

SCOPE MANAGEMENT

A General Look

SCOPE MANAGEMENT

A General Look

Scope

→ The work we will do

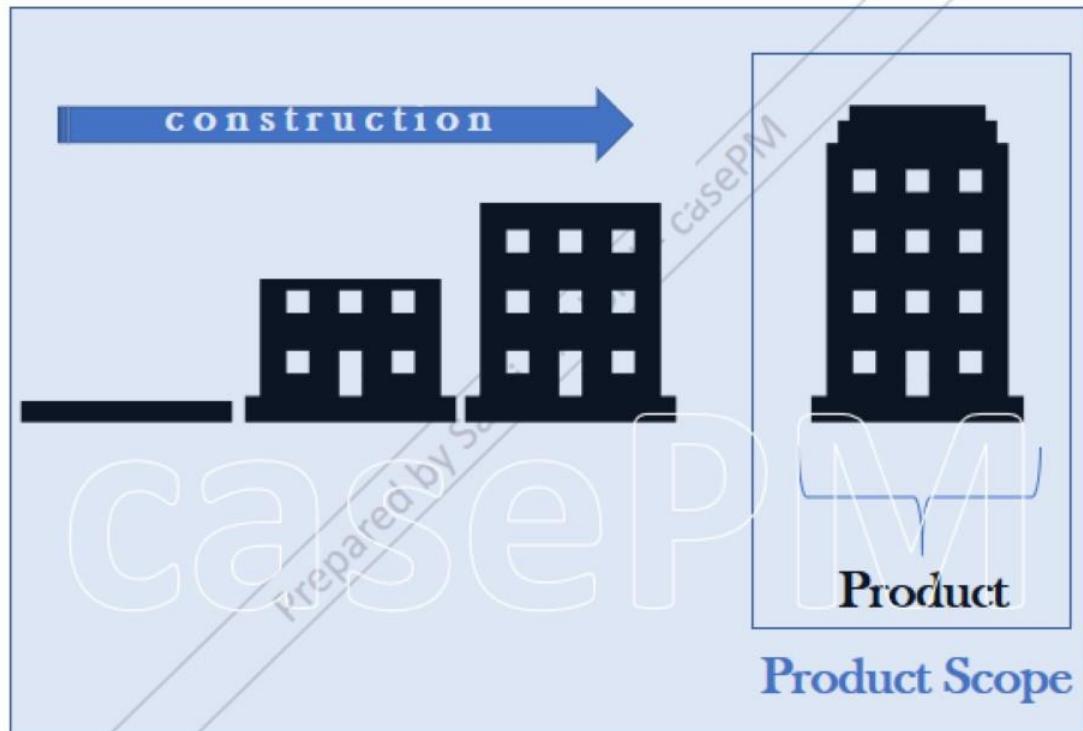
Two major rules of Scope Management:

- 1) Don't do less than written in the Scope
- 2) Don't do more than written in the Scope

SCOPE MANAGEMENT

A General Look

Product Scope vs Project Scope



Project Scope

SCOPE MANAGEMENT

A General Look

Scope Management

	Initiating	Planning	Executing	Monitoring & Controlling	Closing
Scope Management	0	4	0	2	0

- ➔ Plan Scope Management // Planning
- ➔ Collect Requirements // Planning
- ➔ Define Scope // Planning
- ➔ Create WBS // Planning
- ➔ Validate Scope // M&C
- ➔ Control Scope // M&C

SCOPE MANAGEMENT

Plan Scope Management

SCOPE MANAGEMENT

Plan Scope Management

Plan Scope Management

- ➔ Plan how to manage and control the scope and requirements
- ➔ We don't create the scope!

Two plans are created:

- Scope Management Plan
- Requirements Management Plan

SCOPE MANAGEMENT

Plan Scope Management

Scope Management Plan

→ A component of the Project Management Plan

Includes the information about how to:

- Plan, execute and control the Project Scope
- Complete the project within the desired scope
- Create a detailed Project Scope Statement
- Approve the scope baseline
- Produce the Work Breakdown Structure
- Get the deliverables approved

SCOPE MANAGEMENT

Plan Scope Management

Requirements Management Plan

→ A component of the Project Management Plan

Requirement: Stakeholders' expectations on the outcomes of the Project.

Ex: The home page of the web site should be loaded in less than 2 seconds

Ex: The speed of the elevators should be 2m/s or faster

SCOPE MANAGEMENT

Plan Scope Management

Requirements Management Plan

➔ A component of the Project Management Plan

Includes the information about how to:

- Identify, analyze, document and manage the requirements

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Plan Scope Management Process

What Do We Need? What Do We Use? What Do We Get?

SCOPE MANAGEMENT

Plan Scope Management

What do we get?

- Scope Management Plan
- Requirements Management Plan

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SCOPE MANAGEMENT

Plan Scope Management

What do we need?

- Project Charter

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SCOPE MANAGEMENT

Plan Scope Management

What do we need?

- Quality Management Plan

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SCOPE MANAGEMENT

Plan Scope Management

What do we need?

- Project Life Cycle Description

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Plan Scope Management

What do we need?

- Development Approach

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SCOPE MANAGEMENT

Plan Scope Management

- Quality Management Plan
- Project Life Cycle Description
- Development Approach

Project
Management
Plan

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SCOPE MANAGEMENT

Plan Scope Management

What do we get?

- Scope Management Plan
- Requirements Management Plan

What do we need?

- Project Charter
- Quality Management Plan
- Project Life Cycle Description
- Development Approach

Project
Management
Plan

Scope Management Plan and the Requirements Management Plan are the components of the Project Management Plan, then how come we need a plan which is not created yet?

SCOPE MANAGEMENT

Plan Scope Management

What do we get?

- Scope Management Plan
- Requirements Management Plan

What do we need?

- Project Charter
- Quality Management Plan
- Project Life Cycle Description
- Development Approach

Project
Management
Plan

Scope Management Plan and the Requirements Management Plan are the components of the Project Management Plan, then how come we need a plan which is not created yet?

Plan Scope Management process is an iterative process

SCOPE MANAGEMENT

Plan Scope Management

What do we need?

- Enterprise Environmental Factors
- Organizational Process Assets

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SCOPE MANAGEMENT

Plan Scope Management

What do we use?

- Expert Judgment

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SCOPE MANAGEMENT

Plan Scope Management

What do we use?

- Alternatives Analysis (Data Analysis)

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Plan Scope Management

What do we use?

- Meetings

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SCOPE MANAGEMENT

Collect Requirements

SCOPE MANAGEMENT

Collect Requirements

Requirements of all of the stakeholders need to be collected.

Missed requirements may cause rework. The project may be stopped due to a forgotten requirement.

Collect Requirements (Project Work & Product)

- Determine the detailed requirements (quality requirements, requirements due to law, PMO requirements, other organizational requirements for the project)
- Document the requirements
- Manage the requirements

Don't consider the requirements not meeting the Project objectives and the Business Case!

