



Scope Management: From Vision to WBS





CONTENTS

- ▶▶ 01 Setting the Scope Stage
- ▶▶ 02 From Needs to Requirements
- ▶▶ 03 Crafting the Scope Statement
- ▶▶ 04 Building the Work Breakdown Structure
- ▶▶ 05 Using and Protecting the Baseline
- ▶▶ 06 Closing Insights & Next Steps





01

Setting the Scope Stage



Taming the Chaos: Defining the Box

Authorization vs. Definition

Having a project charter is essential, but it's just the beginning. To build effectively, we need to define the exact boundaries of our work. This is where scope management comes into play, turning high-level visions into actionable plans.

The Importance of Planning

Planning is the heart of project management. It's where we draw the line in the sand, clearly delineating what is included and what is not. This clarity is crucial for keeping the project on track and avoiding costly misunderstandings.

Scope Management as the Foundation

Scope management is the foundation of all project planning activities. By defining the scope, we create a clear roadmap for the project, ensuring that everyone involved understands the goals and boundaries of the work ahead.



Scope Creep: The Silent Killer



Understanding Scope Creep

Scope creep is the gradual expansion of project requirements beyond the original scope. It often happens through small, seemingly harmless changes that, over time, can severely impact the project's budget, schedule, and team morale.

Preventing Scope Creep

The key to preventing scope creep is to define and guard the project boundaries rigorously. By establishing a clear scope statement and adhering to it, project managers can avoid the costly and time-consuming consequences of scope changes.



Two Types of Scope



Project Scope

Project scope encompasses the work required to produce the product scope. This includes tasks like testing, obtaining permits, and installations that are necessary to deliver the final product.

Product Scope

Product scope refers to the features and functions of the final deliverable. It includes everything the end-user will see and use, such as software features, building dimensions, or product capabilities.

The Distinction

While both scopes are important, project managers focus primarily on project scope. This is the work that needs to be executed to achieve the product scope, and it forms the basis for project planning and control.

Balancing Both Scopes

Effective project management requires balancing both product and project scopes. By clearly defining and managing both, project teams can ensure that the final deliverable meets customer expectations and is delivered efficiently.

The image features a decorative header with the number '02' in a large, blue, sans-serif font. A thin, light blue swoosh with two small dark blue dots at its ends curves around the bottom of the '0' and the top of the '2'. The background is white, with several light blue, semi-transparent 3D cubes of various sizes scattered across the top half of the page. At the bottom, there is a large, wavy graphic element consisting of two overlapping bands of blue, with the top band being a lighter shade and the bottom band being a darker shade, creating a sense of depth and movement.

02

From Needs to Requirements

Starting the Scope Journey: The Requirements



Collecting Requirements

The first step in defining scope is to collect requirements from stakeholders. This involves gathering raw input through interviews, workshops, and observation. While this initial data can be messy and contradictory, it is essential for understanding what the users truly need.

The Requirements Traceability Matrix

What is an RTM?

The Requirements Traceability Matrix (RTM) is a tool used to organize and track requirements. It links each requirement to its source, ensuring that every need is accounted for and traceable throughout the project lifecycle.

Components of the RTM

The RTM includes columns for Requirement ID, Source, Status, and Test Case. This structure allows project teams to monitor the progress of each requirement and ensure that it is validated and tested.

The Importance of the RTM

The RTM serves as a firewall for accountability. If a requirement is not documented in the RTM, it should not be included in the final scope. This helps prevent scope creep and ensures that only validated needs are addressed.



03

Crafting the Scope Statement

The Scope Statement: The Proj

The Role of the Scope Statement

The Scope Statement is the foundational document of the planning phase. It takes the high-level view from the charter and expands it into a detailed description of the project scope, deliverables, and acceptance criteria.

Key Elements

A well-crafted Scope Statement includes a clear project scope description, a comprehensive list of deliverables, and specific acceptance criteria. These elements ensure that everyone involved understands the project's objectives and boundaries.

Acceptance Criteria: The Promise



Importance of Specificity

To be effective, acceptance criteria must be specific, measurable, and agreed upon by all stakeholders. Vague criteria can lead to disputes and delays, making it crucial to define them clearly from the outset.

● Defining Acceptance Criteria

Acceptance criteria are the conditions that must be met before the customer formally accepts the deliverable. They define the project's promise to the client and ensure that expectations are clear and measurable.

● Measurable Conditions

Acceptance criteria should be based on measurable conditions. This allows for objective verification and prevents subjective interpretations of whether a deliverable has been completed successfully.

● Preventing End-of-Project Disputes

By defining acceptance criteria upfront, project teams can avoid end-of-project disputes about whether the work meets expectations. This ensures a smoother project closure and a satisfied client.



04

**Building the
Work Breakdown Structure**



The Heart of Scope: The WBS

Understanding the WBS



The Work Breakdown Structure (WBS) is a hierarchical decomposition of the total project scope. It breaks down the project into smaller, manageable components, making it easier to plan, estimate, and control the work.

The WBS Rule: Noun, Not Verb



Deliverable-Oriented Elements

WBS elements should be deliverable-oriented, representing the tangible outcomes of the project rather than the activities involved. This focus on nouns rather than verbs ensures clarity and stability in the project scope.

Avoiding Activity-Based Descriptions

Using nouns instead of verbs in the WBS prevents confusion between scope definition and schedule definition. For example, 'Installed Window' is preferable to 'Install window' as it clearly defines the deliverable.

Benefits of Noun-Based WBS

A noun-based WBS is more stable and assignable to different execution methodologies. It provides a clear picture of what needs to be produced, making it easier to manage and control the project.

