



## **Project Scope Statement**

The Project Scope Statement is a narrative description of the project. At a minimum, the Scope Statement should include the justification of the project, description of the product or service to be created, and criteria for measuring project success. A Scope Statement can include all or some of the following components based on the size of the project and the organizational needs. The Scope Statement needs to be in writing and approved by a Key Project Contact in order to provide a documented basis for making future project decisions and to control scope creep during the life of the project.

### **Components of a Project Scope Statement**

- 1. Project Justification** (why)
- 2. Project Description** (who, what, when, where)
- 3. Project Deliverables** (additional whats)
- 4. Project Objectives** (criteria for success)
- 5. Constraints** (restrictions)
- 6. Assumptions** (considered truths)
- 7. Issues and Concerns** (anything else)



## Project Scope Statement Template

<b>Project Scope Statement</b> page 1	
Project Title:	Date:
Project Manager:	
Key Project Contact:	
1. Project Justification: (why)	
2. Project Description: (who, what, when, where)	
3. Project Deliverables: (additional whats)	



## Project Scope Statement Template

### Project Scope Statement

page 2

4. Project Objectives: (measurable success criteria)

5. Constraints: (restrictions on time, resources & scope)

6. Assumptions: (considered truths)

7. Issues and Concerns: (anything else)

Written by:

Date:

Approved by:

Date:



## Project Justification

There are many reasons to start projects. The reasons vary from industry to industry. Project Justification is the process of defining the reason for the project, why are we doing this project, what problem is it solving, what business need is it addressing.

Project Initiation is the process of formally authorizing a new project or that an existing project should continue into its next phase. Some projects have formal initiation processes and some projects have informal beginnings.



### Justification

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### Benefits

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## Project Description

### Who?

Who is the project audience?  
Who will be using the project deliverables?  
Who is the project designed to help or assist?

### What?

What will the project look like when it is completed?  
What is the final deliverable?  
Is it an event, a product, a document?

### When?

When will it begin?  
When will it be completed?

### Where?

Where will it be used?  
Where will the event take place?  
Where will the work be done?

**A Deliverable** is something delivered as part of, or at the end of the project, such as a product, service, process or plan.

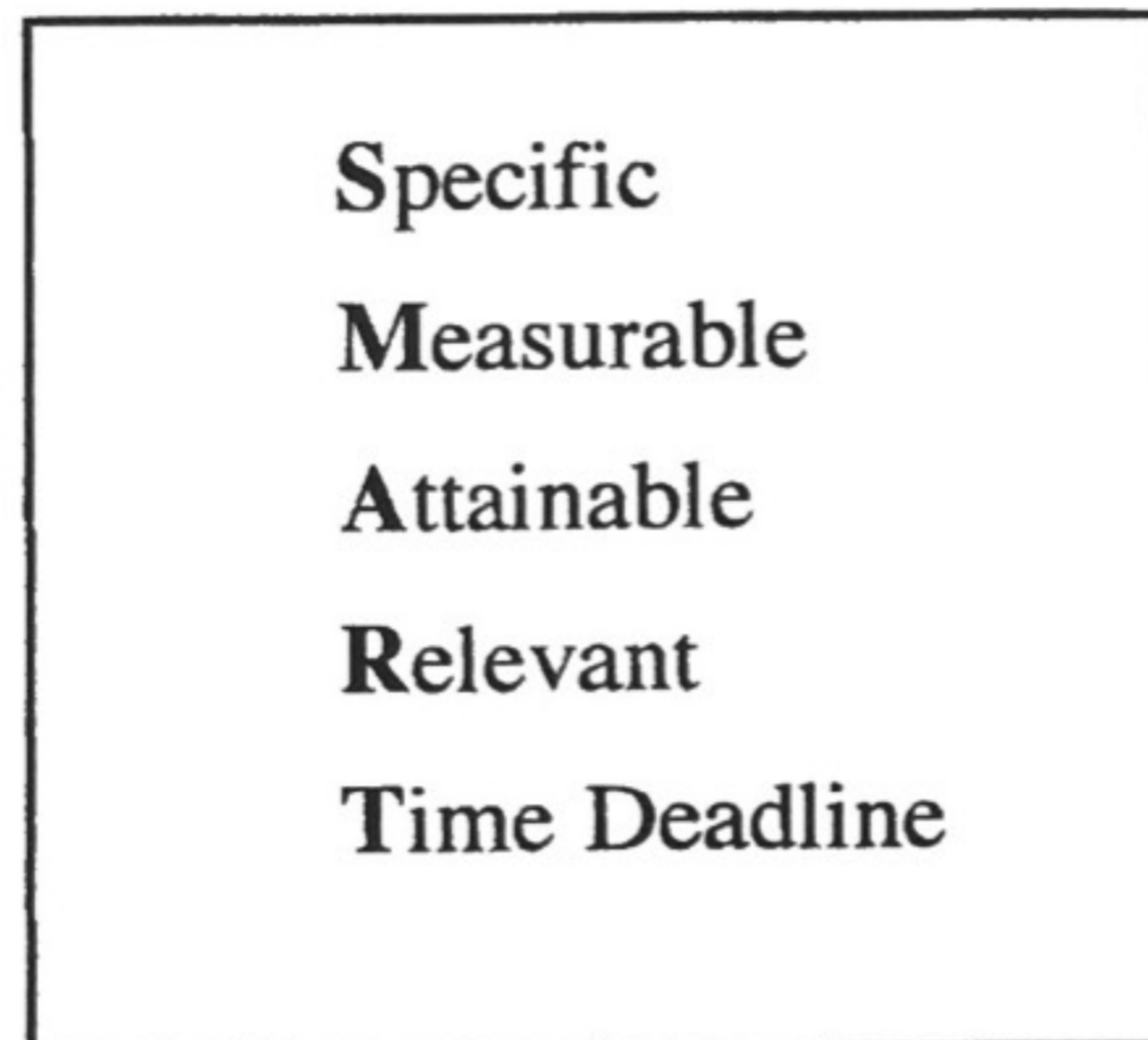
*Project Management Body of Knowledge*



## Objectives

**The project objectives are the criteria that indicate project success.**

They must be specific and measurable leaving no room for disagreement. Written project objectives can keep the project focused and clearly state how the main stakeholders will decide if the project was successful.



### Specific

Are the project objectives clear, understandable, distinct?  
 Can anyone with a basic knowledge of the project understand the objectives?  
 Do the objectives clearly define what the project will and will not do?

### Measurable

Are the objectives ambiguous and fuzzy?  
 Can the project's objectives be measured upon completion?  
 What will be the measurement criteria for project success?  
 Are the measurements understandable by everyone, leaving no room for disagreement or confusion?

### Attainable

Are the project objectives possible to achieve, given the available resources, knowledge, skills and time?

### Relevant

What benefits will this project provide to the stakeholders?  
 Do the project objectives address the reason for the project, the justification?

### Time Deadline

Is there a stated completion date that is attainable?

If you don't know what you're doing, you don't know when to stop.

