

SCOPE PLAN CHECKLIST

This checklist ensures that you create an effective well defined and presented scope plan. Once you have created this document you have your project's working framework. To accomplish this you need to work through the following activities:

- Collect requirements.
- Define the scope.
- Produce a work breakdown structure (WBS).
- Verify & Control scope.

An important function of this particular plan is that of defining how your project scope will be managed and controlled as the project progresses.

COLLECT REQUIREMENTS

This section of the plan is concerned with ensuring that you have a precise understanding of and a clear definition of your customers' needs and expectations of the project. To achieve this you will need to study the project charter and stakeholder register to gather the information you need.

By working with your project stakeholders you will be able to obtain the detailed information you require for this plan and its associated documents. There is a wide variety of techniques and tools you can use to gather this information some of the most popular are surveys, questionnaires, interviews, brainstorming, prototypes, observations and facilitated workshops.

Depending on the nature and importance of your project you may wish to adopt different levels of agreement on decisions. For example you may require total agreement within the group or you may be happy to accept a majority (over 50%).

It is only once you fully appreciate your project requirements will you have the foundation for your WBS and therefore be able to properly plan your projects costs, schedule and quality criteria. As well as how you will plan, prioritize, track and report these requirements.

DEFINITION OF THE SCOPE

Using the requirements documents and the data contained in the project charter you will be able to define your project's scope and produce the 'project scope statement'.

Your definition will describe in detail exactly what the project is and its deliverables, as well as outline the approach you took to arrive at this point. This statement will also clarify what is excluded from the scope, as well as define the acceptance criteria, which denotes the project's completion. These aspects enable the expectations of the project stakeholders to be set accurately and appropriately.

Once the project scope statement has been produced then you will be able to focus on the detailed aspects of your planning. Another essential aspect of any project is the need to communicate the assumptions that have been made in the process of writing the scope, as well as detailing any constraints that may prevent certain approaches being considered as viable options for the project.

Knowing that it is impossible to plan, or anticipate, everything connected to a project a major part of this statement must qualify how you will handle requests for 'changes'. These changes can be simple additional aspects of work, modifications to a specific element of the project, or complete changes to what was originally planned.

Your project scope statement also defines non-functional requirements such as the project teams roles and responsibilities, allocating a specified individual per role. The level and format of the project documentation, including any management reports will also be described in the statement along with which individuals should receive such documents.

WORK BREAKDOWN STRUCTURE (WBS)

The requirements documentation deals with project aspects at a higher-level and to become a workable project these details need to be broken down into manageable portions of work. It is this process of dissecting the requirements into smaller and practical components that creates your work breakdown structure, known as a WBS.

Many industries have their own standards and processes that they follow to create a WBS and this process is known as 'decomposition'. This subdivision is complete once you have reached the work package level and allocated it a unique Id. This is where you are able to estimate cost and the activity duration with a reliable accuracy. You must be conscious in this process to not divide tasks to the point where they are unmanageable.

A natural consequence of this activity is the creation of the WBS dictionary and the scope baseline. Your project WBS is usually presented in a graphical form, such as an organizational style chart or a fishbone diagram.

At this stage in the process you now have your 'Scope Baseline', which consists of your project scope statement, WBS and WBS dictionary.

VERIFY & CONTROL SCOPE

Now that you have all your requirements, assumptions, constraints and exclusions documented you need to gain the formal acceptance of the project deliverables by the stakeholders and is referred to as 'verify scope'.

Each deliverable has been validated as part of the quality control process and along with the project management plan and the requirements documentation are all that you need to conduct your scope verification.

Once this activity has been completed you then have signed agreement from the appropriate stakeholder for all your 'accepted deliverables'. Any change or alteration that occurs after this sign off of the scope must adhere to your project's integrated change control procedure.

As your project progresses it is natural that you will be asked to make changes to the scope baseline. These can result from a variety of reasons, but the key aspect is that any changes that become incorporated in the project scope must be formally accepted into the scope baseline.

It is necessary to have strict controls over such changes so that you don't introduce unacceptable or unqualified risks into your project and incur 'scope creep'. An essential product of any project is the work performance information that keeps all interested parties informed and up-to-date on the projects progression. This typically shows each deliverable in relation to its:

- Current status – future / current / WIP / completed.
- Timely nature – ahead / on-time/ behind.
- Cost component – over / balanced / under budget or forecast.

This work performance data along with the project management plan and the requirements documentation are the three things that you must have to control over your projects scope.

Once a change has been accepted and signed-off as part of the integrated control process you may need to update the scope baseline and any other project baseline accordingly and issue a new version of the project management plan.

It is only at the closing project phase that a stakeholder will formally acceptance sign off your project.