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Project Scope Lite – Tier 1
Rev. 1.2 November, 2011

Sample - for Evaluation Only

PROJECT SCOPE Lite (for Tier 1 (“Small”) projects only)

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

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 should be maintained in a separate Scope directory along with the Scope Statement.

Project Name:	
Project Manager:	

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

<Even in a small project, the Scope Statement must account for all of the work of the project. This means that all deliverables and all management responsibilities (e.g. project management work) 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.>

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**Project Scope Lite
<Project Name>**

1. Executive Summary

1.1 Project Summary:

Provide below a **brief** overview of this project (e.g., project purpose and justification). This information should be available in the Project Charter.

Provide a link to the Project Charter for reference.

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

1.2 Business Objectives:

What specific Business Value will this project produce (e.g. revenue, cost savings, new capabilities, new market, improved customer relations, etc.)? Business Objectives should be objectively measurable.

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2. Product Scope

For each area below, provide sufficient detail to define this project adequately: 📖

2.1 Product Description (Solution): Describe what this project will produce, e.g. update to Financial System

2.2 Deliverables

In Scope: Provide a link to the **Work Breakdown Structure (WBS)** or embed the graphic here. If the WBS is not yet available, provide a list of project deliverables.

Out of Scope: For clarification, list whatever is not included in this project that a stakeholder might think is included.

2.3 Project Requirements: Project Requirements include Business, Functional, Technical, Performance, and other requirements. Documented requirements are a critical input to a project. Provide a link to the document where Project Requirements are maintained (e.g. the Project Requirements Document (PRD)).

Link to Project Requirements

2.4 External Dependencies: What outside the project team will you depend on for successful completion of this project? Do any projects depend on deliverables from this one? Does this project depend on deliverables from another project?

2.5 Assumptions: Anything you say is true for planning purposes while understanding that they may not be true, e.g. I assume the vendor can deliver within 30 days.

2.6 Constraints: Anything that limits your ability to choose options, e.g. mandated completion date, staffing limitations, etc.

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2. Product Scope

2.7 Additional Information:

Provide any additional information that would help project stakeholders understand the Scope of this project.

3. Project Scope

Describe the Project Management approach briefly in the space below.

3.1 Check [x] PM Approach to be used in this project

Waterfall Iterative Agile Other:

3.2 Check [x] all PM techniques to be used in this project

Risk Mgt Format Baselines Change Control CPW
 Earned Value Transition Mgt Phase Gate Reviews
 Other (describe below)

Describe Other:

3.3 Will the project have formal written plans? Examples: Project Schedule, Budget, Resources. If not, a plan that planning will be done.

3.4 Will the project include procurements? If Yes, list items / services to be procured here:

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4. Project Scope Statement Approval / Signatures

Project Name:

Project Manager:

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 between the Project Manager and the Project Sponsors and Owners with respect to the objectives and scope of the project before significant resources are committed and expenses incurred.

I have reviewed the information contained in this Project Scope Statement and agree:

Name	Role	Signature	Date (MM/DD/YYYY)
	Project Sponsor		
	Project Manager		

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.

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