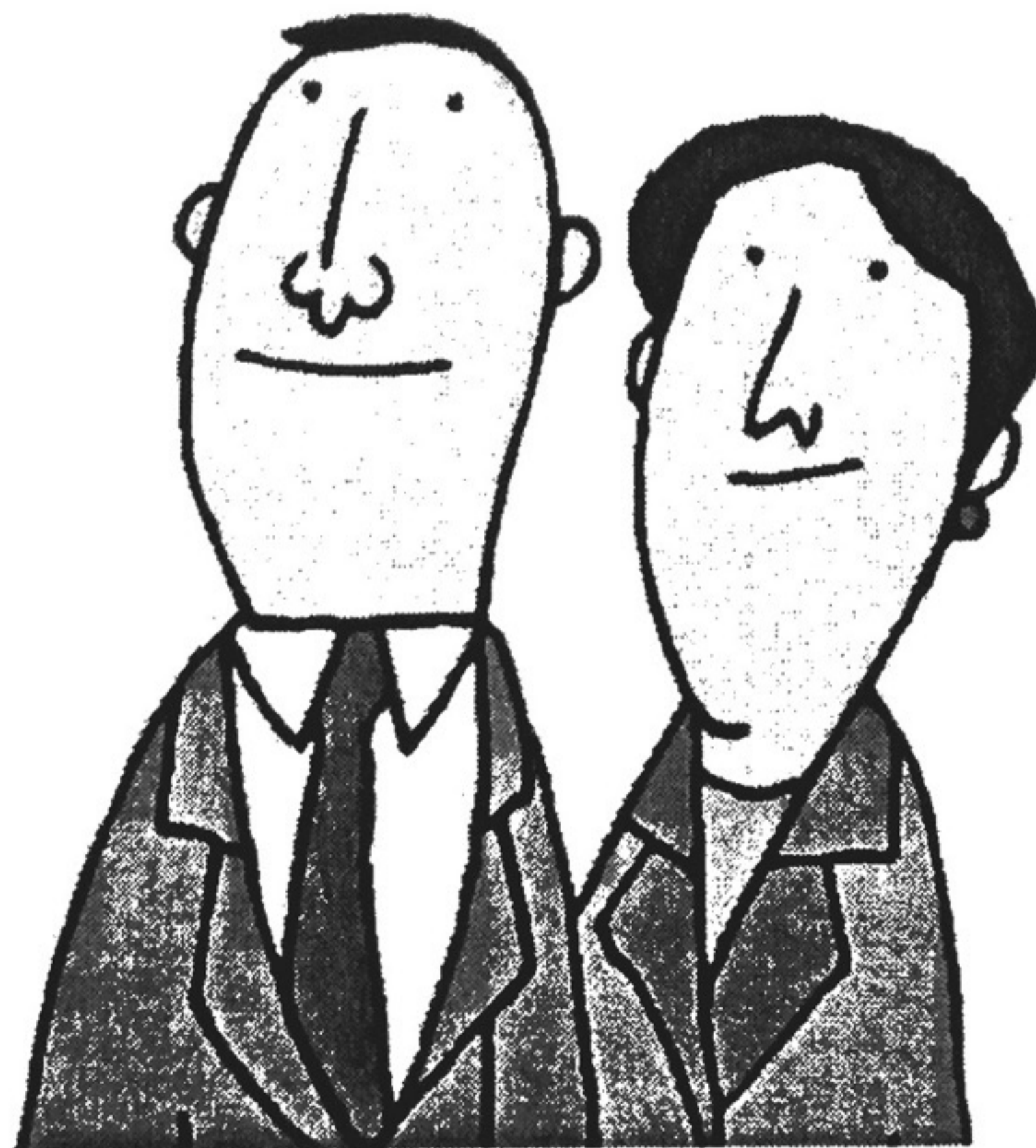
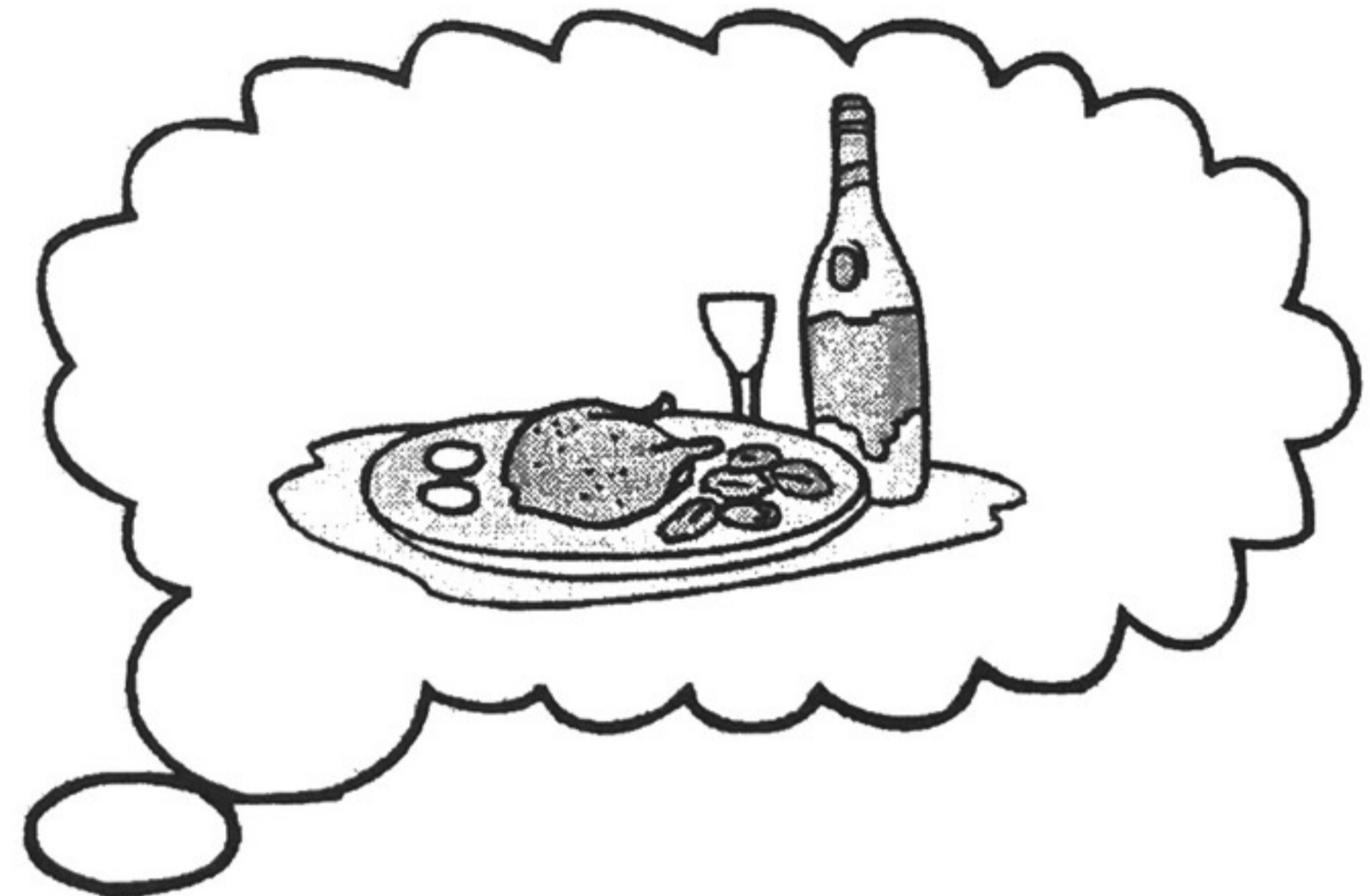
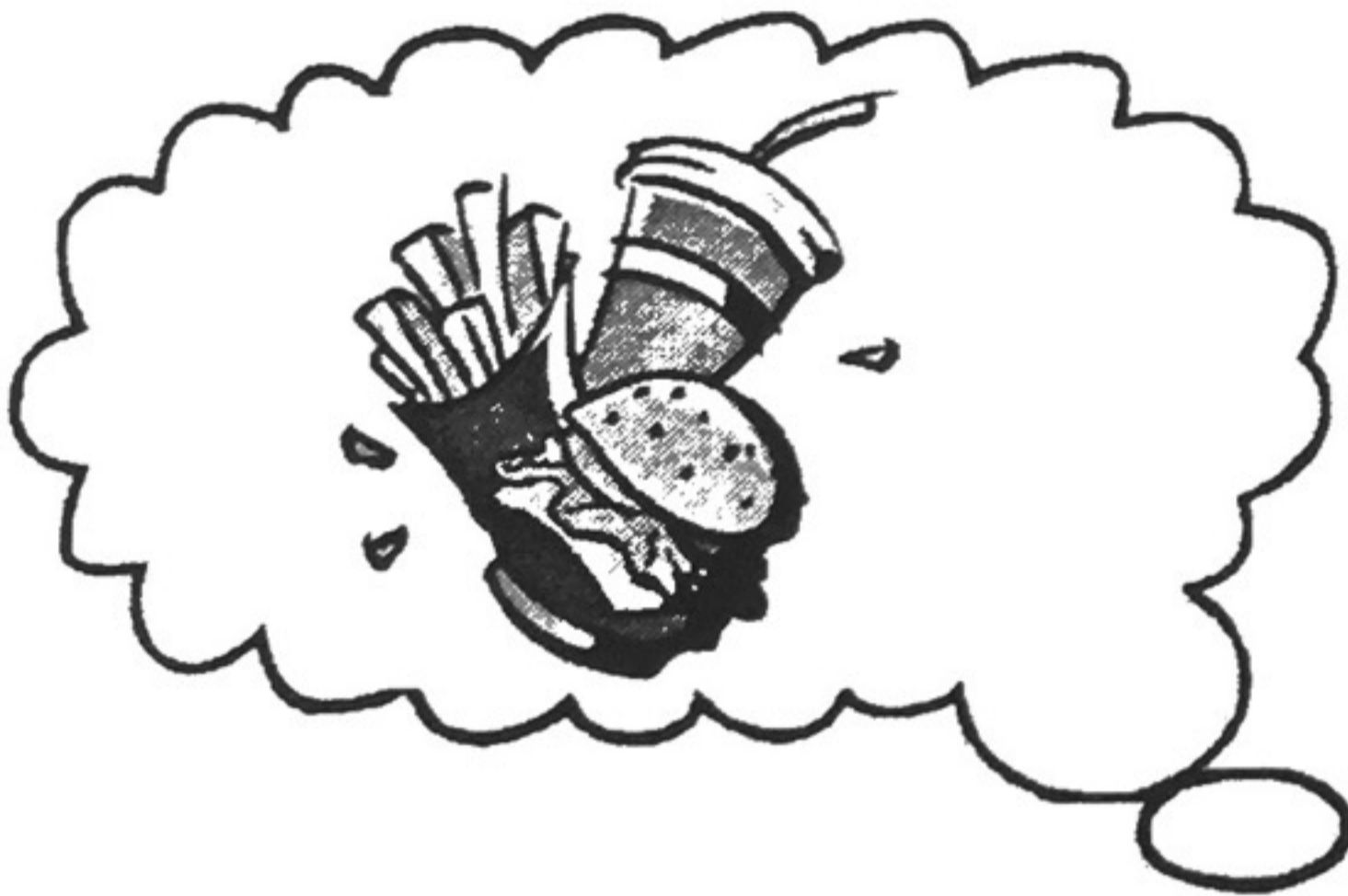
~ Unknown



