**CLIENT NAME**

# Scope Management Plan

## 1 Defining Scope

### 1.1 Product Scope

Product scope is defined as the features and functions that are to be included in the product or service. The customer’s requirements will shape the initial product scope and the Project Team (“PT”) will determine the technical requirements of the product or service using the customer’s requirements. The client’s requirements will be documented in the Project Proposal and the Project Summary document, which, along with the PT’s technical requirements, will function as the product scope baseline. The client’s formal approval of the Project Proposal is required before project work begins.

### 1.2 Project Scope

Project scope is defined as all of the work that must be done in order to deliver a website with the specified features and functions. The PT and the Project Manager (“PM”) will identify the activities necessary, and only those necessary, to design, develop, test, and deploy the product or deliver the service.

## 2 Scope Definition Processes

### 2.1 Project Summary document

The Project Summary document is completed by the Sponsor with information obtained from the Sponsor’s meeting(s) with the client. This document serves as the project Charter. The Project Summary document captures the client’s product scope in addition to information typically included in the Project Scope Statement. Information included in the Project Summary document is the primary input to the Project Proposal, which is formally approved by the client.

#### 2.1.1 Project Scope Statement

The Project Scope Statement will be created from information collected during the Sponsor’s meeting(s) with the client. The Project Scope Statement’s components will be included in the Project Summary document. Any information not obtained during the Sponsor’s meeting(s) with the client will be obtained from the client and PT by the PM. The Project Summary document is a Microsoft Excel spreadsheet. The Project Scope Statement components are:

* + *Project Objectives* – measurable success criteria
  + *Product scope description* – describes characteristics of product
  + *Project Requirements* – conditions/capabilities project and product must satisfy to meet stakeholder and other formal document requirements
  + *Boundaries* – what is and is not included in project
  + *Deliverables* – what project will produce to meet objectives
  + *Acceptance criteria –* defines the process and criteria for accepting completed products
  + *Constraints* – lists and describes constraints that limit the project team’s options (i.e. budget, milestones, contract provisions)
  + *Assumptions* –list assumptions made to proceed with planning; include list of impacts if assumptions prove to be false; assumptions will be revisited constantly during planning to determine if they are still valid assumptions or have been proven false; during the formal Risk Management activities remaining true assumptions will be analyzed as risks
  + *Initial Project Organization* – project team, sponsor, stakeholders, etc., including reporting organization
  + *Initial Risks* – list and describe any known risks; constraints and assumptions can be written as risks, so be sure to document them in at least one section
  + *Summary milestones* – usually become constraints
  + *Funding limits* – any funding limits placed on the project, whether total funding or over specified time frames
  + *Cost estimates* – usually high level at this point; important to put range of estimate (-50% - +100%)
  + *Configuration management requirements* – level of configuration management & change control to be implemented in project
  + *Specifications* - any formal specification document that project should comply with
  + *Approval requirements* – for documents, deliverables, objectives, work

### 2.2 Work Breakdown Structure

After the Project Scope Statement is created, the project Work Breakdown Structure (“WBS”) will be created from the WSI WBS Template in Microsoft Project. The template will be customized for each project to reflect the necessary activities to complete the product scope. The PT and PM will meet to determine the activities required, and only those activities required, to complete the product scope (i.e. build the product). The WBS represents the entire project scope; if activities are not included in the WBS they are not part of the project. Here are some components.

The WBS activities will be decomposed typically until they satisfy three criteria:

* + The activities are between eight (8) and 80 hours in duration. Requiring decomposition to this level allows the activities to be monitored and controlled more effectively. If an activity cannot be logically decomposed any further and exceeds 80 hours, identify activity milestones that can be used to essentially decompose the activity until this criteria is met.
  + Resources required can be estimated for each activity. If you cannot estimate the resources required it is fair to assume that you do not understand the work at a level necessary to complete it.
  + The activities can be assigned to one person/vendor/group/etc. This criteria identifies one party who is responsible for the activity’s completion.

Exceptions will be made on a case-by-case basis.

Each WBS activity will be identified using the default Microsoft Project WBS code.

