

**PMI-CAPM<sup>®</sup>**  
**Certified Associate**  
**Project Manager**

**2**

# 2. Scope

6 Processes

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# 1. Plan Scope Management

Plan how to plan, manage,  
control scope

## Planning



# Plan Scope Management

## Input



- Project Charter
- Project Management Plan
  - Project Life Cycle
  - Development Approach
  - Quality Management Plan
- EEFs
- OPAs

## T&Tools



- ...

## Output



- Scope Management Plan
- Requirements Management Plan  
(part of Project Management Plan)

## 2. Collect Requirements

Identify Stakeholders'  
needs

**Planning**



# Collect Requirements

## Input



- Project Charter
- Project Documents
  - Stakeholder Register
  - Assumption Log
  - Lesson Learned Register
- Agreements
- OPAs

## T&Tools



- Data gathering
  - Brainstorming & Benchmarking
  - Interviews & Focus Group
  - Questionnaire & Surveys
- Data Analysis
- Decision Making
- Interpersonal & Team skills
  - Facilitation & Observation
- Data Representation
  - Affinity Diagram
  - Mind Mapping
- Interpersonal & Team skills

## Output



- Requirements Documentation (+ Acceptance Criteria)
- Requirement Traceability Matrix

# 3. Define Scope

Create detailed description  
of project boundaries

# Planning





# Define Scope

## Input



- Project Charter
- Project Management Plan
  - Scope Management Plan
- Requirement Documentation
- Project Documents
- EEFs
- OPAs

## T&Tools



- Expert judgement
- Product Analysis

## Output



- Project Scope Statement

# 4. Create WBS

Divide total work in smaller work packages



# Planning

# Create WBS

## Input



- Project Management Plan
  - Scope Management Plan
- Project Scope Statement
- Requirements Documentation
- EEFs
- OPAs

## T&Tools



- Decomposition

## Output



- Scope Baseline
  - WBS
  - WBS Dictionary
  - (Project Scope Statement)

# 5. Validate Scope

Formal acceptance of  
project deliverables  
(by customers)

**Monitor  
& Control**



# Validate Scope

## Input



- Verified Deliverables
- Work Performance Data
- Project Management Plan
- Project Documents

## T&Tools



- Inspection

## Output



- Accepted Deliverables
- Change Requests

# 6. Control Scope

Monitoring project scope  
(& changes)  
VS Scope Baseline

**Monitor  
& Control**



# Control Scope

## Input



- Project Management Plan
  - Scope Baseline
- Project Documents
  - Requirement Documentation
  - Requirement Traceability Matrix

## T&Tools



- Data Analysis
  - Variance
  - Trend Analysis

## Output



- Work Performance Informations
- Change Requests
- Project Management Plan updates
- Project Documents updates

# What is included in Requirements documentation?

Requirements documentation contains important information about project requirements (considered during planning for procurements and requirements with contractual and legal implications).

## What's included

- Health
- Safety
- Security
- Performance
- Environmental
- Insurance
- Intellectual property rights
- Equal employment opportunity
- Licenses
- Permits



# What is Requirements Traceability Matrix?

What's included

	RequirementGroup1#			RequirementGroup2#		
Objectives	Req1#	Req2#	Req3#	Req4#	Req5#	..
Ob1#	x		x		x	
Ob2#		x		x	x	
Ob3#		x			x	
Ob4#		x		x		
Ob5#	x			x		
Ob6#						
..						

Requirements Traceability Matrix **links requirements to objectives** and other requirements.

Requirements attributes (**id #, source, status**) also need to be documented.

# What is Project Scope Statement?

Project Scope Statement defines **what is in** and **what is out of scope**.

## What's included

- Product scope
- Project scope + description
- Deliverables of the project
- Acceptance criteria
- What is not part of the project
- Assumptions and constraints

# What is **WBS**?

WBS **shows all the scope of a project**, broken down into manageable deliverables (work packages).

WBS is **deliverables-oriented**.

WBS is **created by PM** (together with Team and Stakeholders).

Deliverables **not included in the WBS** are **not part of the project**.