SCOPE MANAGEMENT

Collect Requirements

As a result of this process, we create:

- **Requirements Document**
- Requirements Traceability Matrix

Requirements Document

- All of the requirements should be clear
- Requirements need to be measurable
- Requirements need to have acceptance criterion

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Project Name:

Preparation Date:

REQUIREMENTS TRACEABILITY MATRIX

casePM

SCOPE MANAGEMENT

Collect Requirements

As a result of this process, we create:

- Requirements Document
- Requirements Traceability Matrix

Requirements Traceability Matrix

- ➔ A matrix that helps to track the requirements
- ➔ Links the requirements to the project needs and objectives
- ➔ May include the information about the source and the status of the requirement
- ➔ May include the information about who is responsible for the requirement

Collect Requirements Process

What Do We Need? What Do We Use? What Do We Get?

SCOPE MANAGEMENT

Collect Requirements

What do we get?

- Requirements Documentation

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SCOPE MANAGEMENT

Collect Requirements

What do we get?

- Requirements Traceability Matrix

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Project Charter

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Requirements Management Plan

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Scope Management Plan

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Stakeholder Engagement Plan

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SCOPE MANAGEMENT

Collect Requirements

- Requirements Management Plan
- Scope Management Plan
- Stakeholder Engagement Plan

Project
Management
Plan

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Assumption Log

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Lessons Learned Register

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Stakeholder Register

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SCOPE MANAGEMENT

Collect Requirements

- Assumption Log
- Lessons Learned Register
- Stakeholder Register

Project
Documents

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Business Case (Business Document)

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Agreements

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SCOPE MANAGEMENT

Collect Requirements

What do we need?

- Enterprise Environmental Factors
- Organizational Process Assets

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Expert Judgment

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Data Gathering (Brainstorming, Interviews, Focus Groups, Questionnaires and Surveys, Benchmarking, etc.)

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SCOPE MANAGEMENT

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Document Analysis (Data Analysis)

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Decision Making (Voting, Multicriteria Decision Analysis, Autocratic Decision Making, etc.)

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Decision Making (**Voting**, Multicriteria Decision Analysis, Autocratic Decision Making, etc.)

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Decision Making (**Voting**, Multicriteria Decision Analysis, Autocratic Decision Making, etc.)

There are 3 ways of evaluating the votes and then making the decision:

- 1) Unanimity
- 2) Majority
- 3) Plurality

SCOPE MANAGEMENT

Collect Requirements

What do we use?

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Decision Making (Voting, Multicriteria Decision Analysis, **Autocratic Decision Making**, etc.)

➔ If single person makes the decision for the group this is called the Autocratic Decision Making.

SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Data Representation (Affinity Diagrams, Mind Mapping, etc.)

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Data Representation (**Affinity Diagrams**, Mind Mapping, etc.)

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Project Name:

Preperation Date::

AFFINITY DIAGRAM (for Collect Requirements process)

Material	Design	Safety	PMO	Appearance
Requirement 1	Requirement 1	Requirement 1	Requirement 1	Requirement 1
Requirement 2	Requirement 2	Requirement 2	Requirement 2	Requirement 2
Requirement 3	Requirement 3	Requirement 3	Requirement 3	Requirement 3
	Requirement 4	Requirement 4	Requirement 4	Requirement 4
	Requirement 5	Requirement 5		Requirement 5
	Newly identified requirement	Requirement 6		Requirement 6
	Newly identified requirement	Requirement 7		Newly identified requirement
		Requirement 8		Newly identified requirement
		Newly identified requirement		Newly identified requirement

SCOPE MANAGEMENT

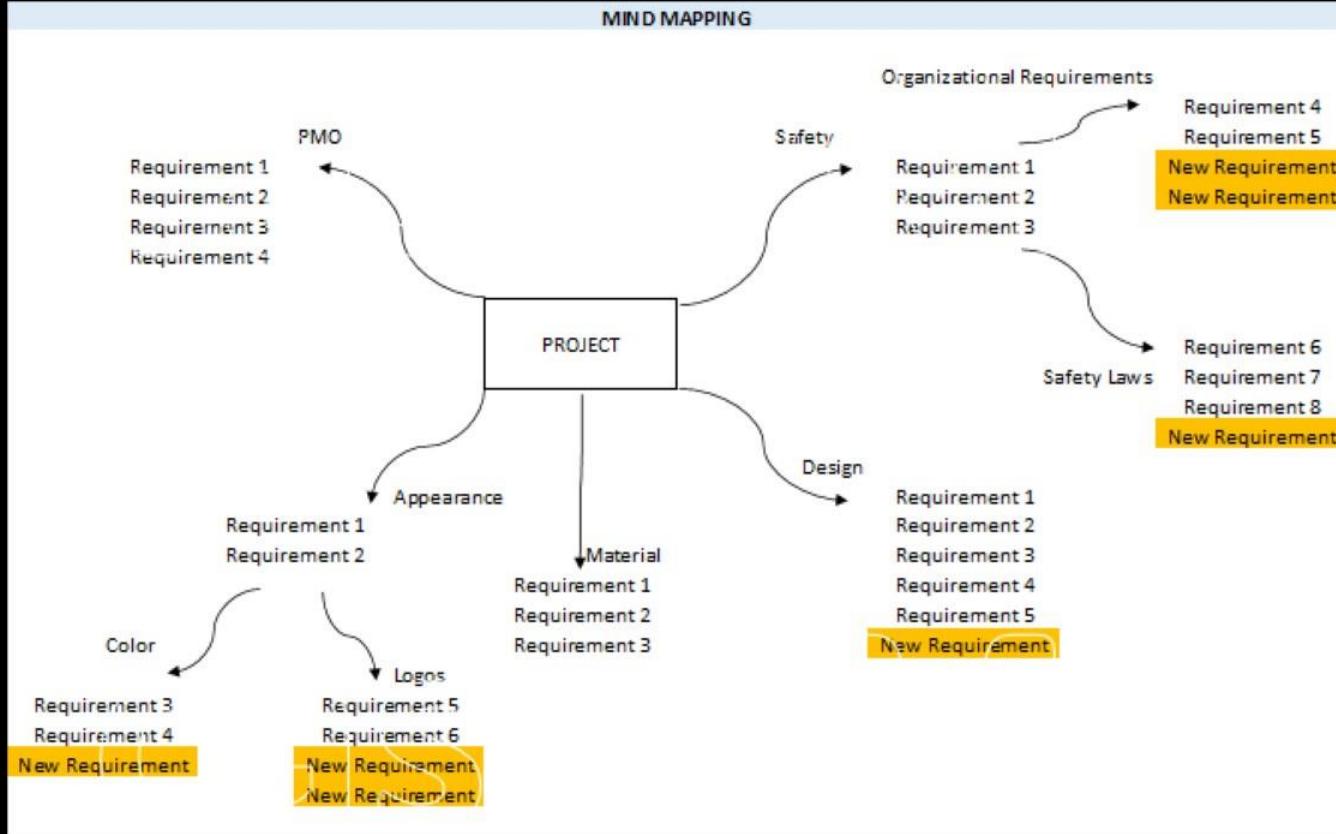
Collect Requirements

What do we use?

- Data Representation (Affinity Diagrams, Mind Mapping, etc.)

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MIND MAPPING



SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Interpersonal and Team Skills (Nominal Group Technique, Observation and Conversation, Facilitated Workshops, etc.)

