Managing Project Expectations:

How to define and organize project scope

1

Abstract

Project scope: the intended result of a project, and what's required to bring it to completion.

Projects range in size, complexity, duration, resources, stakeholders - and that's just the tip of the iceberg.

Defining the scope of a given project - what the intended result is, and what's required to bring it to completion - is not only important, it's necessary.

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It creates clarity and accountability, and carves out the path for success. Establishing project scope can prove to be difficult. It requires you to step back and have a global understanding of the project environment and to be analytical.

You have to get intimate with the specific details. There are plenty of elements to take into   account in order to scope the main lines of a program or project.
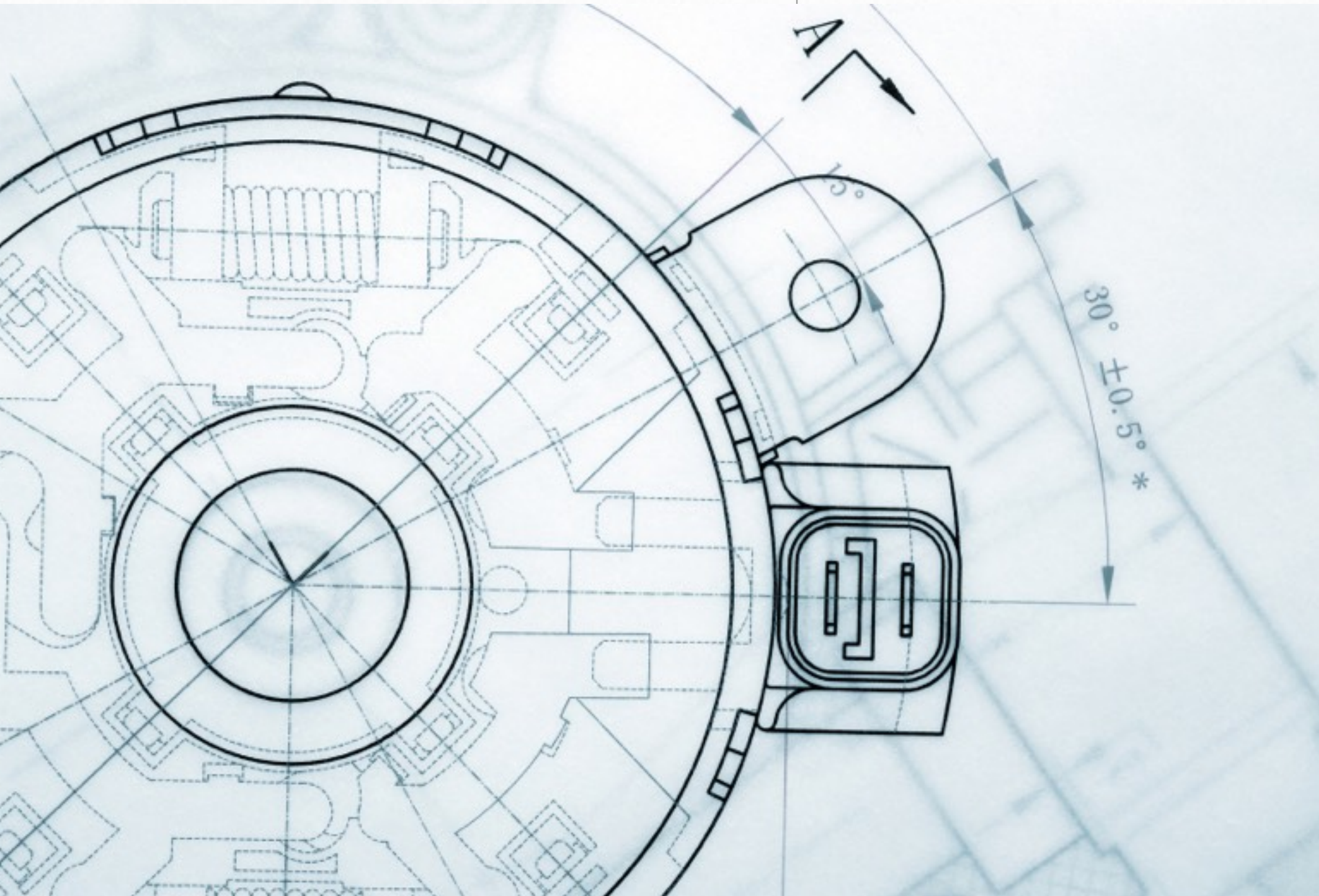
This white paper examines how to define the scope of a project and consequently, how to organize the information in a comprehensive way that can be referred to by all stakeholders, at any time.

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How essential is a project scope?

Identify how the project is linked to the company's overall strategy.

Companies and teams don't always take the time to define the scope of a project, because it's often seen as a waste of time; and people usually want to go straight to planning.

Nevertheless, the time before project initiation is very important for maximizing success.