## Assumptions

**Assumptions** are factors that, for planning purposes, are considered to be true, real, or certain. It is very helpful for project teams to identify and document their assumptions as part of their Clarifying Process. Assumptions should be validated by the Key Project Contact in order to avoid wrong assumptions. Wrong assumptions can impact the project process and the project's ultimate success.

At the beginning of a project, there can be many unknowns. Assumptions should be checked during the life of the project, they may need to be changed as more information is known by the project team. Addressing assumptions may become a regular agenda item at Project Status Update meetings.



**Let's go out for dinner!**



## Interviewing Questions

### Exploring and Clarifying Questions

*How will you measure the success of this project?*

*How will you know that the project was successful?*

*What measurement will you use to decide if the project was successful?*

*What would you see that would indicate success to you?*

*Can you **describe** what you envision the end result looking like?*

*Tell me more about the deliverables, what will they look like?*

### Summarizing Statements

*Let me make certain I understand, you want ...*

*As I get it, you want .....*

*So, as you see the project it will .....*

*As I hear it, you said that .....*

*What I'm hearing you say is .....*

### Verifying Questions

*Is that correct?*

*Am I on target?*

*Am I right about that?*

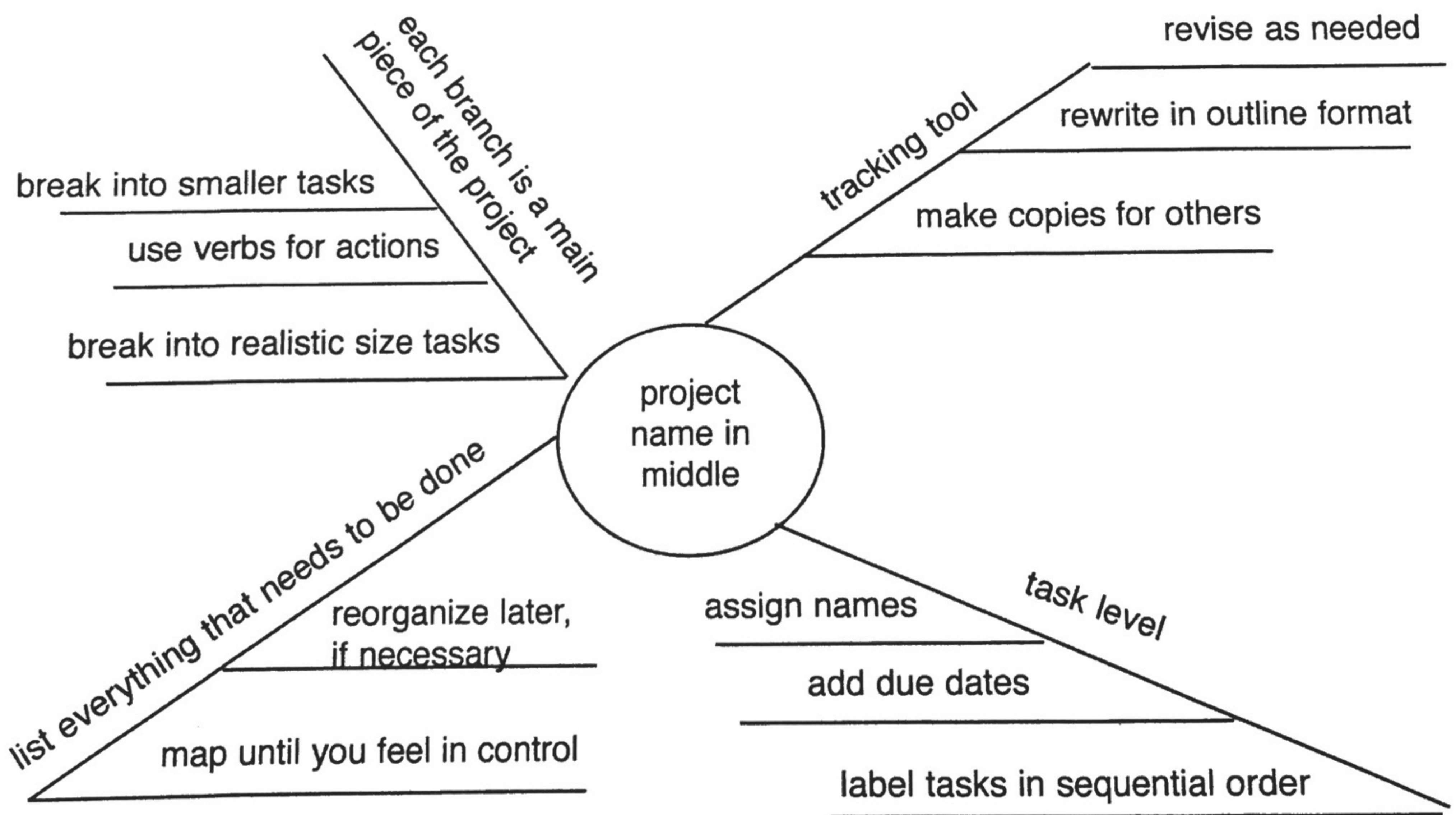
*Is there anything else?*





## Project Mapping

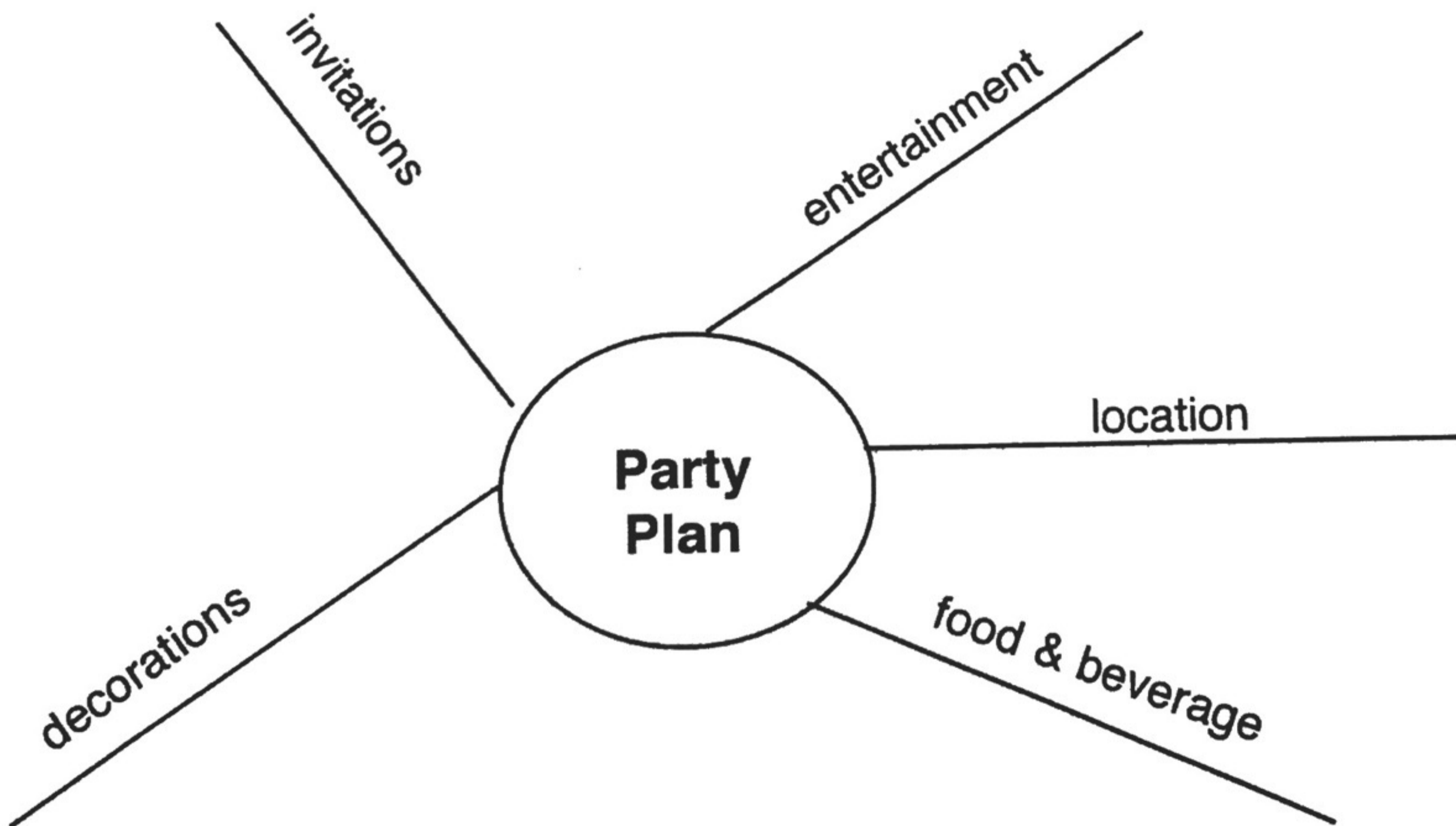
- ❖ There are no wrong maps
- ❖ Main categories first
- ❖ Add in details
- ❖ If it's in your head, map it
- ❖ Neatness does not matter
- ❖ Spelling does not matter
- ❖ Work fast
- ❖ Quantity vs. quality
- ❖ Use symbols, images
- ❖ No judgement
- ❖ No editing
- ❖ Clean up and organize later





## Project Planning Map

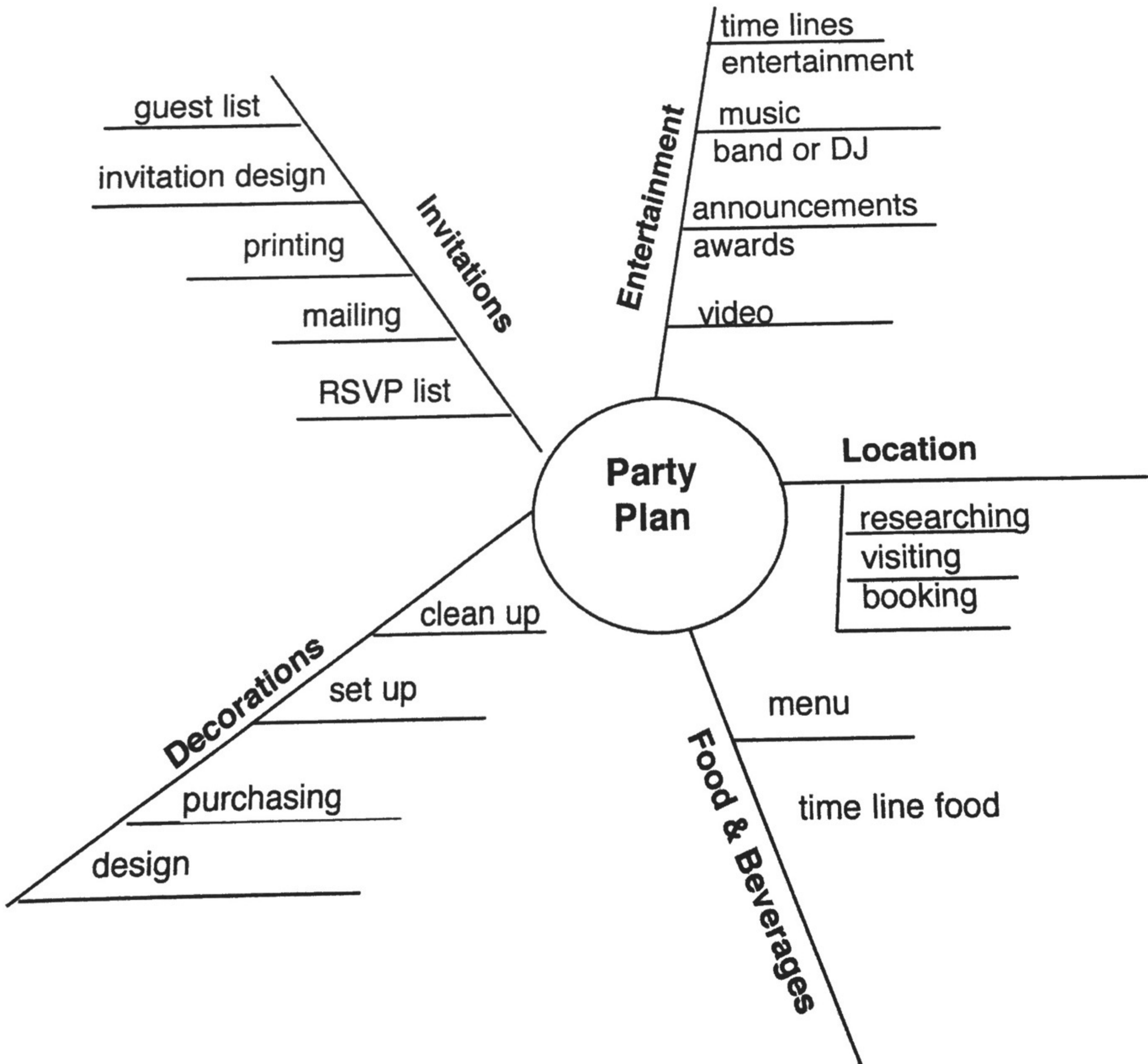
1. Identify major pieces of project.





