[Project Name] – Scope Statement

Document Information

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| **Document Title** |  |
| **Business Sponsor** | The person who has final authority regarding the project scope and budget. |
| **Prepared By** | This will likely be you! |
| **Stakeholders** | List all contributors, with titles. Alternatively, refer to a RACI matrix. |
| **Version** |  |
| **Status** |  |
| **Date** |  |

# Project Overview

*2-3 sentence description of this project. Include the primary business driver and a summary of the scope.*

For example: “We want to support the efficiency of our claim agents and reduce the number of follow-up calls by home owners and contractors to check on the status of their claims and repairs. This project involves building a mobile application that will support all aspects of the onsite claims process, integrate with our customer service software, and provide online to home owners and contractors so they can view the status of all aspects of their claim and upload supporting documentation.”

# Expected Benefits

Insert a list of the 2-5 inter-related business goals or objectives that will be the focus of the initiative. Be sure these are high-level outcomes desired by the business, and not solutions. Consider what will be possible once a solution is implemented, how you will measure the effectiveness of the solution, and why the solution is important to the business.

For example, a specific change effort may have an objective of increasing the number of new customers by 10% by making the sales process more efficient and enabling each salesperson to close more sales.

In this case, the business objectives could be:

* Increase the number of new customers each month by 10%, compared to the previous year’s baselines.
* Reduce the number of hours required by a salesperson to close a new customer by 10 hours.

# Capabilities

Identify the capabilities of the solution to achieve the desired business objectives. Solution options can include business processes and improvements, business functions, software solutions, technologies to be changed or replaced, system integrations, organizations/organizational units, and informational assets.

Capabilities are often best organized in sub-groups. When working on software-related initiatives, it’s common to focus on the software capabilities. Be sure to consider the business functions, processes, and information as well.

## Subgroup A Name

|  |  |
| --- | --- |
| ID | Capability |
| A1 |  |
| A2 |  |
| … |  |
|  |  |

## Subgroup B Name

|  |  |
| --- | --- |
| ID | Capability |
| B1 |  |
| B2 |  |
| … |  |
|  |  |

# Assumptions

List any items you believe to be true but have not explicitly verified. For example, you might assume that a third-party vendor will not release a new version of an interdependent system before this project is delivered.

# Constraints

List any known constraints on the solution approach, such as the budget, timeline, resources, regulatory requirements, or existing systems, platforms, functions that must be part of the solution. For example, the initiative may be limited to a certain team’s availability within 3 calendar months and need to be built using the capabilities of an existing COTS the organization has already licensed.

# Out of Scope

List of capabilities that are explicitly NOT in scope.

# Visual Models

A 1-page system context diagram provides a visual model of the project scope and represents the major roles, processes, and features.

# Open Issues

A list of any issues documented during the scoping process. Closed issues will be accompanied by a detailed resolution. Open issues will have owners from the business team and commitment dates. Upon validating this document, you may choose to transfer any open issues to an actively maintained issues list for the project remove this section or replace it with a reference to the project’s issue list.

Revision History

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| --- | --- | --- | --- | --- |
| V. | Date | Author | Description | Status |
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