Plan Scope Management

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1. Introduction

This Plan Scope Management document defines the systematic approach for planning, defining, validating, and controlling the scope of the ADPA (Advanced Document Processing & Automation Framework) project. The

ADPA project aims to deliver a modular, standards-compliant, and AI-powered automation framework for enterprise-grade document generation, project management, and business analysis, supporting industry best practices such as BABOK v3, PMBOK 7th Edition, and DMBOK 2.0.

This document ensures scope alignment with enterprise standards, regulatory compliance, and integration requirements for Fortune 500-scale organizations.

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2. Scope Management Approach

Methodology

- **Requirements-Driven Scope Definition:**
  All scope elements are defined based on detailed requirements elicited from key enterprise stakeholders, leveraging interviews, workshops, and standards analysis (BABOK, PMBOK, DMBOK).
- **Iterative Scope Refinement:**
  Agile and incremental refinement cycles allow adaptation to evolving business needs and technology advancements, especially as AI provider capabilities and compliance requirements change.
- **Stakeholder-Centric Validation:**
  Continuous engagement with business analysts, project managers, IT, and compliance teams ensures the scope addresses documented requirements and regulatory mandates.
- **Change-Controlled Scope Management:**
  All changes to scope are managed through a formal change control process, ensuring traceability, impact analysis, and governance.

Key Principles

- **Clear Scope Boundaries:**
  Only features, integrations, and deliverables explicitly documented and approved are in-scope—examples include standards-compliant

document generation, multi-provider AI orchestration, and integration with Confluence, SharePoint, and Adobe Document Services.

- **Stakeholder Alignment:**
  Regular checkpoints with internal and external stakeholders (IT, compliance, project sponsors) ensure ongoing alignment and early identification of gaps or ambiguities.
- **Documented Acceptance Criteria:**
  Each scope item is accompanied by clear, measurable acceptance criteria based on industry standards and enterprise requirements.
- **Proactive Change Management:**
  Scope changes are anticipated and managed with impact assessments, prioritization, and formal stakeholder approval before implementation.

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3. Roles and Responsibilities

Role	Responsibilities
Project Manager	- Accountable for overall scope management - Approves all scope changes - Coordinates communications and change control with all teams
Business Analyst	- Leads requirements gathering and analysis - Authors and maintains scope documentation - Supports impact assessment and traceability
Enterprise Architect	- Ensures scope aligns with technical and compliance architecture - Reviews integration and security requirements

Role	Responsibilities
Technical Lead(s)	- Provides input on technical feasibility and constraints - Estimates and validates technical scope items
Stakeholders	- Define and review requirements - Validate and accept deliverables - Initiate and justify change requests
Compliance Officer	- Ensures regulatory requirements are correctly reflected in project scope - Reviews evidence for compliance

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4. Scope Definition Process

Requirements Gathering

ADPA's scope is grounded in enterprise automation and standards compliance. The following activities ensure robust requirements:

1. **Stakeholder Interviews:**
   Direct engagement with business analysts, project managers, IT, and compliance representatives to gather detailed needs for document automation, regulatory reporting, and system integration.
2. **Requirements Workshops:**
   Collaborative sessions to refine requirements for standards-compliant documentation (BABOK, PMBOK, DMBOK), AI provider selection, and workflow automation.
3. **Document Analysis:**
   Review of existing business processes, regulatory obligations, and prior documentation tools to identify gaps and opportunities for automation and integration.

4. **Prototyping Sessions:**
   Early demonstrations of CLI, API, and admin interface prototypes to validate requirements and inform scope boundaries.

Scope Documentation

All requirements and decisions are codified into clear and accessible documents:

- **Project Scope Statement:**
  Outlines in-scope features (e.g., AI-powered document generation, REST API, CLI tools, enterprise integrations), major deliverables, and explicit out-of-scope items (e.g., unsupported frameworks, deprecated integrations).
- **Work Breakdown Structure (WBS):**
  Deconstructs the project into modules/submodules—AI Processing, Document Generator, Integration Layer (Adobe, SharePoint, Confluence), API Server, CLI, Admin Interface, Analytics & Reporting.
- **Acceptance Criteria:**
  Defined for each deliverable, based on standards adherence (e.g., BABOK v3 compliance), functionality (multi-provider AI failover), and integration (successful SharePoint publishing, Adobe document output).
- **Assumptions & Constraints:**
  E.g., underlying platforms (Node.js 18+, TypeScript 5.7+), supported AI providers, licensing (MIT), enterprise security requirements, compliance standards, and phased delivery (see roadmap).

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5. Validation and Control

Validation Methods

- **Formal Deliverable Reviews:**
  Each major deliverable (API, CLI, document templates, integrations)

is reviewed against documented requirements and acceptance criteria.
- **Stakeholder Sign-Off:**
  Key stakeholders (business, IT, compliance) sign off on scope documents and final deliverables before production release.
- **Quality Gate Assessments:**
  Automated and manual checks (e.g., test suites, standards validation, security review) at predefined project milestones.

Control Procedures

- **Change Request Workflow:**
  All changes to the scope are submitted as formal change requests, logged, and reviewed by the project manager and relevant leads.
- **Impact Assessment Process:**
  Each change request is evaluated for its effect on project timelines, resource allocation, compliance risk, and downstream integrations.
- **Approval Authority Matrix:**
  Defines which roles can approve different types of changes (e.g., technical, compliance, feature expansion).
- **Configuration Management:**
  Version control (GitHub Enterprise), configuration files, and templates are managed to ensure traceability and reproducibility.

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6. ADPA Project-Specific Considerations

- **Standards-Driven Scope:**
  All documentation and automation features are mapped to industry standards (BABOK v3, PMBOK 7th, DMBOK 2.0) and updated as these standards evolve.
- **Multi-Provider AI Integration:**
  Scope includes support and failover for multiple AI providers (OpenAI, Google AI, GitHub Copilot, Ollama) with dynamic configuration and provider selection.

- **Enterprise Compliance:**
  Scope incorporates requirements for GDPR, SOX, PCI DSS, Basel III, and other relevant regulations, impacting documentation, security, and auditability.
- **Extensible Integration Layer:**
  Scope covers integration with Atlassian Confluence, Microsoft SharePoint, Adobe Document Services, and version control systems (GitHub, GitLab, Azure DevOps).
- **Scalability & Security:**
  Microservices-based architecture, authentication/authorization, and horizontal scaling are core scope components designed for Fortune 500 readiness.
- **Roadmap-Driven Expansion:**
  Scope is phased, with DMBOK 2.0 and advanced analytics planned for future releases (see project roadmap for timing).

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7. Practical Guidance for Scope Management

- Maintain clear, accessible documentation and update scope artifacts with every approved change.
- Engage stakeholders early and often to validate scope and avoid late-stage surprises.
- Use automated test suites and validation scripts to enforce acceptance criteria and prevent scope creep.
- Leverage the admin web interface and reporting features to provide transparency on scope status and changes.
- Regularly review regulatory requirements as part of scope control, especially for enterprise and compliance-driven clients.

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