## Project Planning Map

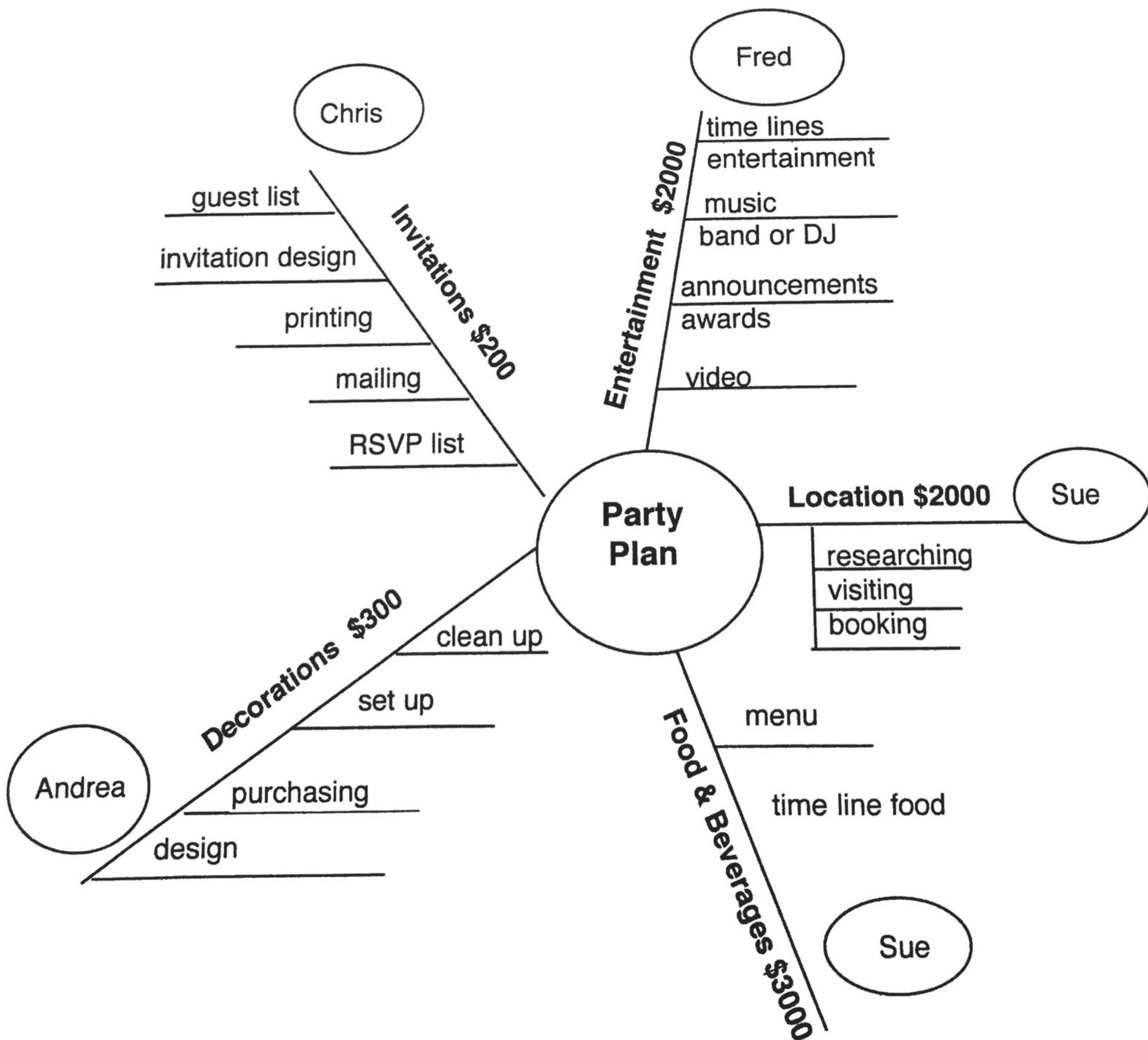
2. Break major pieces into areas of responsibilities or sub-sections.





### Project Planning Map

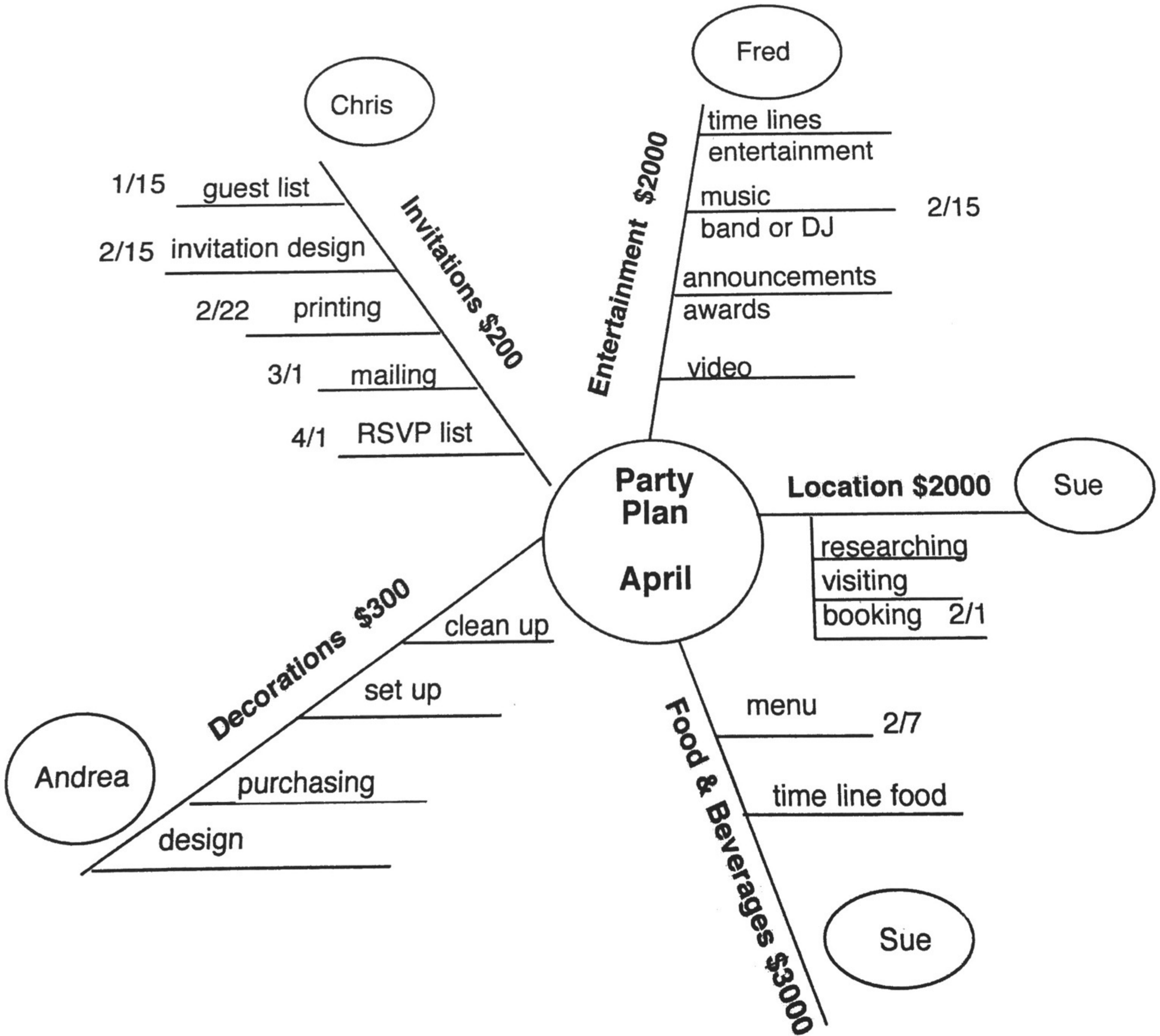
3. Assign responsible person and estimated budget for each major piece.