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Interpersonal and Team Skills (**Nominal Group Technique**, Observation and Conversation, Facilitated Workshops, etc.)

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Interpersonal and Team Skills (Nominal Group Technique, Observation and Conversation, **Facilitated Workshops**, etc.)

Facilitation may be used for:

- User Stories
- Joint Application Design/Development (JAD)
- Quality Function Deployment (QFD)

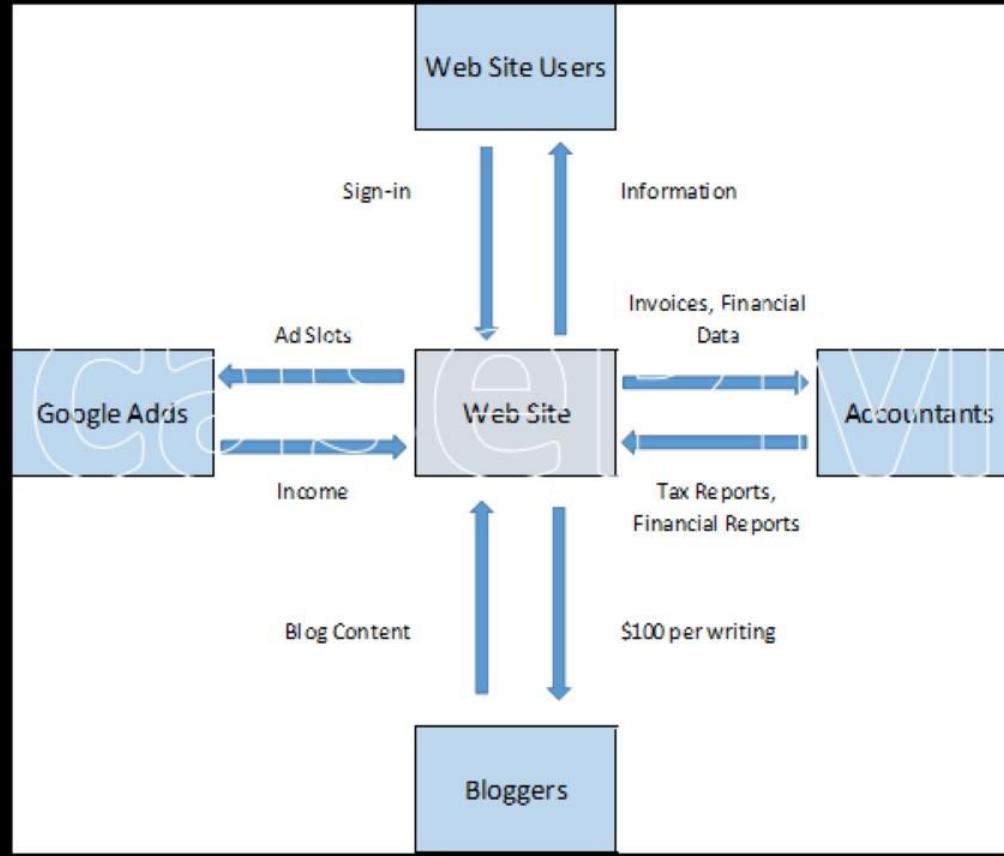
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Collect Requirements

What do we use?

- Context Diagram

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SCOPE MANAGEMENT

Collect Requirements

What do we use?

- Prototypes

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Collect Requirements Process

Dealing with Competing Requirements and Balancing

SCOPE MANAGEMENT

Collect Requirements

Dealing With Competing Requirements and Balancing

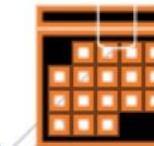
Requirements



Scope



Schedule



Budget



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SCOPE MANAGEMENT

Collect Requirements

Dealing With Competing Requirements and Balancing

Ex: The sponsor wants to complete the project 6 months earlier than what is planned. Since the Project Manager knows that he will need extra resources, he wants to increase the budget of the project by \$3,000,000. But the Sponsor doesn't want to increase the budget.

- Competing Requirements need immediate action
- Stakeholder Requirements should be balanced

SCOPE MANAGEMENT

Collect Requirements

To balance the stakeholder requirements:

- Rank the requirements according to their relevance on:
 - 1) The Business Case
 - 2) The Project Charter
 - 3) The Project Constraints
 - 4) The Project Scope Statement
- Customer requirements will have higher priority
- Resolve the requirement conflicts
- Use the negotiation and the facilitation techniques
- Ask the support of higher management for the conflicts which can't be resolved

SCOPE MANAGEMENT

Define Scope

SCOPE MANAGEMENT

Define Scope

Define Scope Process

- ➔ The scope of the Project and the Product are defined
 - ➔ The deliverables of the Project and the work needed to produce these deliverables are described.
 - ➔ What is in, what is out? (Boundaries of the Project are determined)
 - ➔ Acceptance criteria is determined
 - ➔ Assumptions and constraints are determined
- * For an adaptive environment, the scope is less detailed at the beginning, then it gets detailed after iterations.

SCOPE MANAGEMENT

Define Scope

Define Scope Process

- ➔ The scope of the Project and the Product are defined
- ➔ The deliverables of the Project and the work needed to produce these deliverables are described.
- ➔ What is in, what is out? (Boundaries of the Project are determined)
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Project Scope Statement

Project Scope Statement

WBS Dictionary

WBS

Scope Baseline

Define Scope Process

What Do We Need? What Do We Use? What Do We Get?

SCOPE MANAGEMENT

Define Scope

What do we get?

- Project Scope Statement

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SCOPE MANAGEMENT

Define Scope

What do we get?

- Revisions in:
 - Requirements Documentation
 - Requirements Traceability Matrix

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SCOPE MANAGEMENT

Define Scope

What do we get?

- Revisions in:
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Requirements



Scope



Schedule



Budget



SCOPE MANAGEMENT

Define Scope

What do we get?

- Revisions in:
 - Requirements Documentation
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 - Assumption Log

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SCOPE MANAGEMENT

Define Scope

What do we get?

- Revisions in:
 - Requirements Documentation
 - Requirements Traceability Matrix
 - Assumption Log
 - Stakeholder Register

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SCOPE MANAGEMENT

Define Scope

What do we get?

- Revisions in:
 - Requirements Documentation
 - Requirements Traceability Matrix
 - Assumption Log
 - Stakeholder Register

Project
Documents

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SCOPE MANAGEMENT

Define Scope

What do we need?

- Project Charter

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SCOPE MANAGEMENT

Define Scope

What do we need?

- Scope Management Plan (Part of the Project Management Plan)

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SCOPE MANAGEMENT

Define Scope

What do we need?

- Assumption Log

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SCOPE MANAGEMENT

Define Scope

What do we need?

- Requirements Documentation

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SCOPE MANAGEMENT

Define Scope

What do we need?

- Risk Register

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SCOPE MANAGEMENT

Define Scope

- Assumption Log
- Requirements Documentation
- Risk Register

} Project
Documents

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Define Scope

What do we need?

- Enterprise Environmental Factors
- Organizational Process Assets

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Define Scope

What do we use?

- Expert Judgment

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SCOPE MANAGEMENT

Define Scope

What do we use?

