

PROJECT SCOPE STATEMENT

Note: Any work not explicitly included in this *Project Scope Statement* is implicitly excluded from the project.

- Create links to referenced documents (e.g., [Link_To_...](#)) by using *Insert* → *Hyperlink* on your toolbar.
- Note that all documents that are linked to the Scope Statement become part of the Project Scope and require the same degree of management control. Such documents may be maintained in a separate Scope directory along with the Scope Statement.

Project Name:	
Prepared by:	
Date (MM/DD/YYYY):	

Version History (insert rows as needed):		
Version	Date (MM/DD/YYYY)	Comments
1.0		

*<The Scope Statement must account for all of the work of the project. This means that all deliverables and all management responsibilities must be understood and documented. If any work is missing, important activities may be absent from your schedule and your budget may be insufficient to cover all of the cost. As you fill out each section of this document, consider **every** source of work. The guiding principle is:*

Everything required for project success is in scope for the project.

If you discover anything necessary for project success that is not currently included in your project, do whatever is needed to get it included (e.g. negotiate with your Sponsor). If your project depends on deliverables from an external source, make the dependency known and manage it carefully.

Be certain to indicate all of the documents that support this Scope Statement (e.g. WBS). Do not baseline Project Scope until scope is stable. As changes are made in the project, be certain to update the Scope Statement and note the date and source of all changes.

Note: In any instance where there is a discrepancy between the *Project Charter* and the *Project Scope Statement*, the *Scope Statement* is considered authoritative.

1. Executive Summary

1.1 Provide below a brief overview of this project (e.g., Purpose and justification, why it is a good investment). This information should be available in the Project Charter. Also provide a link to the *Project Charter* for reference.

[Link To Project Charter](#)

2. Business Value

Business Value (BV) is the business reason for doing the project. The project can only be an investment success if this BV is realized. BV can be tactical and/or strategic in nature.

2.1 Tactical value: What immediate business need(s) will this project satisfy?

2.2 Strategic value: What strategic impact is expected from this project?

3. Product Scope

Product Scope is everything related to those deliverables that are the product of the project. A preliminary version of this information may be available in the *Project Charter*.

3.1 Description of the Project Solution: Describe the product(s) that will be developed or purchased and delivered to the project customer(s) during this project. If the project will deliver a commercially available product, include links to useful descriptive documents or web content. Examples: New Financial System, or Updated Product Release Process.

3.2 Project Deliverables: List ALL of the high-level product scope deliverables that this project will produce. For example, for an IT project, these could include design documents, the software product, new hardware, a new website, organizational documents (SOPs), installed legacy system training, and a test plan, support structure, and a help desk.

ALTERNATIVE: Provide a Work Breakdown Structure in the next section.

3.3 Work Breakdown Structure (WBS): The WBS is a hierarchical, graphical representation of all of the deliverables of the project, including both product and project scope items. Provide a link to a digital copy of the WBS here, or paste in the graphic.

[Link_To_WBS](#)

3.4 Business Requirements: Business Requirements are the high level features, functions, conditions and capabilities that, when incorporated in project deliverables, will enable the organization to realize the intended Business Value. Business Requirements drive the project. All functional, technical and other requirements must trace back to these Business Requirements.

Provide a link to the document where Business Requirements are maintained (e.g. the Project Requirements Document (PRD)).

Link to PRD:

List Business Requirements here if they are not maintained elsewhere. Provide each Business Requirement with a simple ID and priority (e.g. High, Medium and Low).

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4. Project Scope

Project Scope is all of the work required to manage the project, including work required to oversee building project deliverables as well as work required to manage the project. Project scope deliverables include project planning documents, meetings, change control effort, supervision of the project team, etc.

