PROJECT SCOPE
April 19, 2018

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ADVOCATE. PROMOTE. DEVELOP.

OVERVIEW

1. **Project Background and Description**

> ℹ️ [Describe how this project came about. Was there a problem to be addressed? An event or circumstance that provoked the project idea? Who is involved? What is the purpose statement for the project]
>
> Note: To delete any tip (such as this) just click it and start typing. If you're not yet ready to add your own text, just click a tip and press spacebar to remove it.

2. **Project Scope**

> ℹ️ [Project scope defines the boundaries of a project. Think of the scope as an imaginary box that will enclose all the project elements/activities. It not only defines what you are doing (what goes into the box), but it sets limits for what will not be done as part of the project (what doesn't fit in the box). Scope answers questions including what will be done, what won't be done, and what the result will look like.]

3. **High-Level Requirements**

> ℹ️ [Describe the high level requirements for the project. For example:]

The new system/event/service must include the following:

- Ability to allow both internal and external users to access the application without downloading any software
- An event that is safe and family friendly
- A service that has an online registration option and email notification after registration

4. **Deliverables**

> ℹ️ [What is the intended outcome or product at the completion of this project? List agencies, stakeholders or divisions which will be impacted by this project and its outcomes. Describe how they will be affected by the project.]

5. Affected Parties

> [List business processes or systems which will be impacted by this project and describe how they will be affected.]

6. Affected Business Processes or Systems

> [Describe any specific components that are excluded from this project.]

7. Specific Exclusions from Scope

> [Describe how you plan to implement the project. For example, will all parts of the project be rolled out at once or will it be incremental? What will be included in each release?]

8. Implementation Plan

> [Include recommendations that lead to your proposed solution. Summarize what you're proposing to do and how you're going to meet the goals. You'll be able to expand on the details within the 'Our Proposal' section.]

9. High-Level Timeline/Schedule

> [Describe what the high level timeline/schedule will be to plan, design, develop and deploy the project. Generally, by when do you expect this project to be finished?]

APPROVAL AND AUTHORITY TO PROCEED

We approve the project as described above, and authorize the team to proceed.

Name	Title	Date

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04.19.2018   # Project Status Report

Project Name
[Project Name]

Client Name
[Client Name]

Project Manager
[Project Manager]

Prepared By
[Name]

Snapshot of Project

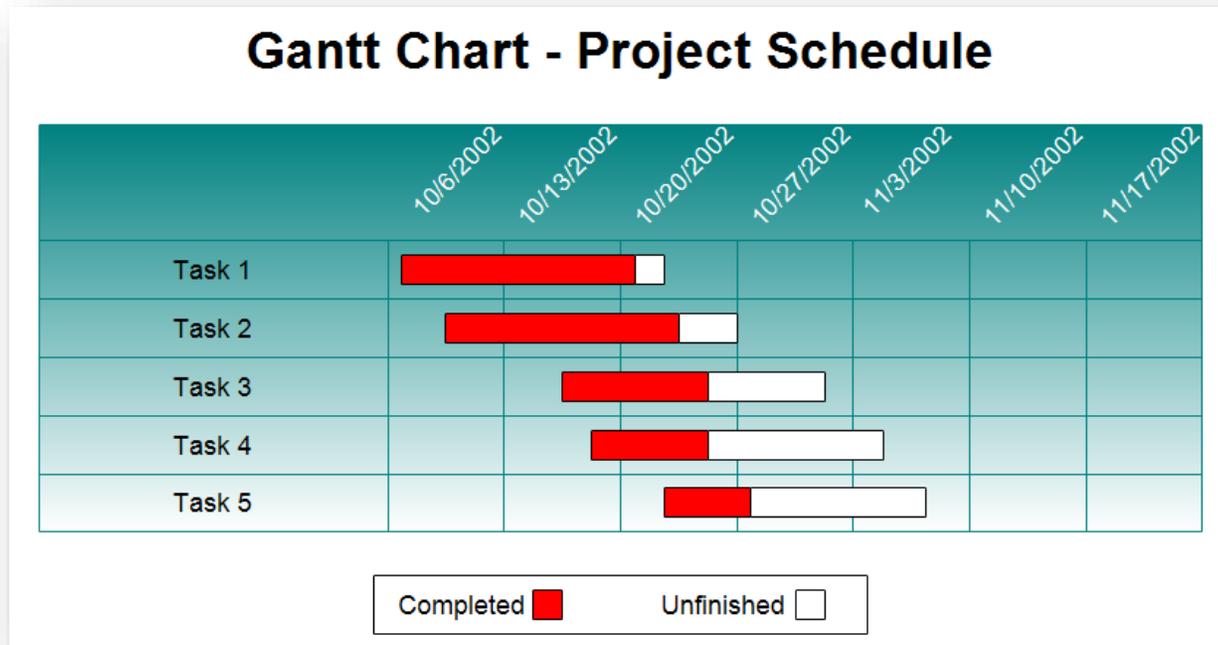| Activity	% Complete	Issues	Delivery Date	Owner

Status Summary

[Start text here.]