- Alternatives Analysis (Data Analysis)

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SCOPE MANAGEMENT

Define Scope

What do we use?

- Multicriteria Decision Analysis (Decision Making Analysis)

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SCOPE MANAGEMENT

Define Scope

What do we use?

- Facilitation (Interpersonal and Team Skills)

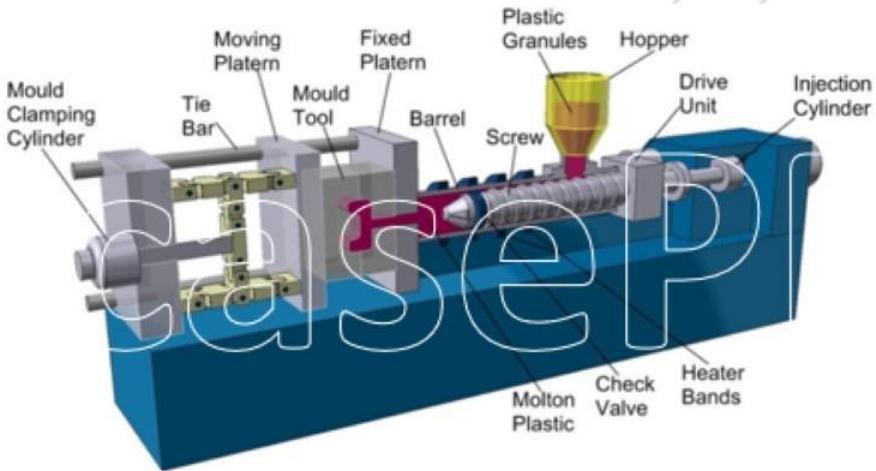
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Define Scope

What do we use?

- Product Analysis



Prepa

SCOPE MANAGEMENT

Define Scope

What do we use?

- Product Analysis

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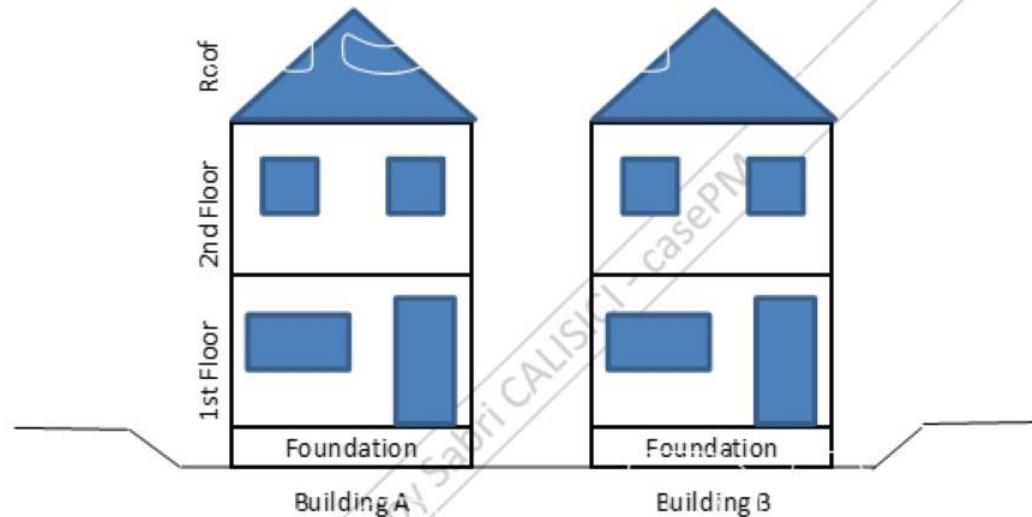
SCOPE MANAGEMENT

Create WBS

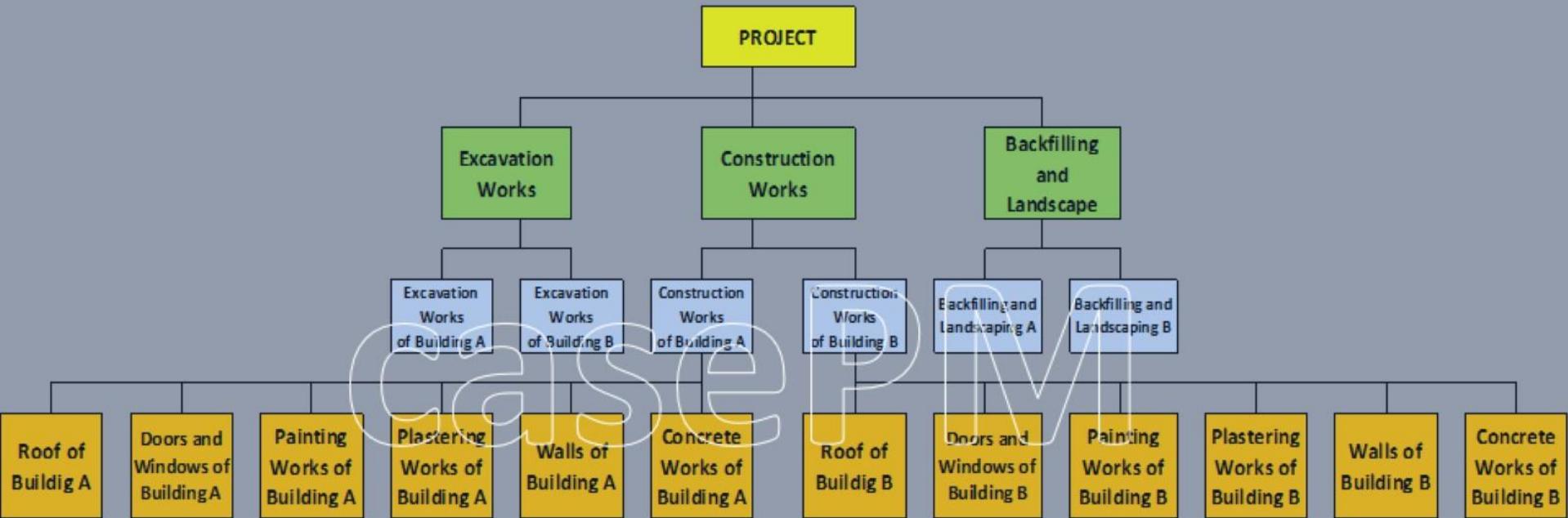
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Create WBS

What is the WBS?



