

Gathering information to define scope

In this lesson, you are learning to define project scope status and differentiate in-scope, out-of-scope, and scope creep factors that affect reaching the project goal. Let’s focus here on how to identify vital elements of a project’s scope and examine the right questions to ask in order to define it.

Asking scope-defining questions

Imagine that while working in a restaurant management group, your manager calls and asks you to “update the dining space,” then quickly hangs up the phone without providing further instruction. In this initial handoff from the manager, you are missing a lot of information. How do you even know what to ask?

Let’s quickly recap the concept of scope. The scope provides the boundaries for your project. You define the scope to help identify necessary resources, resource costs, and a schedule for the project.

In the situation we just described, here are some questions you might ask your manager in order to get the information you need to define the scope of the project:

Stakeholders

How did you arrive at the decision to update the dining space?

Did the request originate from the restaurant owner, customers, or other stakeholders?

Who will approve the scope for the project?

Goals

What is the reason for updating the dining space?

What isn't working in the current dining space?

What is the end goal of this project?

Deliverables

Which dining space is being updated?

What exactly needs to be updated?

Does the dining space need a remodel?

Resources

What materials, equipment, and people will be needed?

Will we need to hire contractors?

Will we need to attain a floor plan and building permits?

Budget

What is the budget for this project? Is it fixed or flexible?

Schedule

How much time do we have to complete the project?

When does the project need to be completed?

Flexibility

How much flexibility is there?

What is the highest priority: hitting the deadline, sticking to the budget, or making sure the result meets all the quality targets?

Key takeaway

Taking the time to ask questions and ensure that you understand the scope of the project will help reduce expenses, rework, frustration, and confusion. Make sure you understand the *who*, *what*, *when*, *where*, *why*, and *how* as it applies to the scope. If you are missing any of that information, focus your questions on those elements. The initiation phase of the project sets the foundation for the project, so ensuring that you understand the scope and expectations during this stage is essential.

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