Scope Management: Level 0
Mastering Project Scope -- One Iteration at a Time
Objective

• Every project (no matter what size) needs two things done right...
  – Definition of REQUIREMENTS
  – Definition of SCOPE

• This presentation is about mastering SCOPE

• “Scope” means knowing what to work on...
  – ...and knowing what NOT to work on
  – This definition applies to everyone on the team

• Scope management requires coordinated effort...
  ...every project, every week, every day
Two Questions:

• How do you master scope when you don’t (yet) know the total scope?

• How do you focus team attention?
  – Today?
  – This week?
  – This month?
Answer: Always Work in Iterations

• Nothing new about this idea
• Three important pieces that belong together
  Mindset
  Skill set
  Toolset (e.g., SharePoint + other tools)
Start small. Practice. Scale up!

One Iteration at a Time

Level 0

Level 1

Level 2

Level 3

Level 4

Number of Projects

Project Size
Mindset (Level 0)
Mastering Project Scope - One Iteration at a Time
Level 0 (One iteration at a time)

- **Level 0:** Scope is defined one iteration at a time ... by a **CONCISE** list of **intended outcomes**
  - The items on this list are called “**outcome items**”
  - Scope is not a task list (action items or to-do’s)
  - Tasks (actions, to-do’s) are not included
    - Task management is easier when we are focused a concise list of intended outcomes
  - **Scope = current central list of “outcome items”**

- Rapid scope definition...
- Rapid scope changes...
- ....but always deliberate
Mindset

• **ALWAYS** organize projects in iterations
  - As short as one week (more ambiguity, more discovery)
  - As long as one month (less ambiguity, less discovery)

• **Iteration planning**...
  - Define scope in a single location (e.g., a backlog list)
  - Quantify scope (not all items are the same size)

• **Daily planning**...
  - Limit actions (tasks) to current iteration ...only!
  - Very short stand-up meeting
Mindset

• Recommendation: Create two checklists
  ✓ Iteration checklist
  ✓ Daily checklist
  ✓ It takes weeks to develop a habit
  ✓ Put these 2 checklists on your calendar until they become habit

• No matter how hectic work becomes, don’t fail to follow your checklists
Skill Set (Level 0)
Skills that will help you be more productive
The most important skill...

• Keep **outcomes items** and **action items** in separate lists (two separate lists)

**Outcome Items**
- Create a short simple list
- Provides structure & control
- Outcome items are a good basis for reporting status

**Actions Items**
- Also called “tasks”
- Chaotic, turbulent, noisy
- Action items are NOT good for scope definition

• **IMPORTANT:** Changing a list of **action items** does not (should not) change your scope.
  Changing your list of **outcome items** DOES change your scope.
First problem...

- Blending/mixing/tangling **outcome items** and **action items** into an indistinguishable mess.

*Ad hoc* scope management  
Project Smoke!

See Chapters 12-13
Second problem...

- No single central list or not common understanding of “DONE”

- Even in very dynamic environments, we must have a single list of outcome items for every project.
  - Under some level of scope control
  - Especially important in dynamic environments
Third problem...

- Not tracking accomplishment of outcome items

..as distinct from reporting actions (tasks)
An important skill

- Assign a value to each outcome item
  - Generically called “outcome value” (OV)
  - Used to compare relative size of outcome items
  - Agile teams often use the term “story points”
    - 1, 2, 3, 5, 8, 13, 21, 34 (planning poker)
  - In “Earned Value Management”, OV is called BCWS and it is measured in dollars
  - OV can be any relative “size” of scope
    - An outcome with OV=10 requires twice as much attention as an item with OV = 5.
Why quantify scope?

• Why should I take time to assign OV?
  - It significantly improves conversations about scope
  - That leads to better team understanding of scope
  - It also allows you to focus on just the right amount of work
  - It allows us to track delivery of value to the business
How to track progress

• **Classic method: Report % complete**
  - Project A: “I’m 90% complete.”
  - Project B: “I’m 90% complete.”

• **Better method: Report OV Remaining (OVR)**
  - Project A: “OV = 10, OVR = 1, 90% complete”
  - Project B: “OV = 100, OVR = 10, 90% complete”

• **Burndown charts (OV and OVR) are great way to demonstrate outcome-focused progress**
Tool Set (Level 0)
Choose the tool set that allow you to express your skill set and mindset
### What does DONE mean?

**DONE** is a term used to indicate that a task or outcome item has been completed to the satisfaction of the stakeholders. It is a key component of Agile and Scrum methodologies, where the state of a task can change from **Not Started**, **In Progress**, **Ready for Review**, **Ready for Development**, **In Development**, **Done**, **Ready for Acceptance**, **Not Ready for Acceptance**, **Rejected**, to **Cancelled**.

