2-6-2010

Effective Project Management: the Art of Creating Scope Statements

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As I stated in my last article, Project Management - A Law Librarian Survival Skill (http://www.llrx.com /features/projectmanagement.htm) , the first step, and perhaps the most intimidating step, in managing a successful project is to accurately define the scope of the project. The scope statement should include the project's justifications and objectives. It should also describe the project's deliverables and include a budget. The scope statement is the definitive document or road map that should be consulted any time there are questions or controversies about the project. Consequently, the scope statement is a powerful document that is integral to the success of the project.

As is the rule with all written documentation, the scope statement should be clearly and concisely written. Avoid ambiguities at all costs. If a scope statement is too vague, it can be open to interpretation which can lead to trouble in the future. It is important to use language that everyone can understand. Don't use jargon or technical terms.

If you'd like to view sample scope statements or locate scope statement templates, I suggest using Google's Advanced Search feature. Search for terms such as: scope statement or project management forms. Limit your search to the .edu domain. I have found that IT departments from educational institutions have many templates and scope statements freely available. Project management templates are heavily used by IT departments at colleges and universities so you can be assured that they work well and have been thoroughly vetted.

Let's begin the process of writing the scope statement.

1. Understand the project.

In order to properly create a scope statement, you must meet with the project stakeholders and be certain that you understand the objectives of the project. Not only do you need to understand the requirements of the project, you need to know why the project is being undertaken. What are the drivers or reasons for undertaking the project?

2. Title the project.

After gathering preliminary data, it is time to name the project. The title of the project should be descriptive, yet clear and concise. Use action words and avoid passive verb tenses. The project name should clear enough that all participants will know what the project does yet clever enough to be memorable.

3. Justify the project.

Why is this project being undertaken? What value will be added once the project is complete? Describe why the problem is worth solving and how it fits into the organization's strategic plans. All

projects should be aligned to support the strategic goals of an organization.

4. Describe the objectives and deliverables of the project.

List the requirements or objectives of the project. What does the project intend to accomplish? What is being promised to the client? This section should include milestones or major steps in the project. It should also include deliverables. In other words, what will be delivered...a report, a software program, a recommendation? It is particularly essential that deliverables be measurable. In other words, don't include a nebulous objective. Be certain that the outcome can be measurable by framing the statement quantitatively.

5. Define what is out of scope.

Many projects fail due to scope creep. Scope creep occurs when additional tasks or features are added to the project without changing the time line or budget for the project. Consequently the project is not completed by deadline or exceeds its budget. One method for heading off scope creep is to define what is out of scope in your scope statement. Including a list of non-deliverables up front ensures that the stakeholders maintain a realistic expectation of the project's outcomes.

6. Estimate the time line.

When will the project be completed? Although you may be tempted to follow the old adage take your worst estimate and double it, a successful project should include a thoughtfully prepared time line estimate. Establish due dates for the project milestones as well as a final completion date of the project. By including project milestones, you'll be able to monitor the progress of the project. If the project encounters setbacks along the way, you'll be able to resolve them and get the project back on schedule without jeopardizing the success of the entire project. As you monitor your project time line and gain experience with project management, you'll be better prepared to predict future project time lines.

7. Establish the budget and available resources.

The scope statement should include a realistic budget so that projects do not wind up costing more than originally projected. Budget statements should also include what resources are available. What personnel will be devoted to the project? Will existing hardware or software be used? Include a dollar amount for any items that must be acquired to complete the project. Staff or labor costs should be estimated in terms of the number of hours required to complete the project.

8. Reach Consensus.

The final step is to make sure that all of the key stakeholders of the project agree to the scope statement. Ask the stakeholders to provide feedback on your draft scope statement. Once the stakeholders are satisfied with the scope statement, a formal signature is ideal in order to keep everyone on the same page.

Although preparing a scope statement is a time-consuming and somewhat daunting process. The rewards will be exponentially related to the time spent creating the statement. A project statement does not have to be complicated. Even basic projects can benefit from a simple version of the format described above.

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