Budget Overview

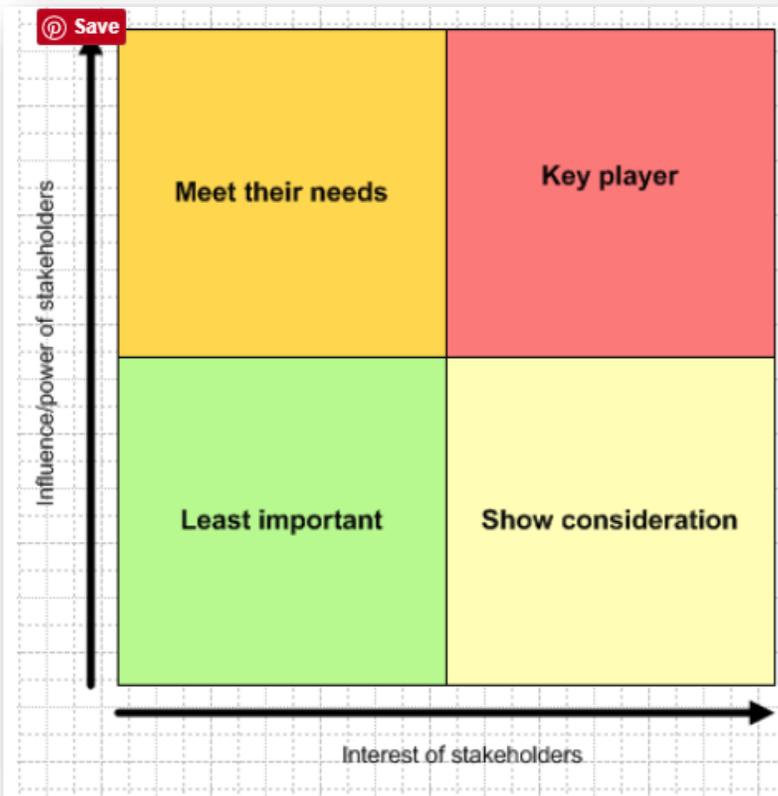| Item	Owner	On Track?	Notes

Timeline and Schedule

Gantt Chart - Project Schedule

	10/6/2002	10/13/2002	10/20/2002	10/27/2002	11/3/2002	11/10/2002	11/17/2002
Task 1							
Task 2							
Task 3							
Task 4							
Task 5							

Completed ■ Unfinished ☐

FNSB Eielson Regional Growth Plan

Schedule & Tasks

	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR
						2017	2018		
Project Initiation + Information Sharing									
Reconnaissance + What We Learned									
Draft + Final Regional Growth Plan							Draft RGP	Final RGP	
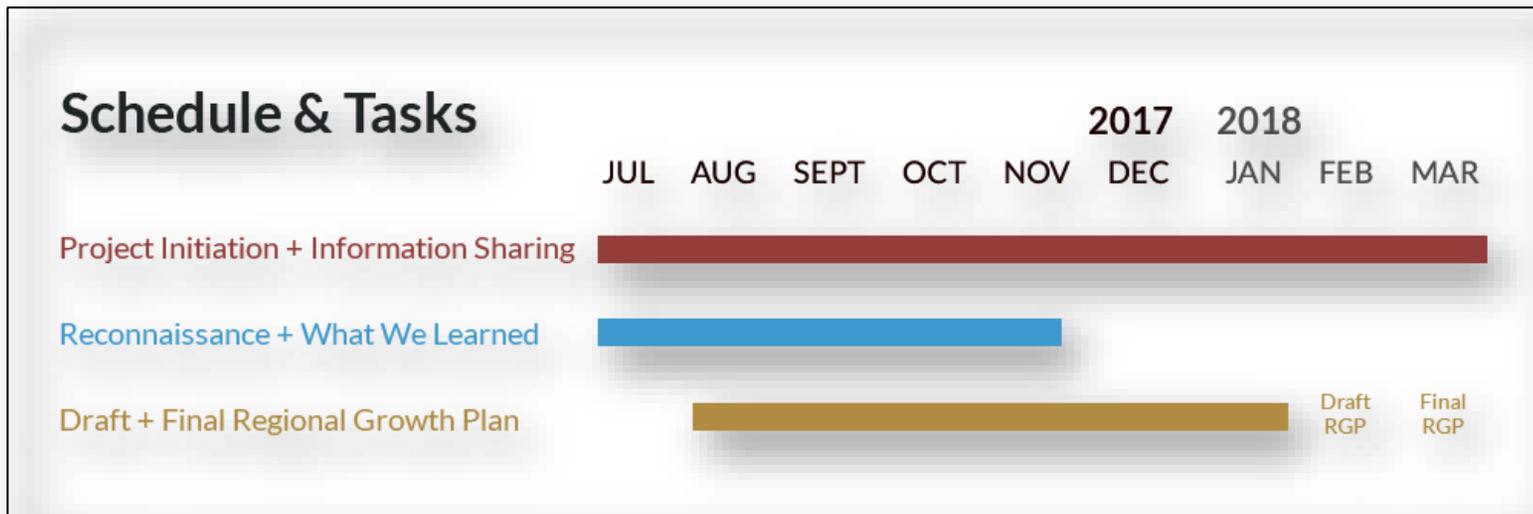
Stakeholder Management Theory