Work Breakdown Structure



SCOPE MANAGEMENT

Create WBS

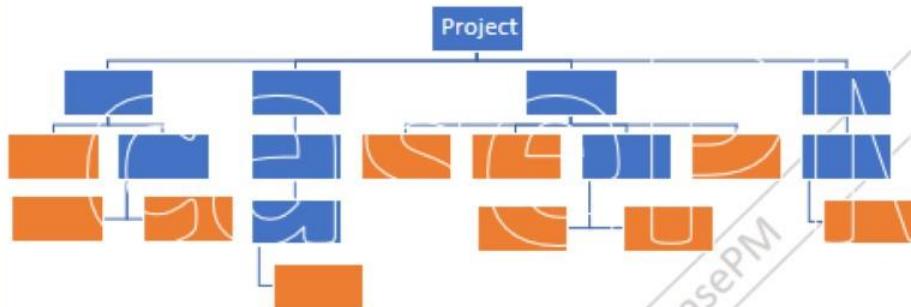
We decompose the work until we get the work packages which:

- We can finish the work fast and easily
- We can subcontract the work easily
- We can make the realistic cost, schedule and scope estimations easily

SCOPE MANAGEMENT

Create WBS

Work Breakdown Structure

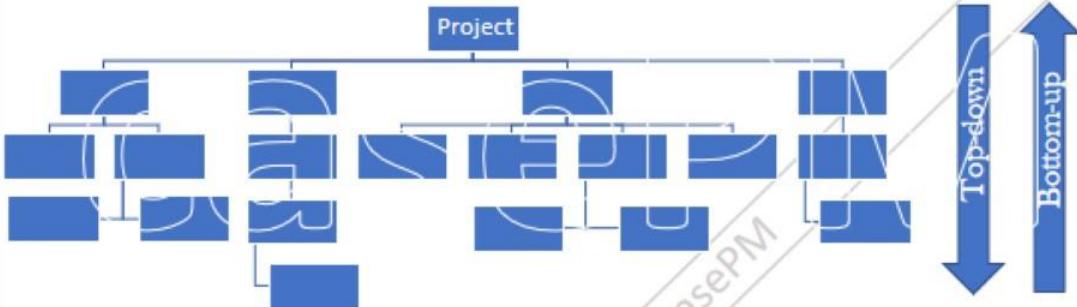


- Project is decomposed/deconstructed into smaller manageable pieces.
- First level is generally similar to the project life cycle.
- Project is decomposed until we get the easily manageable work packages.
- A work package consists of activities.

SCOPE MANAGEMENT

Create WBS

Work Breakdown Structure

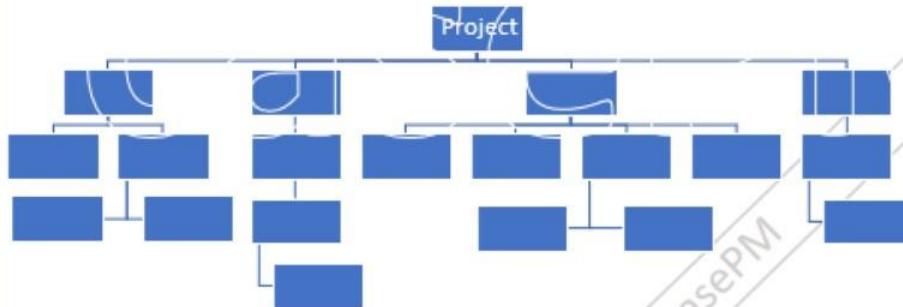


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SCOPE MANAGEMENT

Create WBS

Work Breakdown Structure

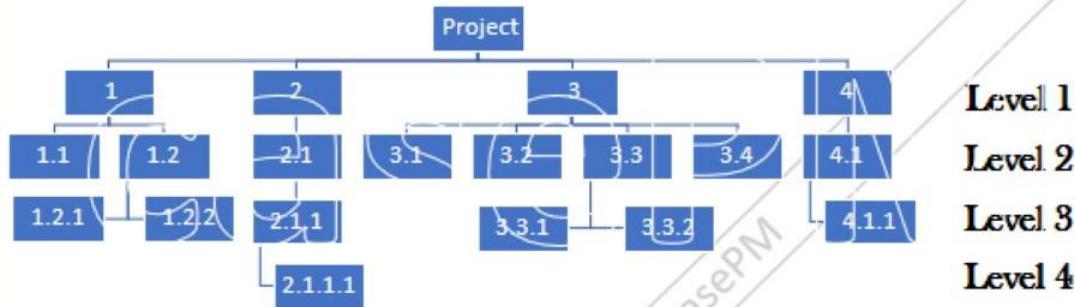


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SCOPE MANAGEMENT

Create WBS

Work Breakdown Structure

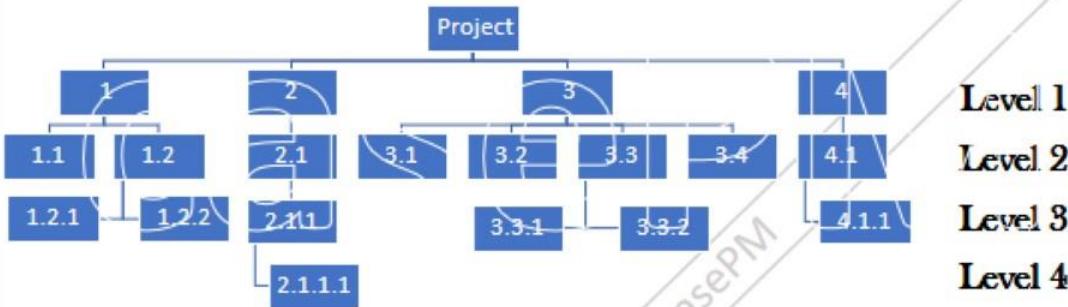


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SCOPE MANAGEMENT

Create WBS

Work Breakdown Structure

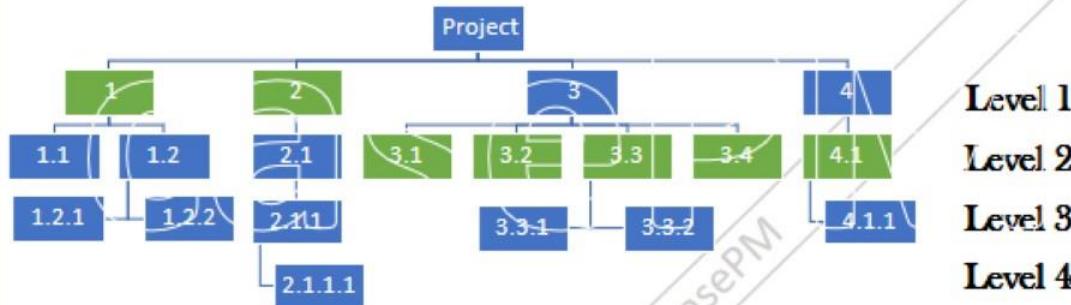


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SCOPE MANAGEMENT

Create WBS

Work Breakdown Structure



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- WBS numbering system is helpful for finding the location of a work package in the WBS
- Some works may need to be decomposed to further levels
- Control accounts provide high-level control of the Schedule, Cost and the Scope

Create WBS

Work Breakdown Structure

Project Manager creates the WBS with the help of the Project Team and other Stakeholders

- Project is decomposed/deconstructed into smaller manageable pieces.
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SCOPE MANAGEMENT

Create WBS

Advantages of creating Work Breakdown Structure

- Provides communication between stakeholders
- Provides better understanding of Works
- Need for the resources, cost and duration is checked
- Provides high-quality work
- Provide stakeholders to see the big Picture
- Provides facilitation
- Helps to determine the risks
- Decreases the number of changes
- The project will be managed easily

SCOPE MANAGEMENT

Create WBS

Where do we use the Work Breakdown Structure?