4.1 Project management approach:

Waterfall Iterative Agile Other:

4.2 Project management deliverables: Indicate which formal written plans will be used in this project.

<input checked="" type="checkbox"/>	Scope Statement	<input type="checkbox"/>	Schedule
<input checked="" type="checkbox"/>	Budget	<input type="checkbox"/>	Risk Management Plan
<input checked="" type="checkbox"/>	Risk Register	<input type="checkbox"/>	Change Control Plan
<input checked="" type="checkbox"/>	Quality Plan	<input type="checkbox"/>	Communication Plan
<input checked="" type="checkbox"/>	Procurement Plan	<input type="checkbox"/>	Resource Management Plan
<input type="checkbox"/>	List other planning documents here:		

4.3 Project techniques: To get a full understanding of the work of the project, it is necessary to understand the techniques that will be used. Indicate this below. Note: These techniques may not apply to all projects.

<input type="checkbox"/>	Earned Value Management	<input type="checkbox"/>	Formal project baselines (e.g. scope, cost, time)
<input type="checkbox"/>	Phase Gate Reviews	<input type="checkbox"/>	Critical Path Method (CPM)
<input type="checkbox"/>	Formal Resource Management	<input type="checkbox"/>	Requirements Traceability Matrix (RTM)
<input type="checkbox"/>	Business Process Analysis	<input type="checkbox"/>	Configuration Management
<input type="checkbox"/>	Structured testing	<input type="checkbox"/>	Automated testing
<input type="checkbox"/>	Transition Management	<input type="checkbox"/>	Create post-project support structures
<input type="checkbox"/>	List other techniques here		

4.4 Staff management deliverables: Includes team meetings, staff reviews, etc.

4.5 Other Administrative deliverables: Includes project reporting (e.g. updates to Project Management Information System), Quality Audits, Safety actions, Environmental responsibilities, etc.

5. Other Relevant Scope Information

All of the following factors can add to the work of the project. Describe all that apply.

5.1 Project management deliverables: Includes additional project management artifacts such as meeting minutes, change requests, status reports, etc.

5.2 External factors: These can include organizational, legal, regulatory, union or other requirements that add to the work of the project.

5.3 Project Completion Criteria: What work must be finished in order for the project to be considered complete?

5.4 External Dependencies: Who outside the project team will you depend on for successful completion of this project? This could include, for example, a vendor, stakeholders, management figures, etc.

5.5 Project Dependencies: Does this project depend on deliverables from any other project? Will it deliver deliverables to other projects?

5.6 Assumptions: List anything that is assumed to be true for planning purposes but which may not be true.

5.7 Constraints: List all factors that limit the decisions that the Project Manager may make, e.g. fixed project completion date.

5.8 Additional Information: Provide any additional information that would help project stakeholders understand the Scope of this project.

6. Out of Scope

6.1 List here any item that anyone might think is in scope but, in fact, is not.

7. Acceptance Criteria

Define the acceptance criteria of project and project management deliverables. Note: Acceptance is part of Quality. If you have a **Quality Plan**, document Acceptance Criteria there and provide a link. If not, enter it in the space below.

Link to Quality Plan (if Acceptance Criteria are maintained there)

7.1 List project phases and exit criteria for each. (or provide a hyperlink to the Phase Exit Plan document)

7.2 List major project milestones and acceptance criteria for each

Milestone	Acceptance criteria
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7.3 List all project management planning documents that require signed approval and indicate who must approve. (Add rows as needed.)

Project Management Document	Person who will sign approval
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7. Acceptance Criteria

7.1 Describe how project acceptance will be accomplished

- Will the project have documented Acceptance Criteria? If not, explain.
- Who will write the Acceptance Criteria?
- Is formal Acceptance Testing planned?
- Who will develop the tests?
- Who will carry out the testing?
- Who will sign off on Acceptance?

8. Project Scope Statement Approval / Signatures

Project Name:			
Project Manager:			
<p><i>The purpose of this document is to provide a vehicle for documenting the initial planning efforts for the project. It is used to reach a satisfactory level of mutual agreement among the Project Manager, Project Sponsors and Owners with respect to the objectives and scope of the project before significant resources are committed and expenses incurred.</i></p>			
<p><i>I have reviewed the information contained in this Project Scope Statement and agree:</i></p>			
Name	Role	Signature	Date (MM/DD/YYYY)

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Scope Statement document.