The Scope Management Plan has the following purposes:

1. To describe the scope of the project;
2. To identify factors that will tend to expand the scope;
3. To describe procedures that will be used to identify scope changes; and
4. To describe the project scope change mechanism.

**Prepared by:** **Date:**

**Project:**

# PROJECT SCOPE STATEMENT

## Project Product

The scope of the project includes the activities listed below.

The scope of the project does *not* include:

The following areas of scope are uncertain or have not been fully defined.

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## Project Justification

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## Project Deliverables

[ ]  Project Charter;

[ ]  Project Plan;

[ ]  Scope Management Plan;

[ ]  Quality Management Plan;

[ ]  Cost Management Plan;

[ ]  Staffing Management Plan;

[ ]  Communications Management Plan;

[ ]  Implementation Plan;

[ ]  Acceptance Test Plan;

[ ]  Risk Management Plan

## Project Objectives

The cost objective of this project is to complete the project for a cost not to exceed

The schedule objective of this project is to complete the project no later than      .

The quality objective of this project is to achieve no more than       customer complaints within the first       months of production.

#

# SCOPE CHANGES

Following are the factors in this project that could lead to changes of scope:

[ ]  The scope is unclear at the start of the project;

[ ]  The customer refuses to be specific on scope or wants to wait for results;

[ ]  There are close business links to other applications;

[ ]  The benefits of the project have not been clearly identified and quantified;

[ ]  There is disagreement among client departments about the goal, purpose, or benefits of the project;

[ ]  The customer or the project team has not committed to the goal of the project; or

[ ]  The project is time and materials instead of fixed cost.

##

## Identifying Scope Changes

Following are the means by which scope changes will be identified during execution of the project:

1. Refine the scope to a greater level of detail (this action needs customer support);
2. Implement a formal scope change request mechanism (described below);
3. Review all results of project meetings or review sessions with the customer to determine if a scope change has been added;
4. Include a roundtable to identify scope changes at all project team meetings;
5. Assess the results of all deliverable review and approval cycles to determine if a scope change has been added;
6. Sensitize the team to the project scope and request that team members be alert to changes of scope; or
7. Sensitize the customer to the project scope and the scope change procedures.

##

## SCOPE CHANGE PROCEDURES

There are two procedures for managing scope changes: one for scope change requests that are initiated by the customer and one for requests that are not explicitly identified as such.

### Customer-Initiated Scope Change

1. When the customer identifies a change of scope, a “Scope Change Request Form” will be completed and delivered to the project manager.
2. The project manager will assign someone from the team to estimate the cost of the change and its impact on the project schedule.
3. The project manager will provide the estimate to the customer along with a date by which a customer decision is required.
4. If the customer approves the change, the project manager will revise the Project Plan to incorporate it. The project manager will also notify the appropriate managers within to ensure that the change is included in the customer billing.
5. If the customer does not approve the change, the change request will be filed and no further work done on it.

### Other Scope Changes

1. When the project manager identifies a requirement or a request that, in his or her opinion, constitutes a change of scope, the customer will be contacted orally to discuss the change.
2. If the customer agrees that the request is a change of scope and is desirable, the procedure under “Customer-Initiated Scope Change” will be followed.
3. If the customer states that the request is not necessary, the project manager will notify the source of the request and ask that it be dropped.
4. If the customer disagrees that the request is a change of scope and states that it is desirable, the project manager will review the project scope statement with the customer in an attempt to reach agreement.
5. If there is no agreement, the project manager will refer the issue to management for resolution. Changes that are accepted into the project will be reflected in revisions to the project plan.