- Determining and Sequencing the Activities
- Creating the Network Diagram
- Determining the Resources
- Preparing and controlling the Schedule
- Preparing and controlling the Budget
- Identifying and managing the Risks
- Managing Quality
- Conducting Procurements
- Evaluating the Change Requests
- Preventing the Scope Creep
- Providing Communications

SCOPE MANAGEMENT

Create WBS // WBS Dictionary

SCOPE MANAGEMENT

Create WBS // WBS Dictionary

Why do we need WBS Dictionary?

- To prevent the Scope Creep

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SCOPE MANAGEMENT

Create WBS // WBS Dictionary

Project Name: Last Updated:
Work Package Name / ID: Approved By:
Control Account:
Responsible Name: Approval Date:

WBS DICTIONARY	
Description of the Work Package:	
Included Work:	
Criteria for Approval:	
Constraints and Assumptions:	
Budget:	
Assigned Resources:	
Technical Sources:	
Quality Metrics:	
Risks:	
Start Date / Duration / Due Date:	
Milestones:	
Predecessors / Successors:	

SCOPE MANAGEMENT

Create WBS // WBS Dictionary

WBS Dictionary

- ➔ Creating the WBS Dictionary is iterative!
- ➔ WBS Dictionary can also be helpful for authorizing the works (as part of the Work Authorization System)

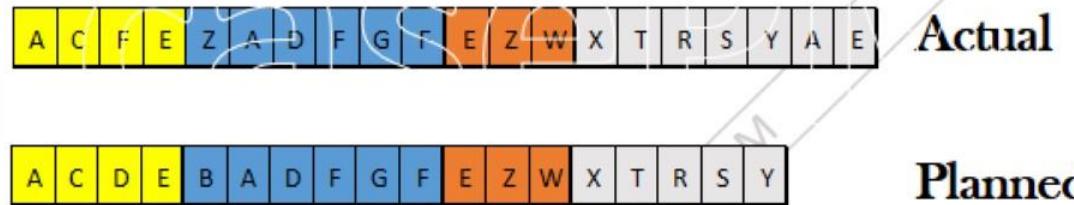
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SCOPE MANAGEMENT

Create WBS // Scope Baseline

SCOPE MANAGEMENT

Create WBS // Scope Baseline



WBS & WBS Dictionary
Project Scope Statement

Scope Baseline

- Only and exactly the work defined in the Scope Baseline should be done
- If we need to make a change in the scope, then this change has to follow the change control processes and it needs to be approved.

Create WBS Process

What Do We Need? What Do We Use? What Do We Get?

SCOPE MANAGEMENT

Create WBS

What do we get?

- Work Breakdown Structure (WBS)
- WBS Dictionary
- Revisions in:
 - Requirements Documentation
 - Assumption Log

Scope
Baseline

What do we need?

- Scope Management Plan → Project Management Plan
- Project Scope Statement
- Requirements Documentation
- Enterprise Environmental Factors
- Organizational Process Assets

Project
Documents

What do we use?

- Decomposition
- Expert Judgment

Create WBS Process

Important Notes

SCOPE MANAGEMENT

Create WBS

Important Notes

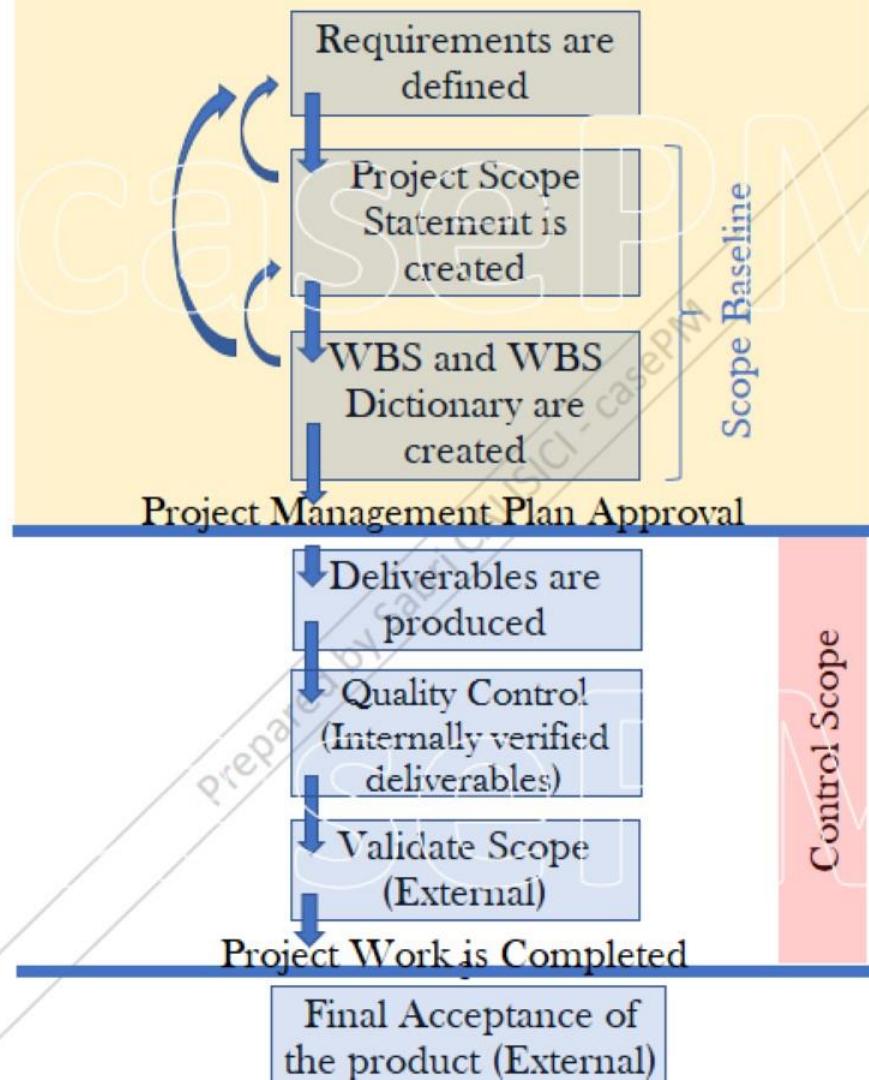
- All of the Projects should have a WBS
- WBS creating efforts have also positive effects on the project.
- Project Manager creates the WBS with the help of project team and other stakeholders.
- **All of the deliverables** of the Project are defined in the WBS.
- A WBS of a project can be modified to use for another similar Project.
- Dependencies of the activities, tasks or the work packages are NOT shown in the WBS.