# Project Planning Map

4. Assign estimated due dates to key milestones.

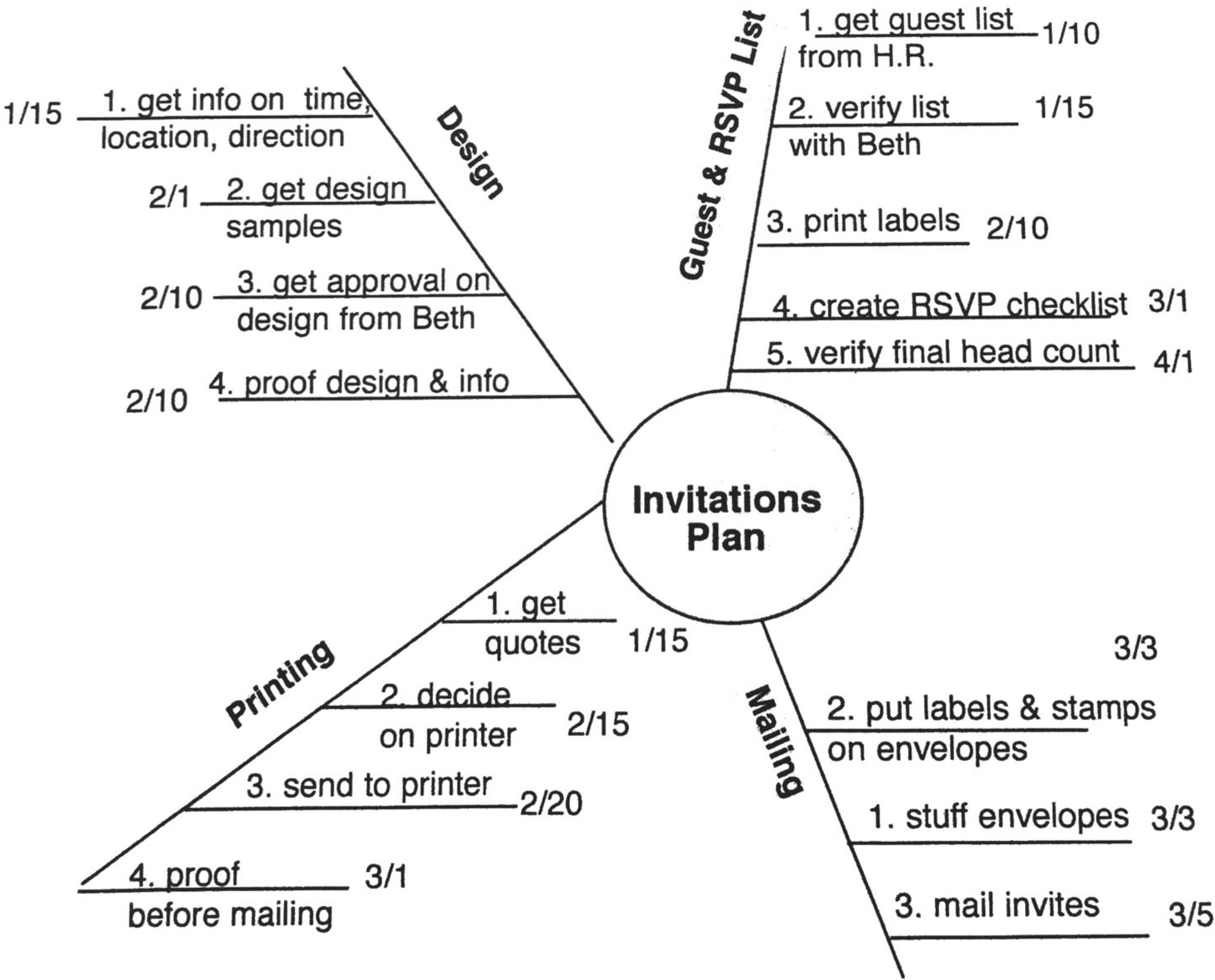




# Project Planning Map

5. Break each sub-section into activities and tasks.

6. Sequence and Assign Estimated Due Dates to Activities and Tasks.





## Risk Analysis

7. Conduct a Risk Analysis.

### Risk Analysis Process

1. List all the potential risks associated with the project.  
What could go wrong with the project?  
What are the potential consequences?  
What are the uncertainties in the project?
2. Analyze each risk in relation to it's probability and seriousness/impact.
3. Plan ways to address risks.

<b>1</b> <b>Low</b>	<b>2</b>	<b>3</b> <b>Medium</b>	<b>4</b>	<b>5</b> <b>High</b>
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Potential Risk	Probability	Seriousness/Impact
1. weather	5	2
2. no one attends	1	5



# Risk Response Planning

## Tools and Techniques of Risk Planning

**1. Avoidance.** Risk avoidance is changing the project plan to **eliminate** the risk or condition. Although the project team can never eliminate all risks, some specific risks may be avoided. One way to avoid risk may be to redesign the project scope to better align with the available resources.

- ❖ Change the party location to an inside venue to avoid the weather.
- ❖ Using a known vendor instead of trying someone new.

**2. Transference.** Risk transference is seeking to shift the consequence of a risk to a third party. It includes the use of insurance, warranties and guarantees. Contracts may be used to transfer liability for specified risks to a third party. Transferring risk simply gives another party responsibility for its management; it does not eliminate the risk.

- ❖ Insurance
- ❖ Warranties
- ❖ Guarantees

**3. Mitigation.** Mitigation seeks to **reduce** the probability and/or consequences of an adverse risk event to an acceptable threshold. Taking early action to reduce the probability of a risk occurring or its impact on the project is more effective than trying to repair the consequences after it has occurred. Mitigation costs should be appropriate, given the likely probability of the risk and its consequences.

- ❖ Getting reliable references on vendors.
- ❖ Checking with the town hall for competing local events on the same day.

**4. Acceptance.** This technique indicates that the project team has decided not to change the project plan to deal with a risk or is unable to identify any other suitable response strategy. Acceptance may involve creating a contingency plan in case the risk does occur.

- ❖ Decide to keep the outdoor decorations, even though it could rain.





## Work Breakdown Structure

8. Create a written Work Breakdown Structure.

Project Task List						
Project Title: Hannian Tileworks 10th Anniversary Party						
✓	#	Task	Duration	Start	End	Who
	<b>1.0</b>	<b>Location</b>				<b>Sue</b>
	1.1	Scout 5 locations	1 hr	1/1	1/7	
	1.2	Visit locations get price list & menus try food	8 hrs	1/7	1/14	
	1.3	Decide on location	1 hr	1/14	1/21	Team
	1.4	Book location	1 hr	1/21	1/28	
	<b>2.0</b>	<b>Entertainment</b>				<b>Fred</b>
	2.1	Call 3 D.J.s get references & prices	1 hr	1/1	1/7	
	2.2	Visit	8 hrs	1/7	1/21	
	2.3	Decide	1 hr	1/28	2/7	
	2.4	Book		2/14	2/21	
	<b>3.0</b>	<b>Invitations</b>				<b>Chris</b>
	3.1	Create list	5 - 7 hrs	1/1	1/14	
	3.2	Design	3 hrs	1/1	2/7	
	3.3	Decide	1 hr	2/14	2/21	Team
	3.4	Printing	1 wk	2/21	2/28	
	3.5	Mailing	1 wk	2/28	3/7	
	3.6	RSVP	3 wks	3/7	3/28	



## Gantt Charts

**Duration:** The amount of time a task takes. It can be defined in terms of days, weeks or months.

**Dependency:** A task that cannot begin until its predecessor tasks are completed.

*Example: Invitations cannot be sent until the invitations are bought, printed and addressed.*

**Predecessor:** The task that must be done first.

*Example: A theme needs to be decided before decorations can be purchased.*

**Parallel Task:** A task that can be done during the same time frame as one or more other tasks.

*Example: Researching locations and researching entertainment could be done simultaneously.*

**Slack/Float Time:** The extra time available to complete a task without delaying the start of subsequent tasks.

*Example: If the theme is decided early there may be slack time between that decision and the purchase of decorations.*

**Critical Path:** The path through the project that takes the longest total time, and therefore determines the earliest possible time the project can be completed. All activities on this path generally have zero float time.

*Example: If there is a delay with the invitations, and they are mailed late, that could impact the number of attendees and therefore impact the party's success.*



## Time Estimation

Accurate time estimation is a skill essential to good project management. Usually people vastly underestimate the amount of time needed to implement projects. This is true particularly when they are not familiar with the task to be carried out. They forget to take into account unexpected events or unscheduled high priority work.

