

Managing Scope

**Through Collaboration with the
Business Analyst & Project Manager**

Hosted by Michael Kennedy

Senior Consultant, DevelopMentor

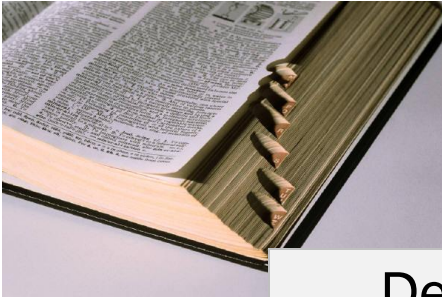
Presented by Dave Bieg

Executive Vice President, DevelopMentor



DEVELOPMENTOR
DEVELOPING PEOPLE WHO DEVELOP SOFTWARE

About DevelopMentor



DevelopMentor provides solutions for all professionals involved in the lifecycle of software projects via our consulting, mentoring & learning services.

We're committed to ...

“Developing People Who Develop Software”



Dave Bieg



- Dave is the Executive Vice President of DevelopMentor, a learning and consulting solutions and service provider to Fortune 1000 corporations.
- He is also on the Board of Directors and COO of the International Institute of Business Analysis (IIBA).
- Dave has over 25 years of experience where he has consulted and facilitated with Fortune 1000 corporations on learning, process and knowledge transfer strategies, and building solutions to achieve their business objectives.
- Dave previously worked for General Electric and Lockheed Martin, where Dave served as a Program Manager as well as a Business Analyst and Systems Engineer.
- Dave holds a MS in Business Administration and Information Systems Management from Johns Hopkins University and is active in the learning & consulting community.



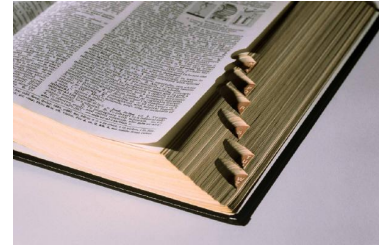
Getting Started

Topics Covered

- What is Project Scope Management?
- Product Scope vs. Project Scope
- Roles & Responsibilities
- Stakeholder Analysis



Definitions of Scope



Scope is:

The sum of the products, services, and results to be provided as a project.

Product scope is:

The features and functions that characterize a product, service, or result.

Project scope is:

The work that must be performed to deliver a product, service, or result with the specified features and functions.

(PMBOK Guide, 3rd Edition, Glossary)



Measuring Success

- **Product Scope**
 - Measured against the product *requirements*
- **Project Scope**
 - Measured against the *project management plan* and the *scope baseline*
 - Scope Statement
 - WBS
 - WBS Dictionary



“ Scope” is Critical to Project Success

When product scope is not well planned and managed...

- ❖ The requirements elicited, analyzed, and documented will be incorrect
- ❖ Requirements will be missed
- ❖ Requested scope changes should have originally been considered “in” scope (and vice versa)
- ❖ Stakeholder expectations & perceptions will be incorrectly set
- ❖ Project time and cost estimates will not be accurate
- ❖ Solutions will not meet the needs of the users



Scope Statement

- **A Scope Statement:**
 - Provides a **documented** basis for making future decisions (a project **contract** among stakeholders)
 - **Clearly states what IS and IS NOT included**
 - Is generally derived from the project charter and information gathered from the sponsor and key stakeholders
 - May be jointly developed by PM & BA to include project and product scope
- **A clear, unambiguous scope statement will save conflict later in the project**
 - Answers the following questions
 - What does the project consist of?
 - Why is the project necessary?
 - What business value will the project provide when it is done?