SCOPE MANAGEMENT

Validate Scope // The Big Picture of the Scope Management

SCOPE MANAGEMENT

Validate Scope

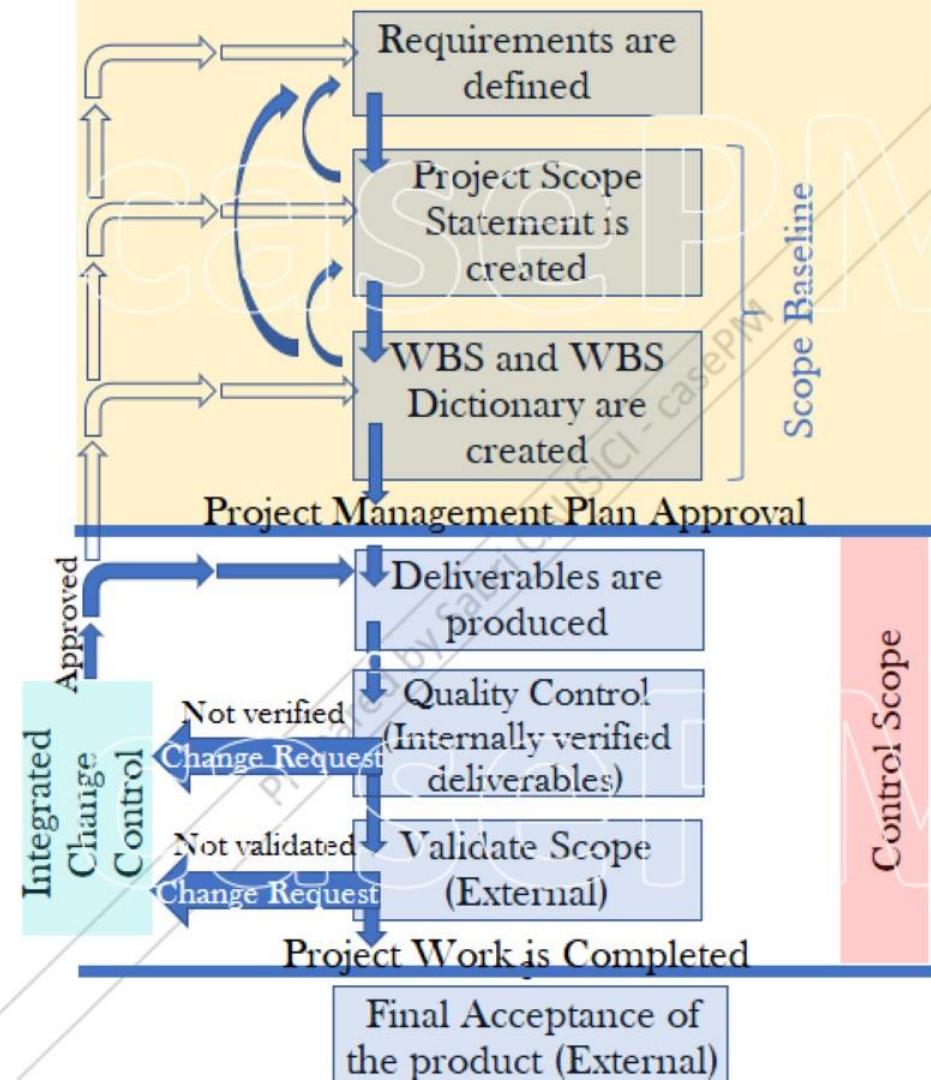


SCOPE MANAGEMENT

Validate Scope

SCOPE MANAGEMENT

Validate Scope



SCOPE MANAGEMENT

Validate Scope

Validate Scope

- **Purpose:** Getting the **interim validation** of the deliverables of the Project from the customer or the Sponsor.
- Planned meetings are held to get the **formal validation**
- Quality Control procedures should be performed before sending the deliverable for validation
- The deliverables which are passed through the internal Quality Control processes are called the **Verified Deliverables**
- If the deliverable cannot pass the Quality Control review, change request is created.
- If the deliverable is not verified by the customer (or Sponsor), change request is created.
- Work Performance Information is produced

Validate Scope Process

What Do We Need? What Do We Use? What Do We Get?

SCOPE MANAGEMENT

Validate Scope

What do we get?

- Accepted Deliverables
- Change Requests
- Work Performance Information
- Revisions in:
 - Requirements Documentation
 - Requirements Traceability Matrix
 - Lessons Learned Register

Project Documents

What do we need?

- Scope Management Plan
- Requirements Management Plan
- Scope Baseline
- Requirements Documentation
- Requirements Traceability Matrix
- Quality Reports
- Lessons Learned Register
- Verified Deliverables
- Work Performance Data

Project Management Plan

Project Documents

SCOPE MANAGEMENT

Validate Scope

What do we use?

- Inspection
- Decision Making Analysis (Voting)

Prepared by Sabri CALISICI - casePM

SCOPE MANAGEMENT

Control Scope

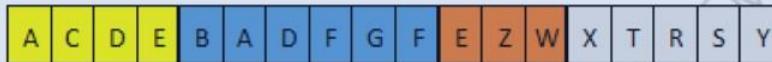
SCOPE MANAGEMENT

Control Scope

Control Scope



vs



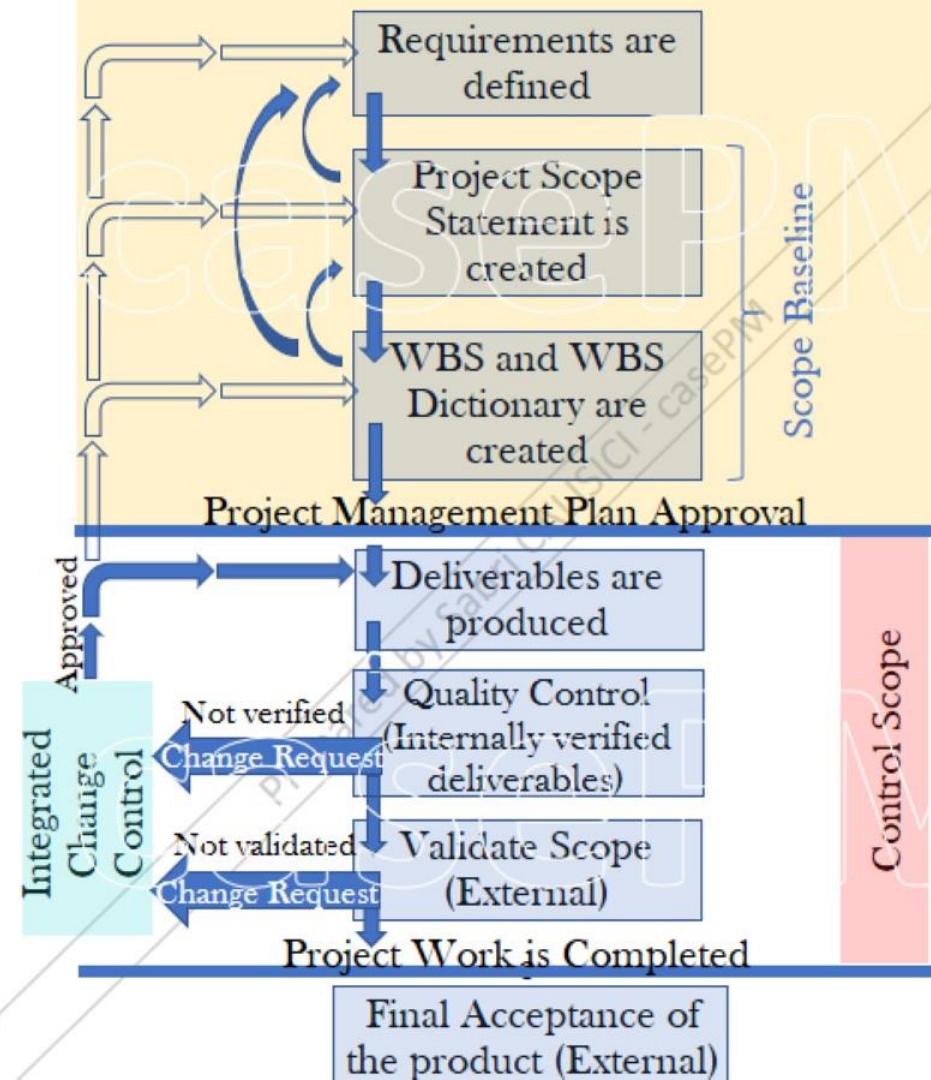
Actual

Scope
Baseline

- The Scope Baseline has to be realistic.
- The project work must have been started.
- Controlling the scope may cause changes in the Project Management Plan and the Project Documents.
- Unnecessary changes are prevented.
- The Project Manager is responsible for controlling the scope.

