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Crosswind Success Series:
PMP® Exam Bootcamp Manual

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Tony Johnson, MBA, CAPM, PMP, PgMP, PfMP

10.1. Plan Scope Management (Planning Process Group)

During Plan Scope Management, the scope management plan and the requirements management plan are created.

The scope management plan contributes to the management and definition of the project by defining how the scope of the project will be managed, including the creation of the requirements, scope statement, work breakdown structure (WBS), and WBS dictionary, as well as the validation and control of the project scope.

The requirements management plan is a component of the project management plan that details the evaluation, documentation, and administration of project requirements.
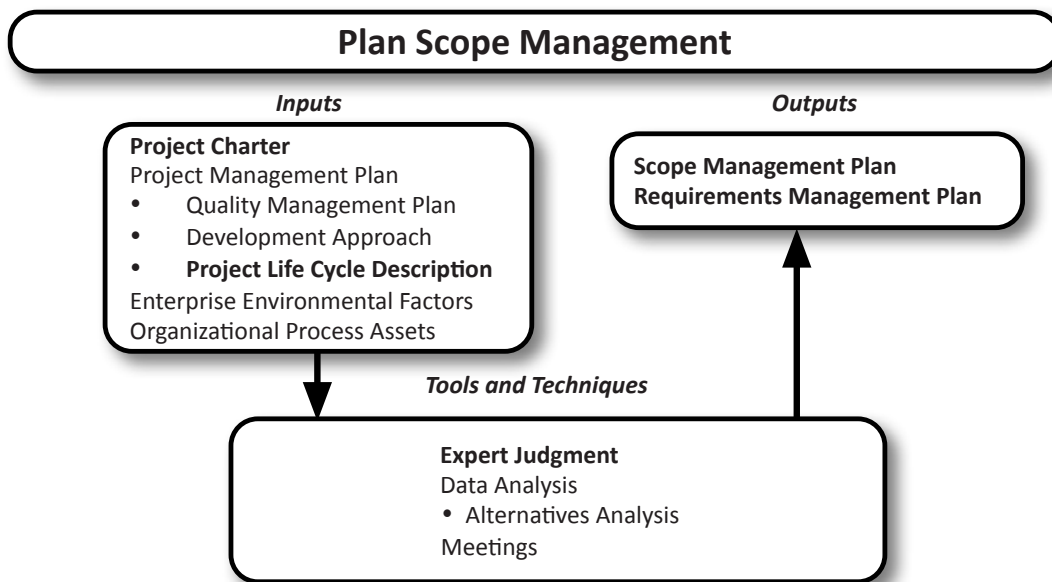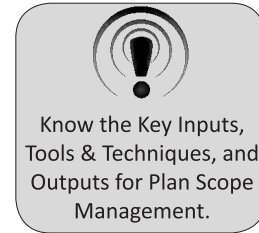
> Know the Key Inputs, Tools & Techniques, and Outputs for Plan Scope Management.

Plan Scope Management

Inputs

Project Charter
Project Management Plan
- Quality Management Plan
- Development Approach
- **Project Life Cycle Description**
Enterprise Environmental Factors
Organizational Process Assets

Tools and Techniques

Expert Judgment
Data Analysis
- Alternatives Analysis
Meetings

Outputs

Scope Management Plan
Requirements Management Plan

Figure 10-2: Plan Scope Management Data Flow Diagram
The source for the above figure is the Project Management Institute, *A Guide to the Project Management Body of Knowledge*, (*PMBOK® Guide*) – Sixth Edition, Project Management Institute Inc., 2017, Figure 5-2, Page 134

Plan Scope Management (Planning)		
Key Inputs	Project Charter	The project charter is the document that provides authorization for the existence of the project and gives the project manager the power to use organizational resources to execute the project. The project charter typically lists the key deliverables, the milestones, and the preliminary roles and responsibilities of the project. Note that the project charter delineates the purpose of the project, high-level project description, requirements, assumptions, and constraints. The project charter is used to plan the scope management processes.

Plan Scope Management (Continued)		
Key Inputs (Cont.)	Project Life Cycle Description	The project life cycle description delineates the phases of the project and which development approach (waterfall, agile, adaptive, iterative, or hybrid) will be utilized.
Key Tools and Techniques	Expert Judgment	Expert judgment is judgment based on expertise acquired in a specific area. It is important to consider expertise related to knowledge of the industry or area of application and experience with previous projects similar to the current project.
Key Outputs	Scope Management Plan	The scope management plan is a component of the project management plan that details the delineation, evolution, monitoring, controlling, and validation of scope. It includes the methods for creating the project scope statement, authorizing and maintaining the WBS, authorizing formal acceptance of deliverables, and controlling change requests related to the scope statement, WBS, and requirements.
	Requirements Management Plan	The requirements management plan is a component of the project management plan that details the evaluation, documentation, and administration of project requirements. It includes the methods for designing, monitoring, and reporting requirement activities and configuration activities; prioritizing requirements; determining requirement metrics; and capturing attributes for the requirement traceability matrix.

Situational Question and Real World Application
Failure to effectively execute the Plan Scope Management process can result in scope creep. Scope creep can occur when the scope is not adequately defined and locked down, since the product owner has carte blanche to request changes regardless of impact to the project schedule, project budget, and/or project resources. The scope management plan is the key document referenced to promote scope containment.

10.1.1. Scope Management Plan

The scope management plan helps the project manager and the team establish the rules for managing scope.

The plan may include the methods that will be used to:

- Create a scope statement
- Create a work breakdown structure
- Validate project deliverables
- Address scope change requests

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10.1.2. Requirements Management Plan

The requirements management plan helps the project manager and team analyze, document, and manage the project requirements.

The plan may include:

- The methods that will be used to manage requirements
- The methods that will be used to create requirements
- The methods that will be used to plan, track, and report requirement activities
- The methods that will be used to perform configuration management activities (notably how to initiate changes to the product, service, or result, how to analyze the impact of the changes, and how to change approval authorization)
- The methods that will be used to prioritize requirements
- The methods that will be used to determine product metrics and usage rationale
- The traceability structure that will be used to show what requirement attributes will be included in the requirement traceability matrix
- The methods that will be used to create the traceability matrix, specifically the requirement attributes that will be included in the matrix and the other project documents to which the requirements will be traced

10.2. Collect Requirements (Planning Process Group)

During Collect Requirements, project requirements are created based on an analysis of project stakeholder needs. The focus should be on appropriately defining the measurable needs of the sponsor, customer, and applicable stakeholders. Those needs, in the form of requirements, feed the WBS and ultimately the quality, schedule, and cost estimates for the project.

Know the Key Inputs, Tools & Techniques, and Outputs for Collect Requirements.

The process begins with an analysis of the project charter and stakeholder register. The business case, regulatory documents, use cases, and lessons learned register might also be referenced.

The main documents created during this process include the **requirements documentation and the requirements traceability matrix.**

The project requirements, at this point, serve as a basis for all planning as they define what the customer needs, and expects, the project result(s) to do.