A Good Scope Statement Includes:

- Project objectives
- Product vision and description
- Project requirements
- Project boundaries
- Project deliverables
- Project acceptance criteria
- Assumptions/constraints
- Initial project organization, risks, schedule milestones, cost estimate
- Configuration Management requirements
- Project specifications
- Approval requirements

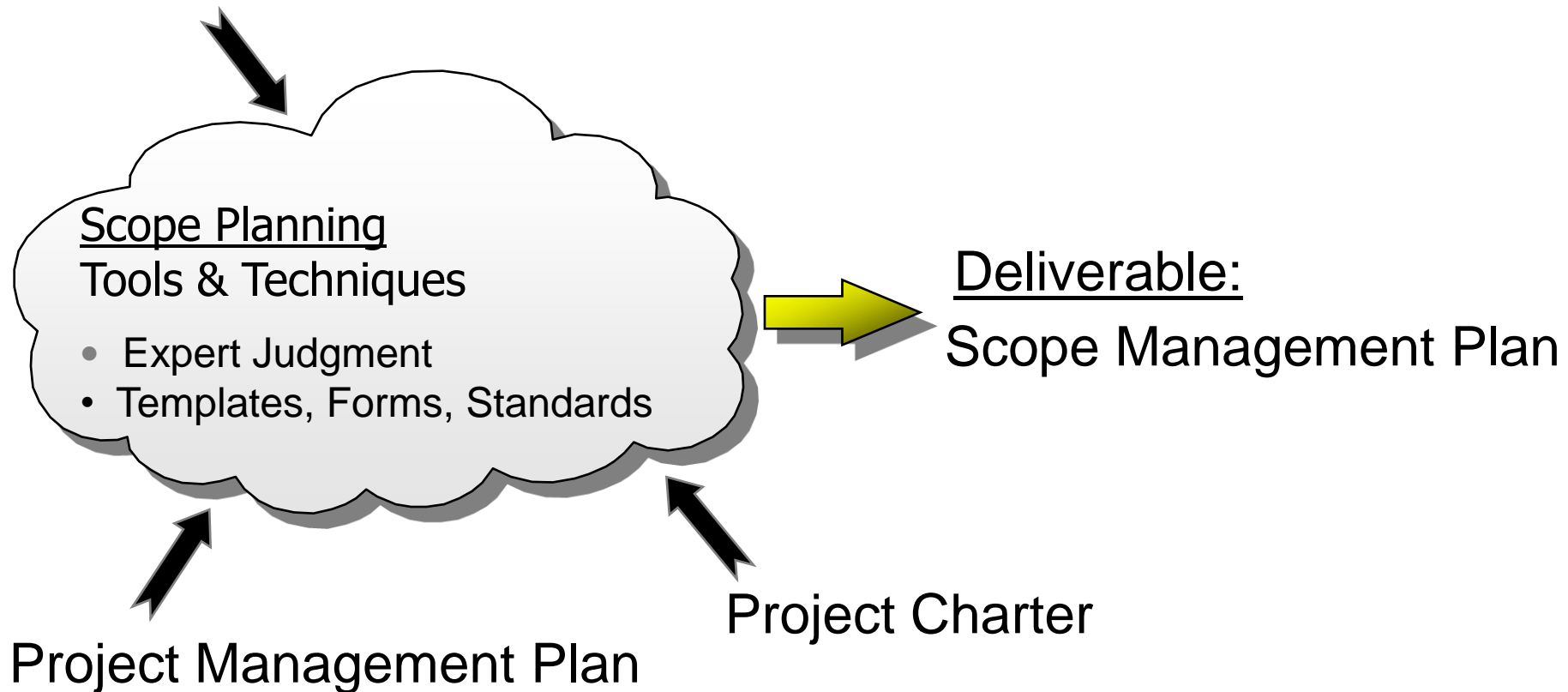
Source: PMBOK® Guide, 3rd edition

Scope Statement Areas that Only Relate to Requirements



Building a Scope Management Plan

Preliminary Scope Statement
and Product Vision and Description



Source: PMBOK Guide, Third Edition

The Scope Management Plan Includes:

- ❖ How the PM and BA will develop, approve & communicate the Scope Statement
- ❖ How requirements deliverables will be created & organized
- ❖ How requirements deliverables will be verified & approved
- ❖ How requirements changes will be processed
 - ❖ Change requests
 - ❖ Identification and classification
 - ❖ Approval and communication
 - ❖ Project integration
- ❖ How changes to the Scope Statement will be processed

Components that Specifically Relate to Product Requirements



The Project Manager

Role Description

The Project Manager is the person assigned by the performing organization to achieve the project objectives. The performing organization is the enterprise whose personnel are most directly involved in doing the work of the project.