<table>
<thead>
<tr>
<th>Outcome Item</th>
<th>Outcome Item Name</th>
<th>Outcome Value (OV)</th>
<th>OV Remaining (OVR)</th>
<th>Outcome Owner</th>
<th>Modified</th>
<th>Modified By</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>0806-PM</td>
<td>Half hour per day to plan and track outcome items. (2.5) Plan iteration 0813 (.5) Report status to Terri Wed and Fri (1)</td>
<td>4</td>
<td>3</td>
<td>Garry Booker</td>
<td>8/4/2008 8:49 AM</td>
<td>Garry Booker</td>
<td>Ready</td>
</tr>
<tr>
<td>0806-Learn</td>
<td>Updated stakeholder list. IT is the team, Developers, BIAs, more to come.</td>
<td>6</td>
<td>0.5</td>
<td>Garry Booker</td>
<td>8/4/2008 8:50 AM</td>
<td>Garry Booker</td>
<td>Waiting</td>
</tr>
<tr>
<td>0806-LevPres</td>
<td>Level 0 presentation, 2nd draft...complete. -- &lt; 30 minute duration, 100% practice. Little/no theory. No overview. Keep it short and focused on GTD core skill. (Scope changed 5/4)</td>
<td>8</td>
<td>8</td>
<td>Garry Booker</td>
<td>8/4/2008 16:03 AM</td>
<td>Garry Booker</td>
<td>InProgress</td>
</tr>
<tr>
<td>0806-PilotSite</td>
<td>John up and running on pilot site. Keep it focused on outcome item and outcome burndown chart. I will do daily burndown if he will update his OV and OVR data daily. John using backlog and outcome lists to tackle total scope.</td>
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### Key Calculations

- **Sum = 34**
- **Sum = 19.5**
Excel List (Actions)

Note: This is just one way to organize work.

The important thing is that action items (tasks) are distinct from outcome items (scope)
# Task Boards (Outcomes and Actions)

<table>
<thead>
<tr>
<th>Story</th>
<th>To Do</th>
<th>In Process</th>
<th>To Verify</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>As a user, I... 8 points</td>
<td>Code the... 9</td>
<td>Code the... 8</td>
<td>Code the... 4</td>
<td>Code the... 6</td>
</tr>
<tr>
<td></td>
<td>Code the... 2</td>
<td>Code the... 8</td>
<td>Test the... 4</td>
<td>Test the... 6</td>
</tr>
<tr>
<td></td>
<td>Test the... 8</td>
<td>Test the... 8</td>
<td>Test the... 8</td>
<td>Test the... 8</td>
</tr>
<tr>
<td></td>
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</table>

**Outcome items**

http://www.mountaingoatsoftware.com/task_boards
**Burndown Chart (OV and OVR)**

It takes a minute or two to update this chart every day and post it.

Outcome Value (OV) = Scope

Outcome Value Remaining (OVR) = Scope Remaining
Three Notes:

• The numbers are not the point
  – It’s not hard to “game” the numbers
  – What’s important: achieving intended outcomes
  – The numbers just help you focus attention on what is achievable.

• This is NOT difficult. It just takes practice.

• But what if my boss or client asks me to do something that’s not on my backlog?
  – Rapid scope change
## Rapid Scope Change

### New outcome item

**0805-FN**
- Half hour per day to plan and track outcome items. (2.5)
- Plan iteration 0813 (6.5)
- Report status to Terri Wed and Fri (1)
- Outcome Owner: Garry Booker
- Date: 3/4/2006 8:49 AM
- Status: Ready

**0805-Learn**
- Updated stakeholder list. IT Biz Systems, Developers, ELs, managers, ... more to come. Keep filling journal.
- Outcome Owner: Garry Booker
- Date: 3/4/2006 10:22 AM
- Status: Waiting

**0805-Lev1Pres**
- Level 0 presentation, 2nd draft...complete. -- ≤ 30 minute duration. 100% practice. Slight/no theory. No overview. Keep it short and focused on GTD core skill (Scope changed 0/4)
- Outcome Owner: Garry Booker
- Date: 8/4/2006 10:56 AM
- Status: InProgress

**0805-Lev1Pres**
- DEPRECATED. Level 1 Presentation started. Move up from GTD to Scrum. Backlog is key artifact and commonly the weakest link. Need a "BackLog Ready" signal before planning meeting.
- Outcome Owner: Garry Booker
- Date: 8/4/2006 8:31 AM
- Status: Deleted

**0805-PilotSite**
- John is up and running on pilot site. Keep it focused on outcome item and outcome burndown chart. I will do daily burndown if he will update his CV and OVR data daily.
- Outcome Owner: Garry Booker
- Date: 8/4/2006 8:50 AM
- Status: Waiting

### My Burndown Chart

![Burndown Chart](image)

- **View slide show**
Rapid Scope Change

SF0806 Outcome Items: 0806-WellListsDifferencesListed

Outcome Item *
0806-WellListDiff

OY *
8
Outcome Value

OYR *
8
Outcome Value Remaining

What does DONE mean? *
Top Priority!!
Done = List of differences between two well lists, with recommended action to resolve

Outcome Owner *
Garry Booker
Enter users separated with semicolons.

Status *
Ready

Created at 8/4/2008 11:01 AM by Garry Booker
Last modified at 8/4/2008 11:04 AM by Garry Booker
Rapid Scope Change

SF080G Outcome Items

<table>
<thead>
<tr>
<th>Outcome Item</th>
<th>What does DONE mean?</th>
<th>Outcome Owner</th>
<th>ON</th>
<th>ONR</th>
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<td>6</td>
<td>1</td>
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<td>8</td>
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</table>
Rapid Scope Change

Something has to give!

Increase in Scope

 OV

OVR

Increase in Scope
Remaining

Baseline

7/30  7/31  8/1  8/2  8/3  8/4  8/5  8/6
Rapid Scope Change

- What did we gain from this rapid (but deliberate) scope change?
  - We can make intelligent choices about what we will NOT get done in this iteration.
  - Scope change skill will be very valuable at Level 1 and higher of the Scalable Framework.
Build a trusted system

• Then, trust it!
• Every iteration
• Every day

• You choose: Master scope when work shows up or when it blows up.

• There are MANY tools to organize outcome items and action items
Next...

- Learning by doing...

- You choose toolset:
  - Task board
  - Excel
  - SharePoint project site