Influence/power of stakeholders

Meet their needs	Key player
Least important	Show consideration

Interest of stakeholders

Influence/power of stakeholders

Meet their needs
- engage & consult on interest area
- try to increase level of interest
- aim to move into right hand box

Key player
- key players focus efforts on this group
- involve in governance/ decision making bodies
- engage & consult regularly

Least important
- inform via general communications: newsletters, website, mail shots.
- aim to move into right hand box.

Show consideration
- make use of interest through involvement in low risk areas
- keep informed & consult on interest area
- potential supporter/ goodwill ambassador

Interest of stakeholders

Example:

PRACTICE:

POWER

HIGH POWER, LOW INTEREST

HIGH POWER, HIGH INTEREST

YOUR PROJECT
_____

LOW INTEREST, LOW POWER

HIGH INTEREST, LOW POWER

INTEREST

The secrets to running project status meetings that work!

Brownlee, Dana

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Abstract

One of the project manager's key responsibilities is to be aware of the status of the project at any given time. In order to do that, status meetings become a critical tool throughout the lifecycle of the project. Too often, unfortunately, these critically important meetings become unbearably inefficient, ineffective, and at times almost painful! The good news is that there are simple techniques that project managers can employ to improve the overall efficacy of these sessions.

Purpose of Project Status Meetings

A Guide to the Project Management Body of Knowledge (PMBOK® Guide) defines status review meetings as follows:

Status review meetings are regularly scheduled events to exchange information about the project. On most projects, status review meetings will be held at various frequencies and on different levels. For example, the project management team can meet weekly by itself and monthly with the customer. (PMI, 2004, p. 233)

Indeed, virtually all project managers are familiar with the status meeting. This is one tool that the project manager uses to "check in" on the project. Typically, the project manager wants to assess the status of each of the following elements during a status meeting:

- Task updates
- Schedule status update (Are we behind or ahead of schedule?)
- Budget status update (Are we under or over budget?)
- Quality/scope status update (Are we maintaining desired scope/quality levels?)
- Current or anticipated issues (e.g., changes, risks, resource issues, client satisfaction issues, vendor issues, etc.)
- Next steps

Because the project manager should be able to report up-to-date information to project sponsors or clients at any time, it's imperative for the project manager to conduct status meetings regularly. The frequency of these status meetings will vary depending on several factors, including (but not limited to) the following:

- Project complexity
- Number of team members
- Level of information required by project sponsor, clients, and others
- Project manager's level of task involvement

Effective status meetings not only benefit the project manager, by providing timely task updates, but also benefit the entire team, by providing a venue for recognizing milestone achievements, sharing information, and bringing problems/issues to the team. Unfortunately, too often these important meetings are ineffective and fail to benefit the project in the manner intended.

Common Project Status Meeting Dysfunctions

Interestingly, project status meetings that fail invariably seem to possess similar dysfunctions. Common project status meeting dysfunctions include the following:

- Lacking or poorly developed agendas
- Ill-prepared team members
- Poor time management during the meeting
- Allowing discussions to veer off topic—spending time on tangents
- Not getting balanced input from team members
- Ineffective handling of action items

Poorly developed agendas – Often, project managers simply assemble team members to meet without developing/circulating a clearly defined agenda including topics, timings, and topic owners. When status meetings have no agenda or one that is incomplete or unclear, the meeting lacks a framework or roadmap. Without this roadmap, the meeting easily runs off course and time is often wasted. In addition, if team members don't receive a clear agenda prior to the meeting, they often come to the session unprepared. Because the entire purpose of a project status meeting is to obtain status on tasks, identify issues, and so forth, it is imperative that team members gather specific data *prior to* the meeting and come prepared to answer certain key questions. The status meeting is *not* a general team get-together to touch base and share. Without specific predefined goals, the session wanders aimlessly.

