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Project Scope Control

Submarine Races and the Project PeriSCOPE

Three project managers stood on the dock of Lake Projects-Run-Amok just prior to launching new projects. One of the project managers raised a clenched fist to the sky and snarled, "Only over my dead and mutilated body will there be scope changes to this project!"

The second PM said, "I've listed thousands of technical specifications and they signed off on them, so I won't have any scope changes either."

The third said, "I've written the ultimate scope narrative, 34 smooth-talking pages. They won't change the scope of my project because everybody loves it just the way it is now!"

A veteran of many projects leaned against the jetty; listening to the PMs. The master PM chuckled and then muttered, "There go three PMs certain to have both scope control problems and very dissatisfied bosses/users/clients. In different ways they've each set themselves up for total failure. What these pups don't understand is that scope control isn't preventing any and all changes to the project. It's managing the inevitable changes so that the odds of project success remain high. Most importantly we don't want misguided scope control efforts to cause the user/client/boss to see the project as not contributing to their business success. But the real irony here is that those three jokers think scope control problems come only from boss/client/user executives. Sure as can be, they'll be dragged under by the other sources of scope problems."

The master PM raised the ancient binoculars and scanned the bay, zooming in on one project steering an erratic, jerky course. Its periscope was aimed at its own wake. "Ahh, a micromanager," the PM said, "nit-picking what the project team did last week and paying no attention to where the project's going." Micromanagers do okay with very small projects and small teams but that "managing all the details" style makes it almost impossible for them to manage scope. The micromanagers might as well hang a pair of bloomers over the periscope for the all the good it does them. No wonder they run aground so often. On top of scope problems, mutiny is likely, particularly if the project team members feel capable of doing some of the thinking for themselves.

Going Down With All Hands On-board

As the master PM scanned the bay, project submarines churned through the water with their periscopes breaking the surface. The master PM watched as one sub sank lower and lower in the water. The periscope spun frantically in circles as that



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PM scanned in all directions for the problem. Finally, its periscope still whirling like a blender, the project vanished beneath the waves. The master PM knew what had happened on-board. Well-meaning project team members considered their assignments and said, "Well, as long as we're changing that, we might as well, change the..." The project took on water and then sank from the scope creep of its own project team members. If there is no scope control on individual assignments, project team members can be a major source of scope creep. Lack of clarity about their assignments and having to guess about what the PM really wants, causes assignments and work to expand beyond what was intended. Because the PM is unable to specify a precise end-result, the team members, often in self-defense, expand their assignments to cover all the possibilities. Our need for clarity and measurability doesn't end with the project scope; it extends to every assignment in the project. Otherwise, with the best of intentions, the project team can bloat project submarines until they look like sperm whales resting on the bottom.

Depth Charges and Collisions at Sea

Next, the project veteran took a look at the submarine belonging to the PM who was so proud of the long list of technical specifications on which the user/client had signed off. It was already under depth-charge attack from those same users/clients. As each explosion blasted the water to froth, the users/clients screamed, "This project is doing nothing for my business! Damn your specifications! I want improved performance!" Actually, this PM was lucky because he/she knew about the stakeholder's dissatisfaction, subtle as it was. The really nasty situation is when executives stop dealing with the PMs, whom they regard as technical geeks with no understanding or concern about business performance. Prior to walking the plank at sword point, these PMs deal only with interface staff and consultants who speak very slowly as they try and translate business needs into specifications the geek can understand.

Last, the PM with the 34-page hard-hitting scope narrative was also steering a wandering course with the periscope ranging all along the shoreline, aiming at one and then another stakeholder. Each stakeholder was beckoning the project toward his or her section of shoreline. Each of them had found something they liked in the smooth-talking scope narrative. Unfortunately, they each found a different thing to like and each had very different views of what the project would deliver. Now the PM wandered from one ambiguous objective to another, depending on who shouted loudly enough to catch the PM's attention. The veteran PM muttered, "Scope control starts during planning where the PM must specify the business result and surface conflicts between stakeholders about the desired end result. Far better to force them to address these conflicts before setting sail than to debate the differences while we're trying to get work done. Then, the project team must constantly repel boarders as various stakeholders vie for control after it has started."



