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**Project Scope Lite**  
Rev. 1.3 May, 2013

**Sample: For Evaluation Only**

## PROJECT SCOPE Lite (for Tier 2\* ("Small") projects only)

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

<b>Project Name:</b>	
<b>Project Manager:</b>	

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

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 key stakeholders with respect to the objectives and scope of the project before significant resources are committed and expenses incurred. 

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.** 

*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.*

 This symbol indicates that inline help is available. Mouse over the symbol to see the text. **Note: In this sample document help text is displayed to the right as Comments**

**Portions of this template are provided for your evaluation  
The entire template is available at [www.cvr-it.com](http://www.cvr-it.com)**

**Comment [ 1]:** 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.

**Comment [ 2]:** 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) or else account for it some other way. If your project depends on deliverables from an external source, make the dependency known and manage it carefully.

\* Project Size is defined in the **Project Sizing** template

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## Project Scope Lite <Project Name>

### 2. Scope Description

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:** Provide a link to the document where **Project Requirements** are recorded OR, for simple deliverables, list them here. 

**2.4 External Dependencies:** List all project dependencies here and consider using a **Commitments Agreement form** to reduce risk. 

**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.

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

**Comment [ 4]:** Even if this is a small project (e.g. short duration, small budget, limited scope), planning should be commensurate with the degree of importance to the organization or risk. Scale the amount of planning to fit the project.

**Comment [ 5]:** A credible WBS can be built in a very short time if you have the appropriate people present during the WBS exercise. A WBS provides greater assurance that the entire scope is understood and is considered to be a fundamental project planning deliverable.

**Comment [ 6]:** Project Requirements include Business, Functional, Technical, Transition and other requirements types. Documented requirements are a critically important element in any project.

**Comment [ 7]:** Who 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?

**Sample: For Evaluation Only**