Levels of the WBS

Hierarchy of the WBS

The WBS is structured hierarchically, starting with the project at the top level, followed by major deliverables, and decomposing down to work packages. Each level provides a more detailed view of the project scope.

Work Packages

Work packages are the lowest level of the WBS and represent the smallest manageable units of work. They are the basis for estimating cost, duration, and assigning responsibility.



The 100% Rule

Ensuring Completeness

The 100% Rule ensures that the sum of the work at lower levels equals 100% of the work required for the parent element. This rule guarantees that nothing is omitted or duplicated in the project scope.

Collective Representation of

Collectively, all work packages must represent the entire project scope. Anything not included in the WBS is officially outside the project boundaries and requires formal change control to add.

Avoiding Gaps and Overlaps

By adhering to the 100% Rule, project teams can avoid gaps and overlaps in the WBS. This ensures that all necessary work is accounted for and prevents scope creep.

Importance of the 100%

The 100% Rule is crucial for maintaining the integrity of the project scope. It provides a clear and comprehensive view of the work required, making it easier to manage and control the project.

WBS Dictionary: The Rosetta Stone

The Role of the WBS Dictionary

The WBS Dictionary provides detailed descriptions for each work package, including deliverable definitions, acceptance criteria, responsible parties, schedule milestones, and cost accounts. This document eliminates ambiguity and ensures clarity in the WBS.





05

Using and Protecting the Baseline

The WBS: Your Shield and Sword

Defensive Use of the WBS

Once approved, the WBS serves as a shield against unauthorized scope changes. It helps project managers maintain control and prevent scope creep by providing a clear reference for what is included in the project.

Negotiating Trade-Offs

The WBS also acts as a sword, allowing project managers to negotiate trade-offs when new requests arise. By pointing to the WBS, they can ask where the change fits and what must be removed to maintain balance.

Decomposing: The PM's Art



01

Collaborative Decomposition

Decomposing the project scope into manageable work packages is a collaborative effort. Involving the team ensures that the WBS is accurate, realistic, and supported by those who will execute the work.

02

Building Buy-In

Participatory decomposition builds buy-in and ownership among team members. When they are involved in defining the work packages, they are more likely to commit to the project and deliver high-quality results.

03

Accurate Estimation

Collaborative decomposition also leads to more accurate estimates. Team members who will perform the work can provide valuable insights into the effort and resources required for each work package.

The Scope Baseline

01

Creating the Scope Baseline

The Scope Baseline is formed by integrating the Scope Statement, WBS, and WBS Dictionary. Once approved, it becomes the official project scope, providing a stable reference for all project activities.

02

Formal Change Control

Any change to the Scope Baseline must go through a formal change control process. This ensures that all impacts on schedule, cost, quality, and risk are carefully evaluated before acceptance.

03

Maintaining Integrity

The Scope Baseline helps maintain the integrity of the project scope. It provides a clear and consistent reference for all stakeholders, ensuring that everyone is aligned and working towards the same goals.

04

Importance of the Scope Baseline

The Scope Baseline is crucial for project success. It provides a stable foundation for planning, execution, and control, ensuring that the project stays on track and meets its objectives.

Guarding the Gate: Validating Scope



Validating Scope

Validating scope is a critical process where the customer inspects completed deliverables against acceptance criteria and formally signs off. This ensures that the project meets expectations and prevents disputes at closure.



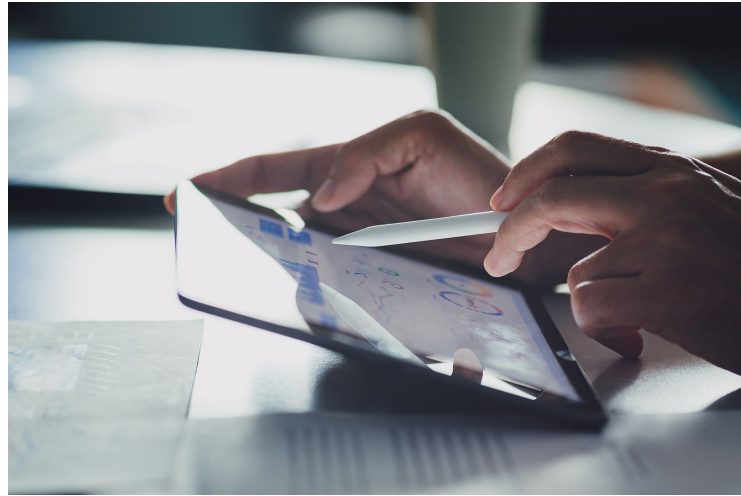
06

Closing Insights & Next Steps

Lessons from the Over-Engineer

Avoiding Over-Engineering

Over-decomposition of the WBS can lead to micromanagement and unnecessary complexity. It is important to find the right balance to ensure efficient project management.



Finding the Sweet Spot

The sweet spot in WBS decomposition is the lowest level at which realistic cost and duration estimates can be made. This ensures that the project is manageable without becoming overly detailed.



Balancing Depth and Clarity

Balancing the depth of the WBS with clarity and manageability is crucial. Too much detail can lead to inefficiencies, while too little can result in inaccurate estimates and scope issues.



Next Steps: Time and Cost

Moving to Schedule and Cost Management

With the scope baseline established, the next steps in planning are schedule and cost management. The WBS forms the foundation for estimating time and cost, ensuring that the project is executed efficiently.



Building on a Solid Foundation

A well-defined scope provides a solid foundation for the rest of the project. By accurately estimating time and cost based on the WBS, project teams can deliver projects on schedule and within budget.



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