Managing Project Scope

Summary and Next Steps
Course Structure

- Getting Started
- Module 1 – Foundation Concepts
- Module 2 – Progressive Elaboration of Scope
- Module 3 – Monitoring and Controlling Scope
- Module 4 – Project Closeout
  - Summary and Next Steps

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Participant’s Notes:

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Recap – Course Goal

The goal of this course was to equip you with the necessary knowledge, skills, and techniques so that managing scope becomes an ongoing process throughout the life of the project. The intent is to make scope management a team game.

Participant’s Notes:

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Recap – Course Objectives

Now that you are at the end of the course, you should be able to:

- Describe the full spectrum of processes that constantly interact during a project life cycle to impact scope
- Articulate the nature and characteristics of requirements definition
- Create a scope document
- Decompose a scope document into a Work Breakdown Structure (WBS)
- Explain how to activate Integrated Change Control very early in the project life cycle
- Describe how to manage scope during the execution project phase.
- Describe how to validate scope and document lessons learned

Participant’s Notes:

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Self Reflection: Your Personal Action Plan

Did you remember to:

- Keep your action plan worksheet available?
- Record the learnings aligned with each course objective?

Participant’s Notes:

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Stepping Through the Elaboration Process

- Project Work Request
- Business Case
- Requirements/Architecture Review
- Project Objectives, Assumptions, Constraints
- Initiation & Definition
- Requirements Definition Document
- Work Breakdown Structure
- Scope Statement
- SOW, CSOW
- Performance Management
- Cost & Schedule
- Project Work Request
- Business Case
- Requirements/Architecture Review
- Project Objectives, Assumptions, Constraints
- Initiation & Definition
- Requirements Definition Document
- Work Breakdown Structure
- Scope Statement
- SOW, CSOW
- Performance Management
- Cost & Schedule

Participant’s Notes:

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Requirements and Scope Management Provides the Process

- Business Objectives
  - The reason for the project: Process more trades per hour to meet increased business volume
- Project Objectives
  - The deliverable that will satisfy the business objective, within a specified time and cost: Deliver a new system to process trades in 25% less time by "next Tuesday" for under $3,000,000
- Product Requirements
  - Technical
  - Behavioral
  - Functions
  - Features

Participant’s Notes:

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Validate Scope – Process View

- Project Performance Reports
- Scope – WBS plus Changes
- Contract
- Project Plan/Product Descriptions

Validate Scope

- Test Plan
- Client Acceptance Plan
- Inspections (reviews, audits walk-through)

Formal Acceptance
- Documented
- For:
  - Deliverable
  - Phase of project
  - Complete project

or

Project or Phase Not Accepted
- Punch list (rework)
- Corrective action
- Lessons Learned

Participant’s Notes:

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Review of Expectations

Did the course meet your expectations?
How will you use the new knowledge back on the job?

Participant’s Notes: Please provide feedback to the instructor.

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Self Reflection: Learning Journal and Lessons Learned

- Retrieve your learning journal.
- What questions do you have that need answered? Write them down.
- Which ideas and concepts from the module were most valuable for you?
- How can these ideas and concepts be implemented in your organization?
- Journal your thoughts.

Participant’s Notes:

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We really appreciate your attendance and participation in this course. If you found this to be a valuable experience, please recommend the course to your friends and coworkers!

The instructor will now solicit your feedback by handing out a course evaluation sheet. Please complete the evaluation and place it on the instructor’s table as you leave the classroom. If you are taking this class in IIL’s virtual eLearning environment, complete the evaluation form online.