:

1) Problem/opportunity

2) Project Goal

3) Project Objectives

4) Success Criteria

5) Assumptions, risks, obstacles

Project Definition Statement (PDS)

PDS Is similar to POS but more detailed and for development team (project manger and team) Just like **POS** is for **customer and PM**.

POS/PDS* Form

Project Overview Statement*	Project Name	Project No.	Project Manager

Problem/Opportunity

Goal

Objectives

Success Criteria

Assumptions, Risks, Obstacles

Prepared by	Date	Approved by	Date