



Project Management (Part 2) - Clarifying What You Are Trying to Accomplish and Why

An Online Continuing Education Course for Engineers

Course Number: P-2012

Credit: 2 Hours / 2 PDH / 2 CPD

Project Management (Part 2) - Clarifying What You Are Trying to Accomplish and Why

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Project Management For Dummies ®, 4th Edition by Stanley E. Portny [ISBN: 978-1-118-49723-4]

Project Management (Part 2) — Clarifying What You're Trying to Accomplish And Why

In This Course

- ▶ Identifying your project's purpose with the Scope Statement
 - ▶ Understanding how your project fits into the big picture
 - ▶ Defining project constraints — and working with them
 - ▶ Making assumptions to deal with the unknowns of your project
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All projects are created for a reason; someone identifies a need and devises a project to address that need. How well the project ultimately addresses that need defines the project's success or failure.

This course helps you develop a mutual agreement between your project's requesters and your project team about the project's goals and expectations. It also helps you establish the conditions necessary to perform the project work.

Defining Your Project with a Scope Statement

A *Scope Statement* is a written confirmation of the results your project will produce and the constraints and assumptions under which you will work. Both the people who requested the project and the project team should agree to all terms in the Scope Statement before actual project work begins

A good Scope Statement includes the following information:

- ✓ **Justification:** A brief statement regarding the business need your project addresses. (A more detailed discussion of the justification for the project appears in the project charter.)
- ✓ **Product scope description:** The characteristics of the products, services, and/or results your project will produce.
- ✓ **Acceptance criteria:** The conditions that must be met before project deliverables are accepted.
- ✓ **Deliverables:** The products, services, and/or results your project will produce (also referred to as *objectives*).
- ✓ **Project Exclusions:** Statements about what the project will not accomplish or produce.
- ✓ **Constraints:** Restrictions that limit what you can achieve, how and when you can achieve it, and how much achieving it can cost.
- ✓ **Assumptions:** Statements about how you will address uncertain information as you conceive, plan, and perform your project.



Remember

Think of your Scope Statement, when viewed together with the other components of your project plan, as a binding agreement in which

- ✓ You and your team commit to producing certain results.
Your project's requesters commit that they'll consider your project 100 percent successful if you produce these results.
- ✓ You and your team identify all restrictions regarding your approach to the work and the resources you need to support your work.
Your project's requesters agree that there are no restrictions other than the ones you've identified and that they'll provide you the support you declare you need.
- ✓ You and your team identify all assumptions you made when setting the terms of your Scope Statement.
Your project's requesters agree that, if any of these assumptions prove to be invalid, you may have to modify some or all of your project plans.

A well-written Scope Statement is an important resource for helping to manage stakeholder expectations.



Remember

Of course, predicting the future is impossible. In fact, the farther into the future you try to look, the less certain your predictions can be. However, your Scope Statement represents your project commitments based on what you know today and expect to be true in the future. If and when situations change, you have to assess the effect of the changes on all aspects of your project and propose the necessary changes to your Scope Statement. Your project's requesters always have the option of either accepting your proposed changes (and allowing the project to continue) or canceling your project.

Documents closely related to the Scope Statement

Your organization may use a number of other documents, like the ones I list here, that address issues similar to those included in the Scope Statement. When you use these other documents as sources of information to prepare or describe your project plan, be careful to note how they differ from the Scope Statement:

- ✓ **Market requirements document:** A formal request to develop or modify a product. This document (typically prepared by a member of your organization's sales and marketing group) may lead to the creation of a project. However, in its original form, this document reflects only the *desires* of the person who wrote it. It doesn't reflect an assessment of whether meeting the request is possible or in the organization's best interest, nor is it a commitment to meet the request.
- ✓ **Business requirements document:** A description of the business needs that a requested product, service, or system must address.
- ✓ **Technical requirements, specifications document, or product requirements document:** A description of the characteristics that the products and services produced must have.
- ✓ **Project request:** A written request for a project by a group within the organization. The project request indicates a desire for a project rather than a mutual agreement and commitment to perform it.
- ✓ **Statement of work:** A narrative description of products, services, or results to be supplied by a project.
- ✓ **Project profile:** A document that highlights the key information about a project (sometimes also called a *project summary* or a *project abstract*).
- ✓ **Project charter:** A document issued by upper management that formally establishes a project and authorizes the project manager to use organizational resources to perform project activities.

- ✓ **Work order:** A written description of work that people or groups within your organization will perform in support of your project. The signed work order focuses on work performance rather than overall project outcomes.
- ✓ **Contract:** A legal agreement for providing specified goods or services.

Making a positive first impression: The project title

To accomplish a successful project, a group of focused and motivated people must effectively and efficiently work together to produce an agreed-upon set of desired results. From the beginning of the project, these people must have all the information they need to perform their assigned tasks, as well as the motivation and commitment to overcome any challenges they may encounter as they proceed with their project work. One of the first items you can use to develop these essential information-sharing and commitment-building processes is your project's title.

Although one important use of the project title is to serve as an identifier for project information and materials, if written well, the title can also serve to

- ✓ Announce your project's existence
- ✓ Reveal what the project is about
- ✓ Stimulate curiosity and interest in the project
- ✓ Evoke positive feelings about the project

Of course, for the title to accomplish these goals, the following must happen:

- ✓ People must read the title.
- ✓ The title must include information about the project's intended results.
- ✓ People must be able to relate to it.
- ✓ People must remember it.

You can help ensure that your title meets all these requirements by adhering to the following guidelines when writing it:

- ✓ Know your audience — their interests, knowledge, and communication preferences.
- ✓ Keep it to one sentence.
- ✓ Make it reader-friendly by printing it in a sufficiently large font in a color that contrasts effectively with its background.
- ✓ Make it a mini-abstract of your project by stating the main intended results.
- ✓ Include the most important words first.
- ✓ Triple-check that all information is accurate.
- ✓ Remove unnecessary words (like *a* and *the*) and any redundant information.
- ✓ Minimize your use of technical jargon and acronyms.

A client recently told me she was starting up a new project and asked if I had any suggestions for how she might attract the most qualified people to join her project team. I explained what a big influence the title can have on people's understanding and feelings about a project and how she could go about writing hers most effectively. She responded that she was currently overwhelmed with "important" tasks she had to accomplish to get the project off the ground and she didn't have time to worry about writing the world's "perfect project title." After all, she declared, the people in her organization were highly trained and capable professionals who certainly wouldn't let their feelings toward her project be influenced by something as inconsequential as its official title.

When I ran into this client a few weeks later, I asked her how her new project was progressing. She said she was extremely concerned because none of the people she had hoped would join her project team had even asked what the project was about. I expressed my surprise and asked her what title she had settled on for the project. She looked a bit annoyed but gave me the label from a large stack she had printed up to be placed on project documents and materials. It simply said: "Documentation Team Project"

Is it any wonder that no one was interested in volunteering to join the team that was right away with this

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Looking at the Situation. Explaining the Need for Your Project

Understanding the situation and thought processes that led to your project's creation helps ensure that you and your project successfully meet people's expectations. This section helps you clarify your project's justification and the desired deliverables.

Figuring out why you're doing the project

When you take on a project, *why* you're doing it may seem obvious — because your boss told you to. The real question, however, isn't why you chose to accept the assignment but why the project must be done (by you or anyone else) in the first place.

The following sections help you identify people who may benefit from your project so you can then determine how their expectations and needs help justify the project.