SCOPE MANAGEMENT

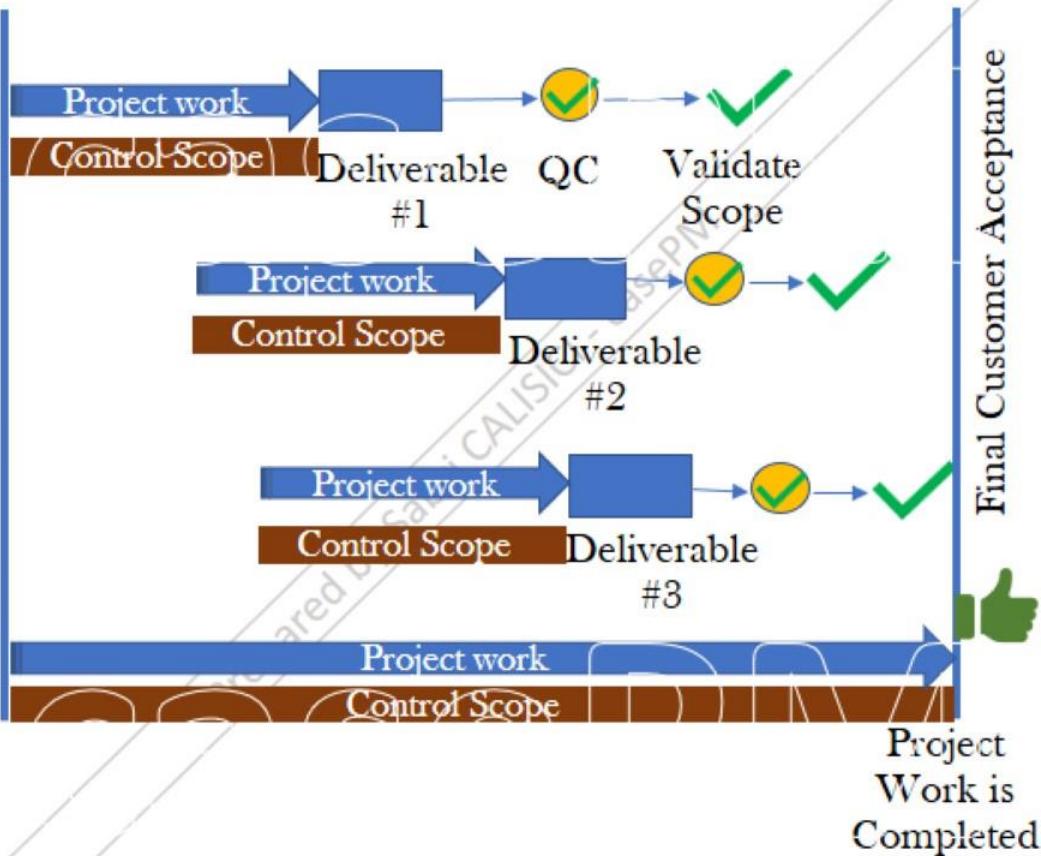
Control Scope



SCOPE MANAGEMENT

Control Scope

Approval of the Project Management Plan



Control Scope Process

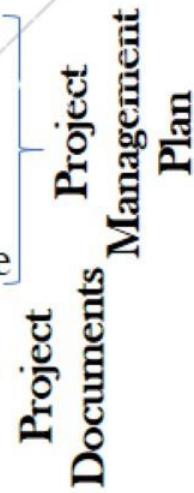
What Do We Need? What Do We Use? What Do We Get?

SCOPE MANAGEMENT

Control Scope

What do we get?

- Work Performance Information
- Change Requests
- Updates on the:
 - Scope Management Plan
 - Scope Baseline
 - Schedule Baseline
 - Cost Baseline
 - Performance Measurement Baseline
 - Lessons Learned Register
 - Requirements Documentation
 - Requirements Traceability Matrix



Prepared by Suresh - casePM

SCOPE MANAGEMENT

Control Scope

What do we need?

- Scope Management Plan
- Requirements Management Plan
- Change Management Plan
- Configuration Management Plan
- Scope Baseline
- Performance Measurement Baseline
- Lessons Learned Register
- Requirements Documentation
- Requirements Traceability Matrix
- Work Performance Data
- Organizational Process Assets

What do we use?

- Data Analysis (Variance Analysis, Trend Analysis)

Project Management Plan

Project Documents

SCOPE MANAGEMENT

Agile Considerations

SCOPE MANAGEMENT

Agile Considerations

Predictive

All of the requirements are defined clearly.

Scope is completely defined at the beginning.

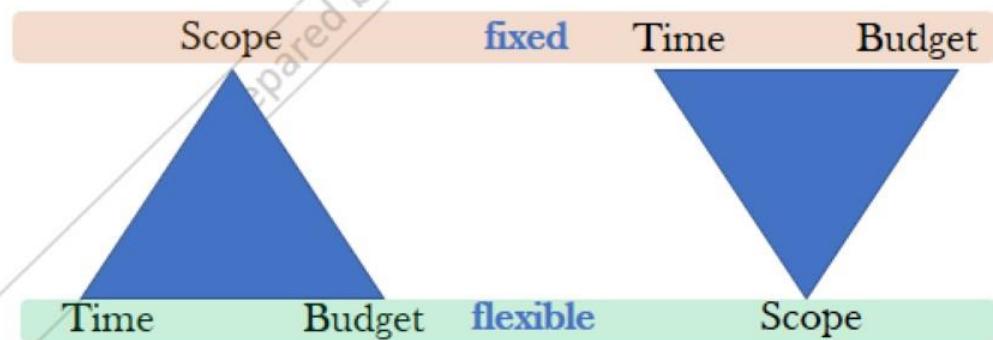
Changes in the Scope are not desired.

Agile

Some of the requirements are defined and prioritized at the beginning.

Scope is partially defined at the beginning, then new scope content becomes visible during iterations.

The Scope is developed by changes.



SCOPE MANAGEMENT

Tailoring Scope Management

SCOPE MANAGEMENT

Tailoring Scope Management

Tailoring Considerations

- ➔ We need to select the processes, and tools and techniques which are appropriate to our Project
- Existing knowledge and requirements management systems should be considered
- We need to check the guidelines, policies and procedures related to validation and control processes
- The development approach of the organization should be considered (i.e. predictive, agile, hybrid, etc.)
- The organizational governance should be considered
- We need to consider the number of unstable requirements