A Guide to the PMBOK® Third Edition

Typical Tasks and Activities

- Develop project management plan
- Develop project **scope** management plan and scope statement
- Create Work Breakdown Structure
- Develop activity definitions, sequences, estimates, and durations
- Develop project **schedules**
- Estimate project **costs**, establish a cost baseline and budget
- Plan **quality** standards
- Develop project **staff** management plan
- Develop project **communication** plan
- Plan for project **risk** management



The Business Analyst

Role Description

A Business Analyst works as a liaison among stakeholders to elicit, analyze, communicate, and validate requirements for changes to business processes, policies, and information systems. The BA understands business problems and opportunities in the context of requirements and recommends solutions that enable the organization to achieve its goals.

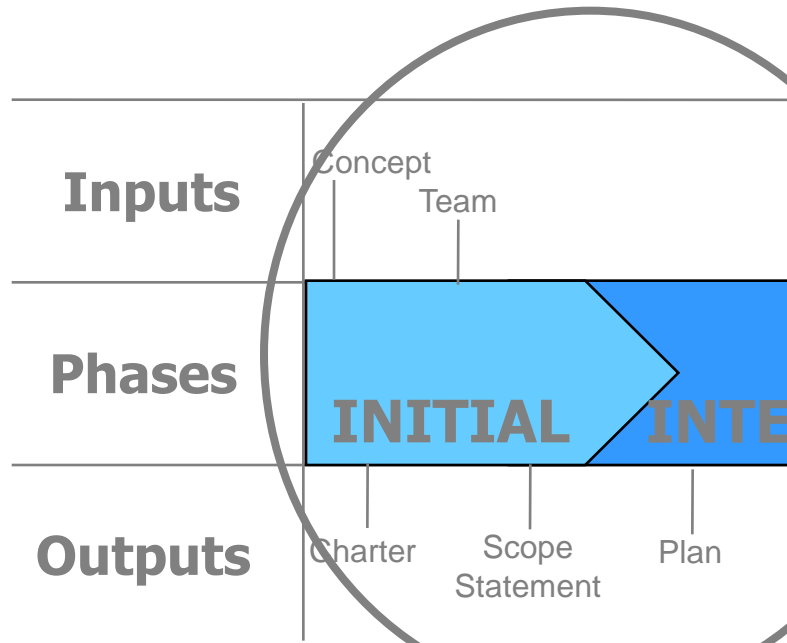
A Guide to the BABOK – release 1.6

Typical Tasks and Activities

- Identify and understand **stakeholders**
- Manage **stakeholder** expectations
- Conduct gathering sessions
- Identify system **features**
- Identify use cases and develop use case descriptions
- Sketch the visual layouts
- Define **functional and non-functional** requirements
- Evaluate and prioritize requirements
- Use requirements management tools
- **Validate** that the solution meets the requirements



