How to Create a Project Scoping Document

WHAT IS A SCOPING DOCUMENT AND HOW DOES IT HELP YOU?

The project scoping document is a living document that you will iterate along your project. It helps you to understand and narrow the scope of your project, to assess the need for scope changes, risk management, and also allows for communication.

By creating this document you will clarify stakeholders and partners, you will be able to set clear goals to the team, and you will be able to report the progress on deliverables.

LETS FOCUS ON CREATING A PROJECT SCOPING DOCUMENT:

If you follow the template proposed, you should create the following elements:

- **Overall goal.** Define who you are designing your solution for, what business need is your project addressing, and more importantly: what is your unique value proposition.
  You can see this part as a sort of marketing pitch of your project.
  This might change as you iterate with your sponsor or team.

- **Project scope.** Describe what is in the scope of your project is this phase is all about – for example a proof of concept.

- **Stakeholders**. List the sponsors and stakeholders of the project

- **Project organization**. Describe the project team: who's the project lead, who are the other contributors and their main roles.

- **Project deliverables**
  List the outputs of your project. You can also include acceptance criteria: what are the conditions to accept the different deliverables. This should include design tasks such as finding out what your users needs ("User Research") or ("Wireframes").

- **Milestones**

  Describe a rough timeline of your project, with the main milestones or checkpoints and their dates.

EXAMPLE:

Project Scope Example

My Travel & Expense

OVERALL GOAL

For the frequent business travelers and managers who are dissatisfied with their current user experience, our solution is a mobile application hosted in the cloud and integrated with our Business Suite. It offers the ability for the travelers to book and experience his trip and to file its expense report easily, and the manager to plan and monitor his Travel and Expense Budget.

PROJECT SCOPE

Provide a travel and entertainment management solution supporting a fast adoption for frequent travelers and managers already using our Business Suite, covering:

- Budget
- Travel booking
- Travel experience
- Expense reports

PROJECT STAKEHOLDERS

- **Sponsor:** Paul Smith, Andre Green
- **Stakeholders:** Eva Mendosa

PROJECT ORGANIZATION

- **Lead:** Peter Tiers
- **Contributors:** Karim Taha, Sophia Zen, Andre Wolf

PROJECT DELIVERABLES

- Personas, Point of View (POV) Statements
- Storyboard
- Prototype
- Working software

MILESTONES

Milestone	Date
First Draft Review with Andre	3/27/2016
Executive Review (Paul, Andre, Eva)	4/1/2016
TechEd Las Vegas	4/5/2016
TechEd Europe	5/5/2016
RTC V1.	6/2/2016
Business Travel Show London	6/5/2016