6 Project Scope Management

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Learning objectives

By the time you have completed this chapter you should be able to:

☐ Define the project scope

☐ Understand the importance of defining the project scope

☐ Prepare a detailed scope statement

☐ Outline the contents of a project charter

☐ Break down a project into deliverable, sub deliverables and work packages

☐ Create a product break down structure

☐ Create a responsibility assignment matrix

☐ Develop a project communication plan

6.1 Introduction

Project scope management involves describing the product, service or result of the project, and identifying the activities that need to be achieved in order to deliver the expected final outcome. Far too often an initial project brief is given to a project manager with little guidance as to what the project includes or the extent of the work required to deliver the business objectives. This should be of little surprise. After all, the primary concern of the client is to recoup the benefits from commissioning a project or exploiting an opportunity through a project.

The process of defining the project, in terms of deliverables, objectives, requirements and detail, becomes the responsibility of the project manager.

This chapter guides the processes of developing and defining the project scope. This involves assessing the project objectives, identifying main deliverables and subdividing these into structures that enable the project manager to generate responsibilities, cost estimates, control points, work packages and a basis for detail planning.

6.2   Defining the project scope

The project scope is everything about the project. This includes the final deliverable of the project and all the work that must be done in order to achieve the deliverable. Defining the project scope involves identifying *what is* and *what is not* included in the project. This provides the point of reference against which the project is authorised, measured and controlled.

Project scope is defined to be "the sum of products and services to be provided as a project" (PMI, 2013). The scope of project must be written down in the Scope Document. The level of details should be sufficient to define to all stakeholders just exactly what the project is about. The scope is different from the objectives. Objectives set out the actual deliverables of the project in some details. The scope, on the other hand, defines just what aspects of the project are the responsibility of the project team and are covered by the budget and the timescale.

A very common example of poor scope is maintenance. Often a project ends with successful delivery of the stated objectives but no-one has thought about maintenance. There is no budget or resources to cover maintenance because they were all used up in delivering the objectives. Consequently, it is vital before the project starts to specify the scope exactly, to eradicate or resolve any unreasonable expectation as to what aspects of the project the team are expected to deliver.

The best way to specify the scope is to specify: What **IS** included in the scope, followed by what is **NOT** included in the scope. This would eliminate a possible scope issue arising from unreasonable expectations in discussion with stakeholders.

It is the project manager's responsibility to define the project scope, normally conducted under the guidance of the project sponsor and following consultation with the key stakeholders as described in Chapter 2. It is accepted that all stakeholders may not be in full agreement of the project objectives, but a clear definition of the scope will establish a common understanding of the agreed

project outcome. It is critical that the boundaries of the project are defined at the early stages of the project, as there is a tendency to add deliverables to the project during the planning and execution stage. The project scope therefore becomes the baseline against which the work content required to create the project deliverables are planned and measured. Without a clear definition of the project scope, it would be impossible to estimate durations, calculate costs, and determine resources and establish when the project is officially complete. Finally, the scope document should be written in such a way as to best communicate the intension of the project to all of the stakeholders.

■   The project charter

Sometimes referred to as a *project initiation document* (PID) (OGC, 2005), the project charter is the document that formally authorises the project. Drawing on the defined project scope, the project charter is created, issued and sanctioned by senior management.

As the main purpose of the charter is to formally recognise the existence of a new project within the organisation, it is normally a short document that only outlines the broad objectives of the project. It also identifies the main stakeholders and authorises the project manager to officially acquire the resources required to achieve the project objectives. Once authorised the project becomes part of the ongoing work within the organisation. Identity codes are created, budgets are allocated, resources are assigned and performance measures are established.

As the project charter is a high level document, its primary concern is to document the business needs and justify the investment for the project. It should demonstrate an understanding of the customer requirements and show how the end deliverable of the project intends to satisfy those requirements. Typical contents of the project charter would therefore include:

- The project title
- The project's mission and brief
- The project focus
- The critical success factors (CFSs)
- The project risks
- Project authorisation
- The assigned project manager
- The project team management structure
- The project approach
- The project quality plan