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The master PM scanned the bay again and grunted. The most insidious form of scope problems was rearing its ugly head. The surface of the bay was filled with project periscopes as well as hundreds of small sailboat projects and several giant cruise ships that consumed vast amounts of resources. As the veteran watched, one of the monster projects crushed the hull of a submarine. The little project sailboats knocked other projects off-course and routinely shanghaied crewmembers who unwisely stuck their heads out a porthole. The master PM sighed, saying, "Lack of portfolio management allows anyone to launch as many projects as they want. The congestion knocks bigger ones off course and affects the scope of the whole flotilla. The yield of this portfolio will be a mere shadow of what it would be if they exercised portfolio level scope control. The sad part of this portfolio scope issue is that even project managers who do a good job controlling scope within their teams and with their boss/user/clients, can still be knocked off course by the horde of little sailboats or an out of control cruise-ship."

The lake was littered with sinking projects of all sizes because the organization had launched more projects than it was capable of delivering. Every project suffered as a result. Resources expended on canceled or sunken projects could have been applied to projects with important strategic yields if the decisions about what projects not to do had been made before launching the bad ones.

Three-level Scope Control

The ancient PM ambled over to another body of water to launch a new project. Here in Project Portfolio Bay, they were accustomed to project success. The bosses/users/clients insisted on concise, measurable business results as the scope definition. Sure, the PMs sweated bullets to learn the business situation and define project success this way and it did require a lot of thinking. But these scope statements were objectively measurable, unambiguous and described strategically relevant business results, not technical functionalities. The process allowed executives to exercise strategic control over the whole portfolio of projects as well as set real priorities and allocate resources to what was most important. These executives had conflicts about the business objectives of projects; but resolved them before work started. PMs weren't part of the conflict, they just fueled the debates by constantly converting vague mission statement mush (to which everyone will agree) into measured business results that specified precisely what projects would and would not yield. All the PMs wanted was an exact location at which to aim their projects.

The organization exercises the second level of scope control at the portfolio level, using scope data to decide which projects should be launched. Even the little sailboat projects had to pass through this scrutiny because while none of them individually consumed many resources, collectively they swallowed significant portions of the enterprise's resources. Before any sailboat was launched, the portfolio manager made the conscious decisions, "Shall we take resources away

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from bigger more strategically significant projects to launch this sailboat project?" They also looked at bunches of the little sailboats and asked, "Could we bundle several of these little boats and make a larger, more efficient project?" The portfolio managers knew that a failure to exercise scope control over everything that was launched made resource allocation and priorities a joke. A project passed these portfolio acceptance processes only if it "fit" into the strategic scope of the portfolio as a whole.

Third, the master PM exercised scope control within the project team by subdividing the measured achievement for the project as a whole into individual assignments for each team member. Rather than detail what they were to do, these assignments specified, in measurable terms, the end result each team member was accountable for achieving. This positioned the team members to be creative and innovative while staying clearly focused on the measured results and work hour budget to which they committed.

The moral of this little story is that scope control needs to be exercised at three levels. The organization needs to specify a protocol so that projects of all sizes play by the same scope control rules. We may have different standards for projects of different scale but every project must be justified by the specific business result its owners commit to delivering. Only then can we ensure that our overall resource allocations are aimed at the correct business targets. Stakeholders sign off on these specific business results so there is no ambiguity on a project's objectives. Last, this measurability and specificity is also built into individual team member assignments so we can control scope at that level as well.

To read more about these processes, visit the Achievement-driven Project Management (AdPM™) methodology and review our just released Managing Complex Projects book and course. As well, you might consider our executive seminar on Enterprise Project Management, which yields project protocols like those discussed in this article.

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