

Writing a Scope Statement

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Introduction - Where to Begin

A [scope statement](#) is one of the most critical pieces of a project, and writing one can be a difficult task for a [project manager](#) – no matter what type of [project management methodology](#) is being used. But, an effectively written scope statement can help the rest of the project flow along with minimal problems. Lets take a look at how to write a good scope statement, its necessary components, and the pitfalls to avoid during its creation.

The first step on writing a scope statement is filling in the project name, project charter, and a listing of the project owner, sponsors, and stakeholders. Next, A project justification will need to be identified, as well as project requirements, milestones, and deliverables. Any non-goals - items that fall outside of the scope of the project - need to be identified here. And finally, cost estimates need to be provided within the scope statement. This information may be readily available or it may need to be compiled from various sources, but the scope statement is where it needs to be documented all together. This can be a cumbersome task, but it is a necessary one. As the project progresses, everyone involved knows where they can look should a question arise.

A scope statement is just one of many [free project management forms and templates available for download at Bright Hub](#).

Clear and Concise is the Rule



A scope statement needs to be very clear and concise, and the project name is a good place to start. An effective project name reads something like 'Create a Marketing Plan For Increasing Sales of Widget X in Chicago'. This is much better than 'Marketing Plan Project', which is definitely concise but by no means clear. The aim of the project name is to document the project so that everyone involved is aware of what is expected during the life of the project. A good project name also helps provide a vision of where the project is headed. You can [download](#) an example of a scope statement by clicking [here](#).

A [project charter](#) needs to be drafted next. A charter is usually used for three different reasons:

- Authorizing the project
- Providing a high level overview
- Identifying the main stakeholders

The charter often includes the name of the project owner as well as project sponsors. It also identifies objectives or goals, and constraints on resources or time. Finally, the charter is used as a focal point throughout the life of the project, which can be especially useful during [change control](#) meetings for minimizing scope creep. Scope creep is a phenomenon where the scope of a project gradually increases over time.

The scope statement needs to identify the reason for the project. This is often called the project justification. It is usually a statement or two identifying why the project is being created. It's important to have the project justification identified because this helps to give overall direction to the project as well as emphasizing the final goal. The project justification should be clear and precise manner so that it identifies a quantifiable measure of success for the end of the project. An effective justification might read like the following:

This project is to create a successful [marketing plan](#) for the month of August 2008, in order to increase sales of Widget X by 15% in the Chicago metropolitan area. This is a good example of an effective justification because it is quantifiable and qualitative. Distinct boundaries are set as to what is the expected result of the project so there is no ambiguity.

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Requirements, Deliverables and Non-Goals

The next section in the scope statement should list the requirements of the project. The requirements are objectives that must be met during the project, and often they include significant milestones or goals. The objectives need to be quantifiable and identified clearly. Any milestones or goals need to be also clearly identified, as well as any non-goals. Non-goals are items that are specifically not going to be addressed by the project, which helps to [eliminate the scope creep](#). By clearly identifying these as non-goals, the scope cannot include them later on without going through a change management process. Ultimately, many [project managers](#) track their milestones, goals, and/or deliverables using a [Work Breakdown Structure](#).

The deliverables for a project need to be clearly identified within a scope statement. If necessary, deliverables need to be tied to specific milestones in the project schedule. The deliverables also need to be agreed upon by the major stakeholders as well as the project owner. Deliverables may include any training necessary for personnel at the culmination

of the project. Or deliverables may be a final product to be provided to the stakeholders. No matter what makes up a project's deliverables, specific details regarding them is the golden rule. The more clearly the deliverables are identified and specified, the less chance there will be for scope creep to occur later on.

Cost estimates for the project should also be included in the scope statement. This is an essential process of project planning, so the cost estimates should be as accurate as possible. If the cost estimates are too low, the project will go over budget - sometimes significantly so. If the cost estimates are too high, resources that are allocated to the project - whether they are money, equipment or people - are unavailable for other projects and could negatively affect them. So the more on track the cost estimates are, the more efficient and successful the project will be. This can be a difficult task for the [project manager](#) to do, but effective cost management is a critical success factor for projects.

Finalization and Acceptance

The last significant section of a [scope statement](#) is the formal acceptance signatures. Once the project manager has compiled all of the documentation into a concise and clear statement, all of the major stakeholders as well as the project owner need to sign off on it. This is a very significant step and can be a very useful tool in mitigating scope creep as well. A meeting should be held where everyone can be provided a copy of the scope statement. At that time, any discrepancies can be cleared up or last minute changes can be made. Once everyone signs off on the scope statement, there should be agreement between all parties and the project can begin. By having everyone sign the scope statement, there is very little chance of surprises down the road. And in the event that something does pop up, there is documentation of what was agreed upon initially so that changes can be made if necessary. If anything does change down the road and the scope does need to be increased for some reason, signatures should be obtained from everyone once more.

Exhaustively detailed specifics, clear and concise language throughout, and avoiding ambiguity are the keys to making a scope statement effective and useful. It is also very beneficial to have all of this information documented in one place - even if the process of creating it is enormous. The task of creating a scope statement can encompass a [great deal](#) of time for any project manager, but the rewards usually include more successful projects and minimized scope creep throughout. And this can be a highly desirable benefit, as scope creep is often a significant cause of project failure. So document as much as possible, as clearly as possible, and make sure everyone involved is aware of what is expected. Through clear and concise documentation, a scope statement's usefulness shines all the way to project success.

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