## What's included

- Project title
- Development life cycle
- Deliverables
- Work packages

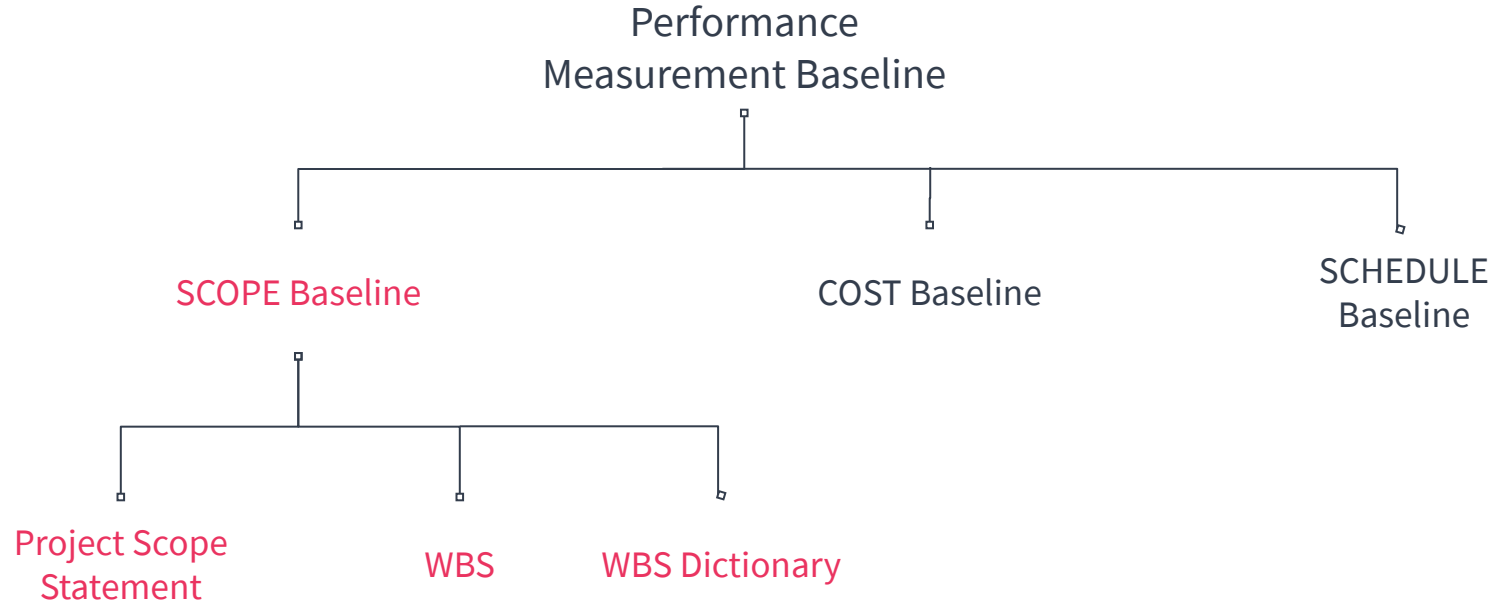
# What is **WBS Dictionary**?

What's included

WBS Dictionary			
Control Account ID#	Work Package Name / Number	Date of Update	Responsible Org/Individual
Work Package Deliverable Description			
Work Involved to Produce Deliverable			
Acceptance Criteria			
Assumptions & Constraints			
Quality Metrics			
Technical Source Document			
Risks			
Resources Assigned			
Duration			
Schedule Milestones			
Cost			
Due Date			
Interdependencies (Before this work package____ / After this work package____ )			
Approved By (Project Manager____ / Date____ )			

WBS Dictionary provides a description of the work to be done **for each work package.**

# What's included in **Scope Baseline**?



# What is the difference between... ?

## Verified Deliverables

VS

## Accepted Deliverables

Output of deliverables

⇒ Control Quality

⇒ Verified by internal processes

Output of Validate Scope

⇒ Only deliverables verified  
can enter this step!

⇒ Verified (and accepted) by  
the customer



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THANK YOU

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