### 2.3 Work Breakdown Structure Dictionary

The Work Breakdown Structure (“WBS”) Dictionary is created to provide detailed information for each WBS activity or element. The WBS Dictionary will be completed when supporting detail is required to complete the activity. The WBS Dictionary will be created in either (a) Microsoft Project (detail entered in the Task Information dialog box) or (b) Microsoft Excel (entries will be cross-referenced to the WBS activity using the Microsoft Project WBS code); use Microsoft Project when available. The WBS Dictionary can include, but is not limited to, the following information:

* + *Statement of Work* – what needs to be done
  + *Responsible Organization/Person* – who is ultimately responsible for the work package’s completion
  + *Schedule Milestones*
  + *Contract Information* – if applicable
  + *Quality Requirements*
  + *Technical References* – helps facilitate performance of work
  + *Resources Required* – people, equipment, materials, facilities, etc.
  + *Cost estimate*
  + *Predecessor Activities/Work Packages* – what is this work package/activity dependent on?
  + *Successor Activities/Work Packages* – what is dependent upon this work package/activity?
  + *Constraints & Assumptions*
  + *Location* – if not described in the Statement of Work section

### 2.4 Technical Requirements

The PT will be responsible for developing the technical requirements that will satisfy the product scope documented in the Project Proposal and Project Summary document.

## 3 Scope Monitoring and Controlling

### 3.1 Monitoring Scope Changes

#### 3.1.1 Product Scope

The product scope will be initially monitored by the PM. As product scope changes are identified by the client and PT, the PM will confirm the changes comply with the original product scope agreed upon in the Project Proposal and included in the Project Summary document, which will function as the product scope baseline. The resource responsible for testing the product will compare the product to the agreed upon product scope. The client will ultimately monitor the product scope by reviewing the design and final website.

#### 3.1.2 Project Scope

The project scope will be primarily monitored by the PM using the WBS and Project Scope Statement as a baseline.

### 3.2 Controlling Scope Changes

One aspect of successful projects is delivering the scope planned for and approved by the Sponsor; therefore, to deliver a successful project it is imperative to control changes to that scope. Uncontrolled scope changes (“Scope Creep”) include changes that are not identified, planned for and approved before they are implemented.

#### 3.2.1 Identifying & Planning Scope Changes

Changes to the approved product scope are primarily identified by the client, but could also be identified by the PT.

3.2.1.1 Product Scope

During a typical website development project the product scope, initially documented in the Project Proposal and approved by the client, will guide the PT to create their technical requirements of the initial design. The initial design will be reviewed by the client, at which point changes will typically be requested then planned and implemented by the PT. Per a typical Project Proposal, the client is permitted three (3) iterations of review and changes before they incur an additional fee. If the client has additional changes after the third iteration of changes have been implemented, the Sponsor will determine the appropriate fee to complete the requested changes. This cycle of changes also applies to the final website design review conducted after the website’s design is developed and content populated.

3.2.1.2 Project Scope

Changes to the approved project scope documented in the Project Scope Statement, WBS, and WBS Dictionary, are identified and planned by the PM, PT, and Sponsor. Planning includes analyzing the changes’ effect on other project constraints (i.e. time, cost, customer satisfaction, quality, risk), which helps determine whether it will be approved. If approved the change will be planned and the project management documents updated.

#### 3.3.2 Approving Scope Changes

3.3.2.1 Product Scope

Product scope changes that do not modify the product scope stated in the Project Proposal are initially approved by the PM and ultimately approved by the client. In a typical website development project, the client approves the website design by signing the Client Design Approval form.

If a change does modify the product scope stated in the Project Proposal, the Sponsor will determine any additional fee incurred by the client for the change to be implemented.

3.3.2.2 Project Scope

Project scope changes are approved by the PM.

## 4. Scope Verification

Scope verification is the process used to gain formal acceptance of product and project deliverables.

### 4.1 Product Scope

During a typical website development project the product scope is initially documented in the Project Proposal and approved by the client. After their approval and the project scope is identified and planned, the PT begins creating the initial design. The initial design will be reviewed by the client, at which point changes will typically be requested then planned and implemented by the PT. Per a typical Project Proposal, the client is permitted three (3) iterations of review and changes before they incur an additional fee. If the client has additional changes after the third iteration of changes have been implemented, the Sponsor will determine the appropriate fee to complete the requested changes. This cycle of changes also applies to the final website design review conducted after the website’s design is developed and content populated. The final website is released to the client after it is uploaded to the hosting service and tested by the PT.

### 4.2 Project Scope

The project scope’s deliverables include:

* + The Proposal
  + The Project Summary document
  + Scope Management Plan
  + WBS
  + Technical Requirements document
  + Time Management Plan
  + Schedule
  + Cost Management Plan
  + Budget
  + Quality Management Plan
  + Human Resources Management Plan
  + Communications Management Plan
  + Risk Management Plan