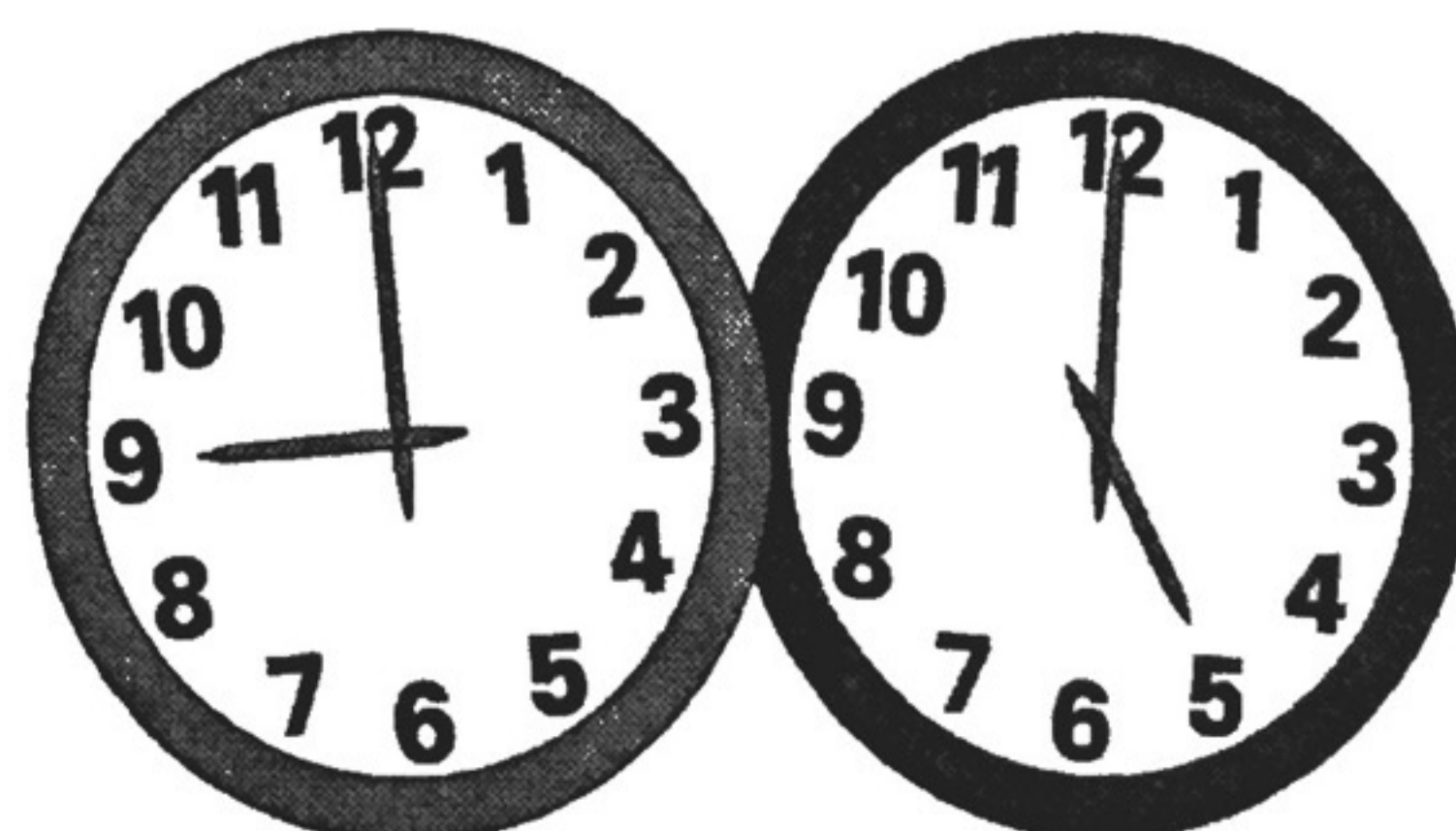
People also often simply fail to allow for the full complexity involved with a job. You can lose a great deal of credibility by underestimating the length of time needed to implement a project. If you underestimate time, not only do you miss deadlines, you also put other project workers under unnecessary stress.

The first stage in estimating time accurately is to fully understand what you need to achieve. This involves reviewing the task in detail so that there are no unknowns. When you have this, you can make your best guess at how long each task will take to complete.

Ensure that within your estimate you also allow time for detailed project planning and management, liaison with outside people, meetings, quality assurance and any supporting documentation necessary.

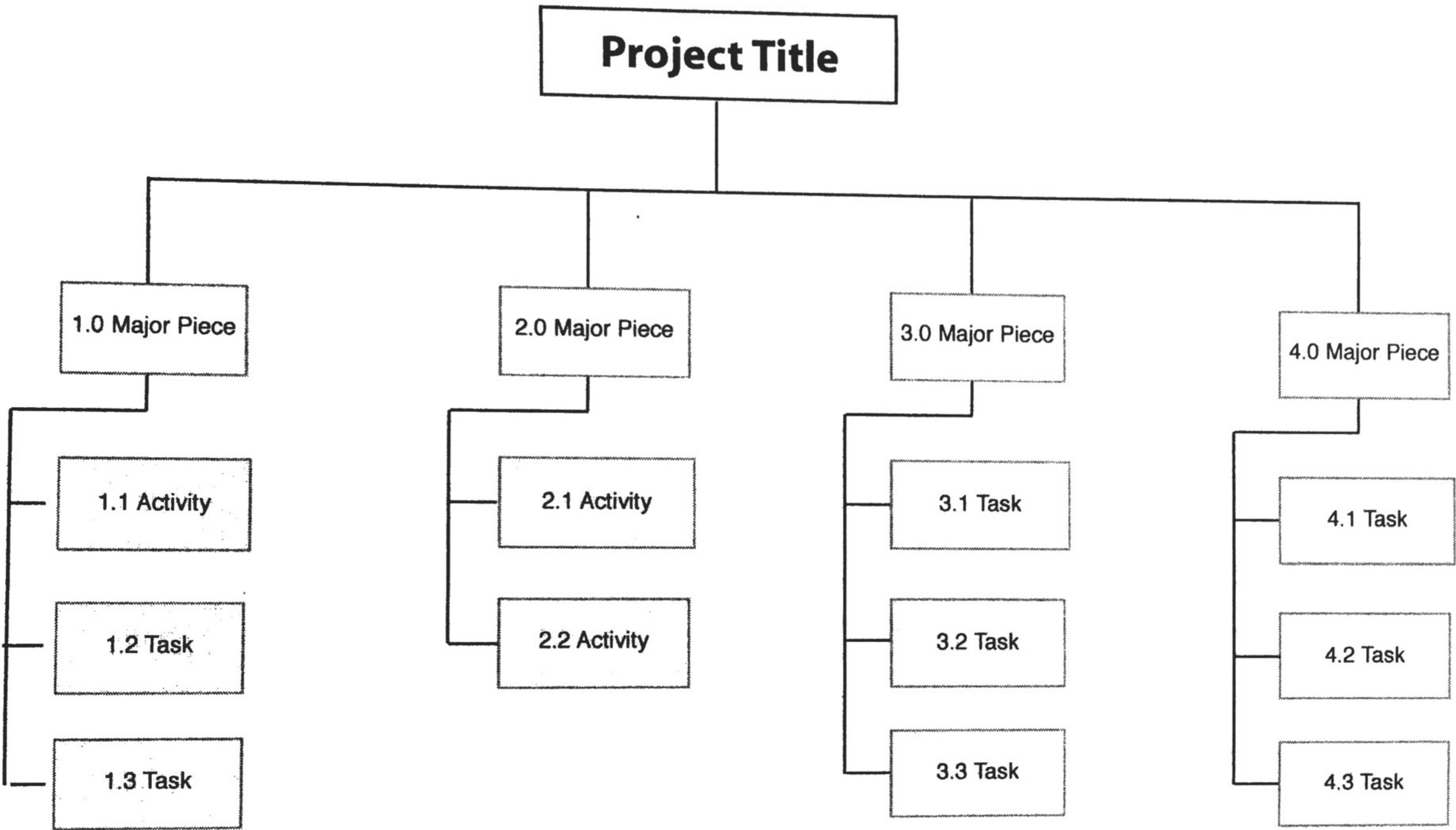
Also allowed time for the following situations, these factors may double (or more than double) the length of time needed to complete a project.

