Project Intake
Scope and Business Case Definition as Your Blueprint to Success

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Objectives/outcomes

Participants will:

- gain confidence in their ability to advocate for solid up-front scope
- come away with increased skill in the facilitation and creation of scope
- be better able to connect the highest level project objectives with requirements and delivery of work throughout the project lifecycle, including change management

Agenda

Topic	Timebox
Intro	5 minutes
Quick poll	5 minutes
Advocacy	10 minutes
Preparation, facilitation and documentation	25 minutes
Change management	5 minutes
Q&A	10 minutes

Intro

- Upfront scope and business case definition:
    - What is it?
    - Why does it matter?
    - Who are the stakeholders?
    - When should scope and business case be defined?
    - How much time does it take?
    - Who "owns" creating it?
    - What happens when something changes after the scope was approved?

Quick participant poll:

		1	2	3	4	5
1	*My organization has clear standards for project scope definition*					
2	*I have experience facilitating and documenting project scope*					
3	*I have experience managing projects with well-defined scope*					
4	*I don't generally meet with much resistance when I advocate for scope definition*					
5	*Sponsors and key stakeholders are generally well-aligned around the measurable goals of projects (and what it will take to deliver them) before the work begins*					
6	*Changes which materially impact the original project definition are well-socialized and approved by the sponsor and other stakeholders*					

Thoughts on advocacy

Doing scope and business work up front helps:

- Companies know that they're *spending time and money wisely*

- Sponsors *defend the project against budget and priority changes*

- Project teams *meet the sponsor's and key stakeholders' expectations*

- Project teams *know when they're done*

- Project teams *align and stay focused on the right things*

- Project teams react more nimbly to, and understand and communicate the impact of, scope changes on the original business case

The more important the project is, the more important it is to have a solid, well defined scope and business case.

Preparation

- The power of homework
- Relationship building
- Stakeholder analysis
- (Strategic) Finance Partnership
- Logistics
- First impressions

Building blocks

Components of scope and business case:

Intro and context
Title
Vision and problem statement
Background
High level objectives (aligned to organizational goals)

Definition
Supporting scope elements and success criteria (aligned to high level objectives)
Exclusions ("out of scope" statements)
Constraints
Assumptions
Dependencies

Partnership
Key Stakeholders
Approvals and revision history

Building Block Examples: *Intro and context*

Title	
Vision and problem statement	
Background	
High level objectives (aligned to organizational goals)	

Building block examples: Definition

Supporting scope elements and success criteria (aligned to high level objectives)	In Agile; sometimes known as "epics"
Exclusions ("out of scope" statements)	
Constraints	
Assumptions	
Dependencies	

Building block examples: partnership

Key Stakeholders	
Approvals and revision history	

Elicitation and documentation

- Your friendly neighborhood scribe
- Diagrams and pictures (e.g., value stream maps, context diagrams, current > future state)

Practice exercise: lofty goals

Scenario: your spouse had a brilliant idea; and wants to build a treehouse to surprise and delight the children in your lives before the rainy season hits. There's a *perfect* tree in your back yard!

Your spouse is enthusiastic, but in past, has had a slight tendency to underestimate the amount of time and money it will take to get things done (then gets frustrated and disappointed).

Sometimes projects go unfinished for months at a time or longer. You're a little worried that overspending on the treehouse will cut in to your family's vacation budget.   Your spouse is impatient to begin and wants to go buy the lumber tonight.

LET'S SCOPE IT!   (I'll play the role of the spouse).

Change management

- Agile is agile…
  But scope creep is scope creep
- *Assess the impact*
- *Deformalize the tone*
- *Communicate the "why"*
- *Document the change*

Key takeaways: recap & Q&A