Working Harmoniously Throughout the Project

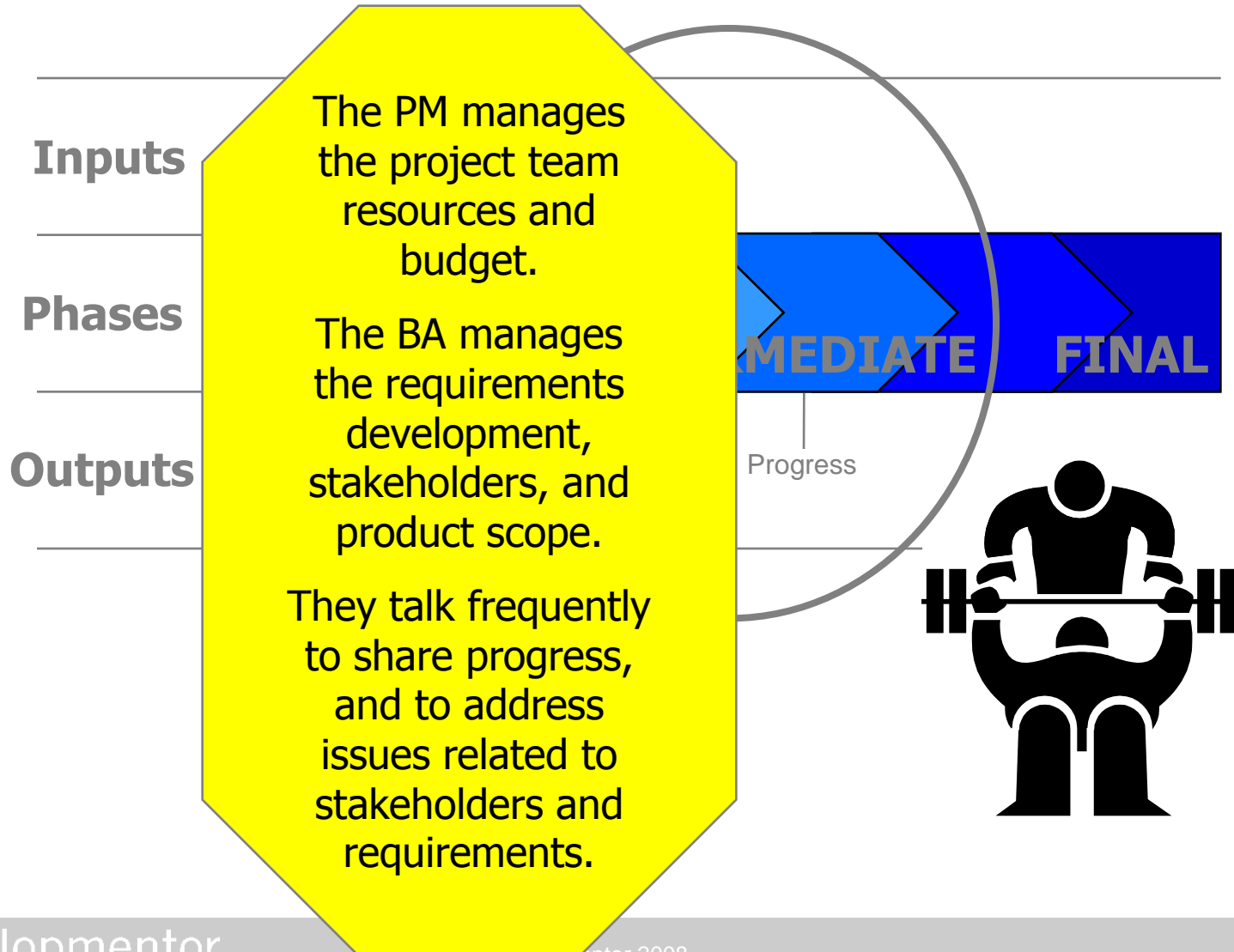


A strong PM & BA team will work closely together to develop a well thought-out plan, and clear, realistic expected outcomes and deliverables.

