

Writing a Scope of Work



Procurement & Contract Services

Critical to Project Success

Proper scope management is critical to the success of any project, especially in terms of time and money. And one of the first tasks of any project manager and his team is to develop a written scope statement or scope of work (SOW).





This scope statement forms the basis for agreement between customer and supplier.

SOW Qualities

-  Basis for all project related decisions
-  Used to determine whether the project has been completed and calibrate success

Tools & Techniques

Prepare in advance by using the following for your project:

-  Product analysis
-  Benefit/cost analysis
-  Alternatives identification
-  Expert judgement



Planning and Outputs

The written scope statement identifies both the project deliverables and project objectives. It provides a basis for confirming or developing a common understanding of the project among the stakeholders. Before the project manager sits down in front of his trusty keyboard, he must have a clear understanding of all spheres of influence and responsibilities in the project.

- He will have reviewed the historical information available from previous projects.
- He will have a clear idea of the goals of the project and all the stakeholders.
- He will have clarified the responsibilities between customer and supplier.
- He will have identified any constraints and work that is specifically excluded from the scope.
- He will have had discussions with the sponsor or funding agency, the customer and other major stakeholders.
- He will have had meetings, at the appropriate level, within the organization about the project.

The scope statement can be a section within the project plan or can be a separate document. Project Managers or Principal Investigators generally prepare the scope of work as a

separate document. We can attach the scope of work statement to a purchase order and have a short-form contract. The scope is used in other contract documents and forms to include preparing a Request for Proposal (RFP).

The scope statement should include the following information:

- **Strategy & Project Justification:** An overview of the University in relation to the project and the business need the project was undertaken to address. The project justification provides the basis for evaluating future tradeoffs. Outline features and functions that characterize a product or service or describe the work that must be done to deliver a product with the specified features and functions.

- **Product of the project:** A summary of the project deliverables. Subdividing the major project deliverables into smaller more manageable components is helpful and easier to quantify for a project manager, vendor or bidder.

- **Project Objectives:** Quantifiable goals in terms of time or deadlines, budget and technical quality that the project must achieve to be considered successful. Quality may be invoked by referencing industry standards. Cost, schedule, and quality measures should be addressed at a minimum.

- **Supporting detail:** Description of all identified assumptions and constraints considered during the development of the scope statement or to a level that benefits the other project management processes.

- **Scope Management Plan:** A description of how the project scope will be managed and how agreed changes will be incorporated into the project deliverables. There is usually a separate document describing the change control process and a cross reference to that document should be included in the scope management plan. The scope statement should be reviewed and approved by all stakeholders. The scope statement is the basis for further processes in the scope planning phase of the project, including scope definition, scope verification and scope change control. The plan should include a clear description of how scope changes will be identified and classified. Plans vary from formal to informal, detailed or broadly framed, based on the needs of the project.