Projects often see failure for many reasons; one of the main ones being unfounded expectations, due to a lack of understanding of the intended goal of the project. It can also be due to a lack of knowledge and organizational skills, which make deadlines difficult to adhere to.

Taking the time to develop a project scope should be seen as an investment, not as a loss. The greater the preparation, the greater the chances of success.

3

Determining the what, the objective

Refer to all project documentation to get clear on the intended outcome.

Once a project is defined as one, the next step is to gain clarity on exactly why the project is being initiated - and what its ultimate purpose is.

In other words, what is the intended outcome? The why is the motivation.

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At this stage, we're not talking about the "how", we're talking about the "what". In order to determine all the parts of the what, we suggest using the SMART method: Specific, Measurable, Acceptable, Relevant, Time-bound.

To dig deeper into the what and why, identify how the project is linked to the company's overall strategy. This will help you get an understanding for the importance of the project, the context and the desired outcomes. It's also a good idea to make an exhaustive list of all the stakeholders - knowing who's involved is a major help to gaining a clearer picture of what the outcome should be.

To get the full view of the intended goal or outcome, you'll want to refer to all the original documentation, such as the initial project proposal. The information here will usually point to all the answers you're looking for about why the project was initiated and what the end result should explicitly look like - or what functionalities it should provide.

Based on all the learnings, a project scope statement is put together to summarize what the project intends to produce (product, service, specific result), its complexity and size. This documentation serves a major purpose when your team is in the thick of the project, because it can be referred to for clarification and for keeping people in alignment with the desired outcome.

A little note of caution; it's unlikely that you'll be able to create a project scope without making some assumptions - and that's ok. Because waiting until every last detail is figured out, likely means that you'll be waiting until the project is over. Create a document with all the assumptions and adjust it as you get clearer on the details.

But, it's not only your assumptions that will change - the scope is bound to change too. Some details, complications, etc., are simply unforeseeable from the get go. So it's also a good idea to build in a contingency for the unknown.

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First comes scope, then comes budget and time

Cost and time constraints are directly tied to the project scope

Once the scope is defined, you can start making calculations for how much the project will cost, and how much time it will take to complete it.

Cost and time constraints are directly tied to the project scope.

So as you can see, getting the scope as accurate as possible, makes your calculations more accurate as well.

In terms of getting concrete data for time and schedule constraints, determine if there's an event date, launch date or business cycle for which the results of the project are needed.

Based on any constraints that you discover, certain pieces of the project will have to be shifted in priority, in order to deliver on time and on budget.

To get even more information on budget, time and workload needs, talk to your stakeholders. You'll need to establish a schedule with all the relevant information.

For example, an IT project can only be planned if you know how much   time the developer requires to implement the concept. And the easiest way to get this information is to ask the developer. The tasks then need to be organized into a schedule, along with the subsequent costs.

5

Organizing Project Scope

A Work Breakdown Structure creates a hierarchy of project deliverables

The "how", is about finding the right method for the project. This method will help you achieve it in a logical and organized way.

One of the simplest ways to organize and capture the scope of a project is with a Work Breakdown Structure (WBS).

This creates structure around the scope of a project by creating a hierarchy of the deliverables, and a breakdown of the tasks required to complete them. In the simplest terms, it breaks up all the activities that need to be performed, down to the smallest actions.

With Genius Project, you can take the WBS a little further and put into the software's Gantt chart, Genius Planner, for a holistic view of interdependencies, re-source requirements and duration period for each deliverable. As soon as your request becomes a project, the Gantt chart becomes an invaluable tool for planning resources, costs and deadlines.

The software allows users to create project requests, which can include a description and attachments. There' s also a section for project ranking, with up to 10 fields that the user can fill out. This information aims at informing the management level. The ranking can be set up with budget constraints, or risks, for example. Genius Project calculates the ranking from 1 to 100 automatically, in order for management to evaluate the priority of the project. The requests can be set up with workflows in order to get approval from different departments.

The project request can move through several stages of approval in order to ensure its feasibility.

If we use the automotive industry as an example, it could look something like this: The government has built roads using new materials, and therefore, tire companies need to adapt their products. The initiative to change the tires, needs to be validated and approved within the company.

In the basic system, each user can put in a request. The Marketing department can validate that there's a market for the new tires, the Technical Department can confirm that the innovation is possible and the Finance Department can approve the budget.

When the project is approved, Genius Project will change the request into a project. All the information is copied into the project document, which offers more detailed information related to costs, re-sources, etc. At this time, the Project Manager can start planning the tasks, the processes and the timeframe, and all this information can be used to create the project scope statement.

There's a lot to consider when putting together a project scope. The key is to look at all the information, to get informed by speaking with stakeholders and to build in a contingency for any changes and/or assumptions that need to be made.

Once this information is organized into a project scope statement and work breakdown structure, ensure that both documents are readily available to team members to refer to throughout execution of the project.

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