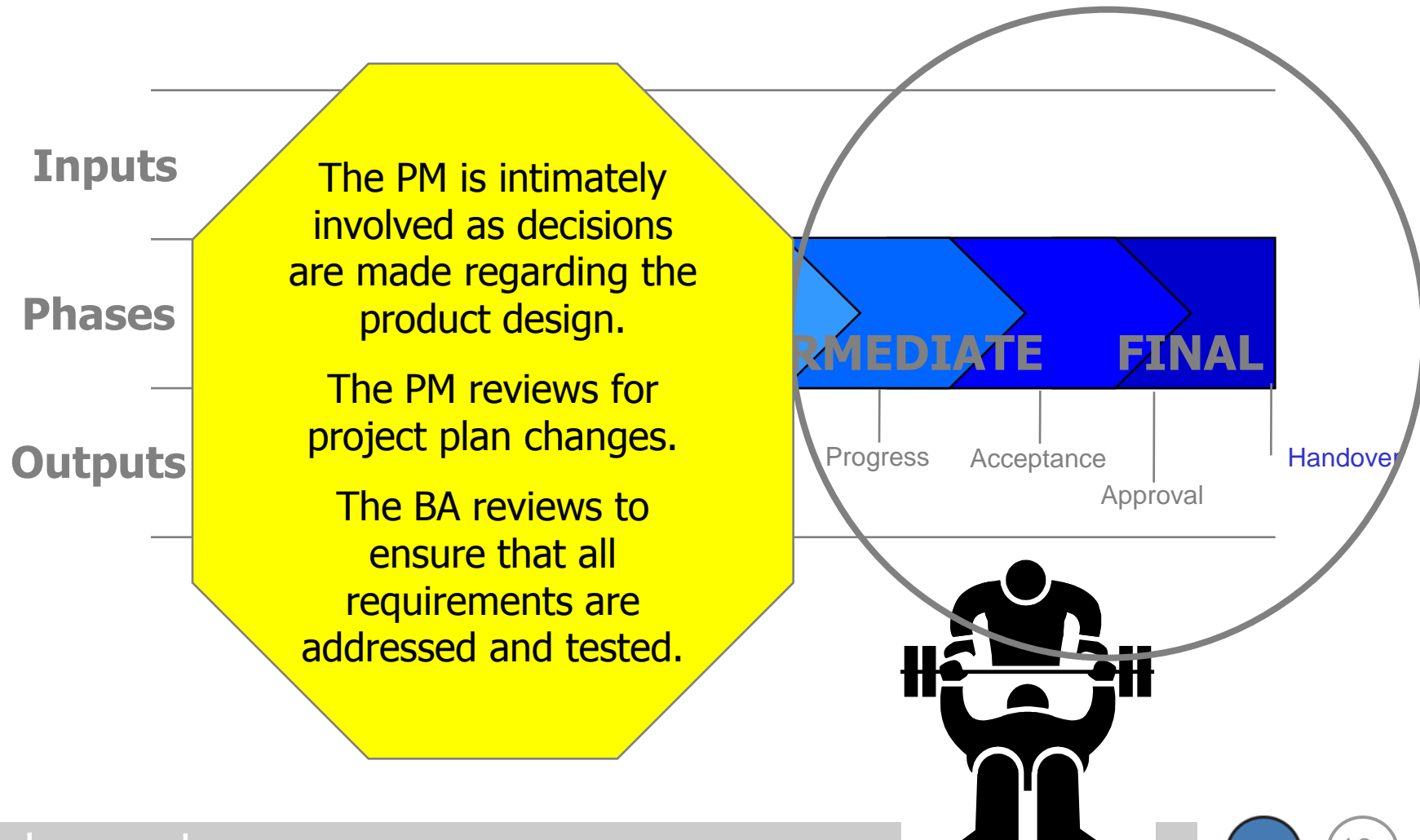
They understand that the ultimate goal is to meet the project objectives.



Working Harmoniously



Working Harmoniously



Roles, Responsibilities, Relationships

Project Manager

- Responsible for communication within the team and good/bad news to Sponsor and Mgmt
- Plans entire project
- Responsible for the Scope Statement deliverable
- Reviews requirements and adjusts plan accordingly
- Ensures that the project is delivered on time and within budget

Business Analyst

- Responsible for communication between Business Areas and IT
- Plans the requirements activities in partnership with the PM
- Ensures the scope is well defined, documented, and communicated
- Elicits, analyzes, and documents product requirements
- Ensures the product is built correctly and according to the requirements



Differentiating the Roles

Based on Project vs. Product Focus

	PM:	BA:
Focus	Project-focused	Product-focused
Leadership	Manages triple constraints	Manages requirements process
Structure	Life-cycle phases	Deliverables
Scope management	Via project plan	Boundary definition and continual assessment
Change Control	Project change control	Product change requests
Specifications	Project Charter	Requirements Documentation
Communication	Project status, milestones, significant events	Impacts, benefits, expected outcomes, requirements changes



Don't Forget the Stakeholders

A Stakeholder is any individual/group who

- Could impact your project
- Is part of your project team
- Could be affected by your project's results

The PM & BA need to

- Get them actively involved in the project
- Understand and communicate their true business needs
- Manage their expectations
- Earn their trust and respect



Summary

- What is Project Scope Management?
- Product Scope vs. Project Scope
- Roles & Responsibilities
- Stakeholder Analysis

*Collaboration between the PM & BA is...
....the Success Factor!*



Business Analysis & Project Management Products & Services

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Contact me

Dave Bieg
Executive Vice President
DevelopMentor

678.296.8389
DBieg@Develop.com