- \* Conflicting priorities
- \* Accidents and emergencies
- \* Internal meetings
- \* Holidays, sickness and scheduled leave time
- \* Approval processes
- \* Breakdowns in equipment
- \* Missed deliveries by suppliers
- \* Interruptions
- \* Quality control rejections





# Work Breakdown Structure





## Status Update

Status Update		
Project Title:	Project Manager:	
Major Piece:	Name:	Date:
1. Overall time status of your piece of the project? On schedule Waiting on Information Behind schedule Explain:		
2. Overall budget status of your piece of the project? Within budget Over budget Explain:		
3. Overall scope status of your piece of the project? Within scope Scope Issues Explain:		
4. Information/data needed from others?		
5. Other Issues and concerns?		



## Change Request

### Change Request Form

Project Title:	Date of Request:
Project Manager:	Submitted by:
Key Project Contact:	
1. Description of Change:	
2. Reason for Change:	
3. Impact of Change on Project Time, Scope & Resources:	
4. Impact on Project without Change:	
5. Resolution of Request:	Date:
6. Change authorized by:	Date:



## Weekly Planning



- 1. Map everything you have/want/need to do.**
- 2. Identify QII activities for the week.**
  - ❖ Consider weekly “hats”.
- 3. Review sources of responsibilities.**
  - ❖ Previous week’s task list.
  - ❖ Personal and professional calendars.
  - ❖ Project lists.
  - ❖ Monthly, quarterly and/or yearly lists.
- 4. Prioritize**
  - A = will be done this week
  - B = probably will be done this week
  - C = if a miracle happens
  - D = delegate or delete
- 5. Schedule on task lists and calendar.**



## Daily Prioritizing



- 1. Review the day's results.**
- 2. Prioritize daily tasks.**
  - A = will be done today
  - B = probably will be done today
  - C = if a miracle happens
  - D = delegate, defer or delete
- 3. Leave time for unplanned events.**
- 4. Close out at end of the day.**





## Work Scope Statement

1. Work Assignment:

2. Delegated to:

Delegated by:

3. Today's Date:

Due Date:

4. Contact Person:

5. Justification: (why)

6. Description: (who, what, when, where)

7. Deliverables: (additional whats)



## Work Scope Statement (page 2)

8. Objectives: (measurable success criteria)

9. Constraints: (restrictions of time, resource & scope)

10. Additional Resources:

11. Assumptions, Issues and Concerns: (anything else)

12. Status Updates:

Who?

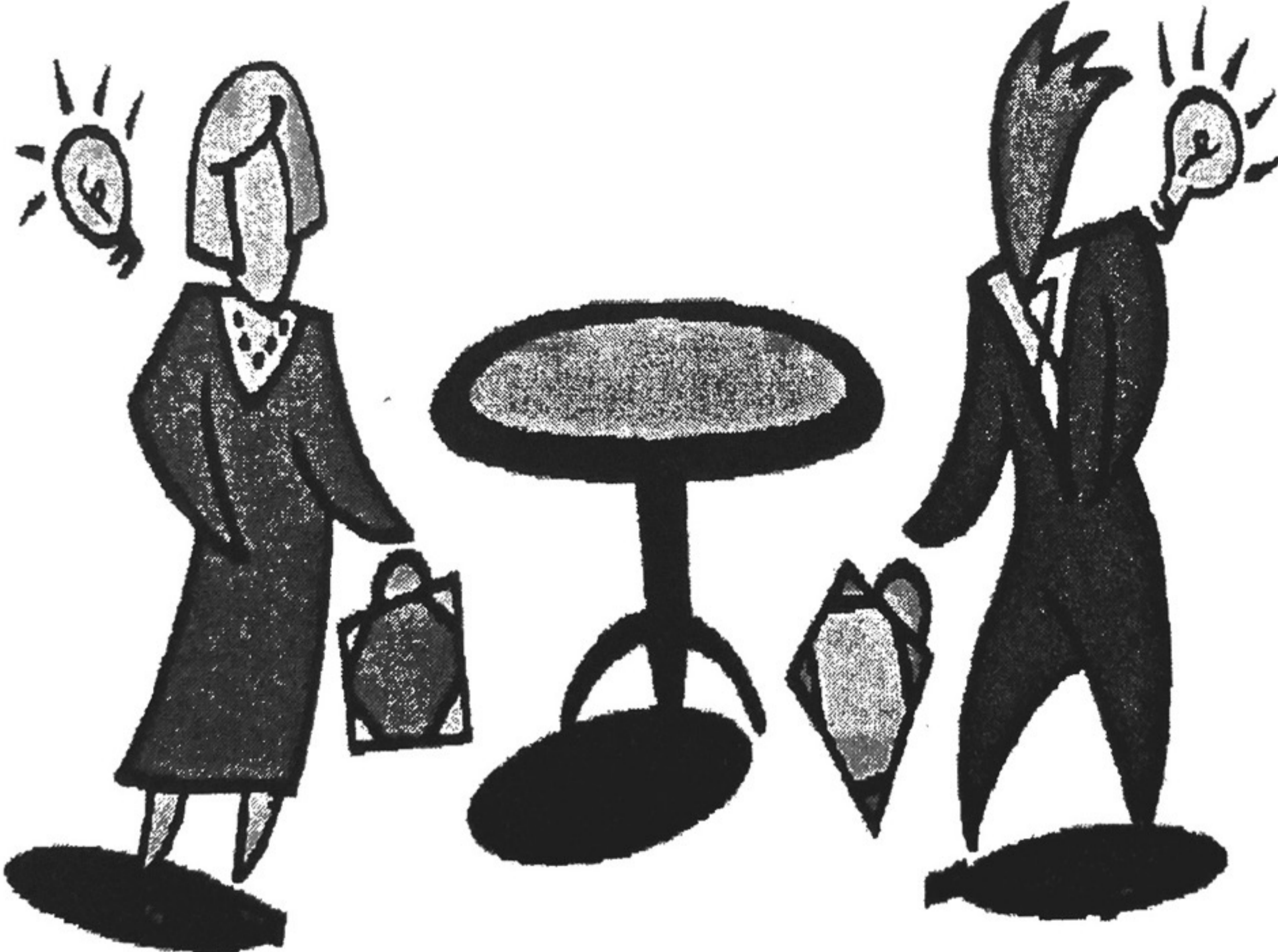
What?

When?

How?



# Meetings





## General Meeting Format



1. **Begin on time.**
2. **Welcome and thank everyone for coming.**
3. **Summarize the purpose and desired outcomes.**
  - ❖ Use “we” language instead of “I”
  - ❖ “What we want to accomplish today is ...”
  - ❖ “What I want to accomplish is ...”
4. **Review ground rules for meetings.**
  - ❖ Set up ground rules at first project team meeting.
  - ❖ If possible have the rules typed and posted during team meeting.
  - ❖ Assign roles for today’s meeting: leader, timekeeper and note taker.
5. **Review the agenda.**
  - ❖ The agenda was sent to everyone before the meeting.
  - ❖ Consider setting time frames for each agenda item.
  - ❖ Bring extra copies for those who forgot their agenda.
  - ❖ Post a large copy of the agenda to help focus attention.
  - ❖ Make certain the agenda contains a review of past action items.
6. **Ask for any additional agenda items.**
  - ❖ Consider priority and time constraints.
  - ❖ New items may need to be addressed at another time.
7. **Begin discussing agenda items.**
8. **Summarize key decisions and action items.**
  - ❖ Make certain everyone is in agreement about action items, responsibilities and due dates.
9. **Agree on next meeting date, time and location.**
10. **End on time.**



## Meeting Planner

### Meeting Planner

1. Date:

Time:

Location:

2. Leader:

Timekeeper:

Notetaker:

3. Purpose:

4. Outcomes:

5. Agenda:

Who:

Time:



## Meeting Planner

Meeting Planner		
6. Attendees:		
7. Preparation:		
8. Notes:		
9. Action Items:	Who:	When:
10. Next Meeting:	Date:	Time:
		Location: