PROJECT SCOPE MANAGEMENT PLAN TEMPLATE

This template guides you through each stage of preparing an effective scope management plan that ensures success. With this plan you clearly state the exact work that need to be done and schedules to attain the project objective. There are six processes to scope management within the PMBOK® framework.

- 5.1 Plan scope management
- 5.2 Collect requirements
- 5.3 Define scope
- 5.4 Create WBS (Work Breakdown Structure)
- 5.5 Validate scope
- 5.6 Control Scope

A critical part of project management is the ability to manage the project scope from its inception through to sign-off. This template is designed to enable you to produce an effective Scope Management plan. All essential details and descriptions of what the exact nature of the project is are contained in this management plan. It also defines how end user requirements will be translated into deliverables and their associated workable chunks.

This plan ensures that everyone has a common and thorough understanding of the projects overall objective and how this need will be met. It defines the role and responsibility of every individual linked to the project and the communication that must occur between different parties to ensure it success.

FRONT COVER	**DESCRIPTION:** this page details the typical items found on the cover of scope management plan. Amend its contents to reflect the needs of your specific project and organization's culture.
Displays a top-level summary of essential information relating to the Scope Management Plan.	- Project Manager is listed as its author along with their contact details. In some organizations the Project Sponsor may also be co-author f this plan - Project Name that this plan relates to. - Version of Scope Management Plan - Version history will be shown in relevant appendix. - Approval: - Lists the names and job titles of each person who as given approval and sign-off of this plan. - The date and version they have approved accompany their signature. - Circulation List of who (name, location & organization) has received stated version.

Project Working Title:	Project Description:		Version: Date:
Project Sponsor:	Contact tel: email:	Plan Author:	Contact tel: email:	Organization:

SCOPE MANAGEMENT PLAN APPROVAL			
Printed Name & Job Title	**Project Role**	**Signature**	**Date Approved**
	Project Sponsor		

CIRCULATED TO:

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INTRODUCTION – this section of the scope management plan describes the process that will be undertaken to ensure that only the work required to deliver the service or product is completed and any other work is excluded from the project's scope. It describes how the scope of the project will be defined, developed and validated along with the roles and responsibilities of individuals as they relate to scope management. It also describes the process that will be used to control and manage the scope during its lifespan, so that project creep can be avoided.

SCOPE MANAGEMENT APPROACH – this section summarizes the scope management approach that will be wised for the project. It defines who has overall responsible and has authority for this area as well as what documents and measures will firstly define and then validate the scope. It describes the entire change request process.

ROLES & RESPONSIBILITIES – this section of the plan lists the names, contact details and responsibilities of anyone who is involved in scope management. This will include individual stakeholders, team members, sponsor and project manager. It will state who is responsible for and has the authority to accept the scope's project deliverables and the person or persons who have the overall authority to accept the final project deliverable.

SCOPE MANAGEMENT ROLE	LEVEL OF AUTHORITY	NAME & ORGANIZATION	CONTACT DETAILS	PROJECT ROLE

SCOPE DEFINITION – is the area of the plan that describes how the project deliverables will be defined so that each one has a detailed description. This section needs the existence of the Requirements Document, Requirements Management Plan and a Requirements Traceability Matrix so that they can be referred to in the definition explanation. It will also refer to any other documents that it uses as part of this process i.e. Project charter, scope statement etc. Finally this section descries the tools and techniques that will be used in the scope definition process.

Tools & Techniques

PROJECT SCOPE STATEMENT –in this section the work required for each of the project deliverables is described in detail. There are five subheadings shown below that must be included in a scope statement.

Product Scope Description

Product Acceptance Criteria

Project Deliverables

Project Exclusions

Project Constraints

Project Assumptions

WORK BREAKDOWN STRUCTURE (WBS) – in this section the WBS and its associated dictionary define each of the project deliverables, its associated work packages and how each of these components will be managed throughout the project duration. It outlines how the scope has been divided up or decomposed into manageable chunks.

WBS Id	Level	Name of Element	Work Description	Budget $	Resources	Deliverable

SCOPE VALIDATION – describes how each of the project deliverables will be validated or verified against the initial scope baseline. It describes how each of these deliverables will be formally signed off and accepted by the 'customer' both during the project lifecycle and the single end deliverable that defines the end of the project.

SCOPE CONTROL – this is a vital section of this management plan as it describes the way project creep will be prevented and changes to the scope baseline assessed, evaluated, approved and integrated into a new version of the project scope. It also outlines how progress will be monitored and the status reporting it requires as well as how any approved changes will be communicated within the project team, third-parties and to relevant stakeholders. If an organization uses a Change Control Board (CCB) as part of the control process this will be explained here.

APPENDIX A – VERSION HISTORY

This appendix records the version history of this plan. For each new and approved version the reasoning behind its creation are described below

Version Number	Name of Implementation Author	Date Revised	Approved by	Date Approved	Reasoning behind new version
1.0					

APPENDIX B – GLOSSARY OF PROJECT TERMS

Each project uses standard acronyms and develops their own for the ease of communication. It is important to record them in this plan to ensure clarity of description and terminology is consistent in every communication.

Acronym / Term	Standard or Project Definition
PMO CCB	Project Management Office Change Control Board

APPENDIX C – DOCUMENTATION REFERENCES		
Any professionally managed project has extensive documentation the purpose of this appendix is to record which documents (plus the version used, if applicable) have been used in the production of and conjunction with of the communications management plan.		
ISBN / Reference / Version	**Document**	**Author**
	Requirements Document	
	Requirements Management Plan	
	Requirements Traceability Matrix	

APPENDIX D – REPORTING REQUIREMENTS					
All professionally managed projects require extensive and detailed reporting structure this appendix can be used to record which reports are required as part of this management plan.					
Report ID	Author/Owner	Report Name	Purpose of & Description	Format	Frequency