Ill-prepared team members – Unfortunately, some team members feel that all they need to do for a status meeting is show up and participate. When this happens, the entire team wastes valuable time. Invariably, when a team member is unable to provide feedback on an issue because of not being prepared, the team typically wastes time speculating about it and someone is tasked with following up after the meeting and reporting back at the next meeting. These sorts of delays are not just frustrating; they can actually delay the project!

Poor time management – One of the biggest frustrations team members have with project meetings is that they often drone on too long (without much getting accomplished). When time isn't managed well, additional meetings are often required, which decreases team member morale and often rushes decisions. All of these can negatively impact not just the project timeline but also the quality of the project's product or service. When time isn't managed appropriately during status meetings, team members often become tempted to skip the meeting because they suspect it will be a waste of time and their time will be better spent other ways. Once team members start missing status meetings, their overall effectiveness begins to fundamentally break down.

Allowing discussions to veer off topic – This is an extremely common dysfunction during project status meetings. Quite frequently, topics or issues arise during the sessions that are outside the intended scope of that meeting. When participants spend more and more time on topics outside the scope of the meeting, less and less time is available for intended topics. This often means that the intended agenda topics are rushed or not addressed at all, resulting in poor quality decisions, delays, communication breakdowns, and the like.

Not getting balanced input from team members – One of the most difficult tasks any project manager has is dealing with different personalities on the team. More aggressive personalities can tend to dominate project meetings while more passive types tend to contribute much less to discussions and tend to be much less vocal about their opinions on a given issue. We've all heard that the squeaky wheel gets the oil, and that's unfortunately often true during project meetings. Too often a project manager or team leader will be overly influenced by a team member with an aggressive personality. When certain team members dominate while others sit passively (without providing critical input on an issue), the quality of the team's decisions suffer. Another major problem with this particular dysfunction is that the project manager often develops a skewed view of important project issues because one or two people may voice very strong opinions. Those opinions may not be representative of the group at all, but without balanced input from the group, he/she may leave the project status meeting with an inaccurate perspective of the team's views on a particular issue.

Ineffective handling of action items – One of the important parts of any project meeting is effective handling of action items. Often, issues come up during the meeting that must be addressed after the meeting. Too often these action items are casually mentioned verbally, which often results in *meeting déjà vu* (where no one follows up on the issue and the issue continues to resurface in future meetings). Another result of poor handling of action items is poor follow-up on critical project issues. Action items are the vehicle project managers use to assign follow up tasks after the meeting. When that process is ineffective, those follow-up tasks suffer. It becomes much easier for team members to complain that they didn't know about the action item, they didn't understand it, or they didn't have time to complete it. When action items aren't completed in a timely manner, project progress is stalled.

Clearly, these common project status meeting dysfunctions have significant negative impacts on the progress of the project. While the impacts on schedule, cost, and quality may be obvious, a more subtle impact is the erosion of the project manager's credibility with his or her team. Team members view the project manager as the person responsible for running smooth, relevant, efficient status meetings. When that doesn't happen, often the project manager is deemed to be weak and ineffective. Indeed, the project manager's ability to run effective status meetings not only directly impacts the progress of the project but also influences how he or she is perceived by others.

Project Manager as Facilitator

Indeed, effective meetings need both a leader and a facilitator. Often, the meeting leader is the project manager, senior manager, or subject matter expert. Most project managers are very familiar with this role, as they have the legitimate authority on the project. They're often less familiar with the role of facilitator. A meeting facilitator is someone who helps guide the group toward its goals during the meeting by focusing primarily on the processes the group will use to achieve desired outcomes. Status meetings require both a facilitator and a leader to run optimally. While project managers sometimes designate someone else as a facilitator for their meetings, more likely the project manager wears both hats.

Leader Focus Areas	Facilitator Focus Areas
What we discuss	How we manage the discussion
Details of issues/tasks	Process used for issue identification
Obtaining status on tasks	How we will document/communicate status within the group setting
Identifying resolution of issues	Taking the temperature of the group
Achieving specific project-related goals	Documenting action items
Contributing to team discussions	Ensuring there is structure to the meeting

Exhibit 1 – Leader versus Facilitator Comparison

In short, the meeting leader is often focused on the "what," while the facilitator is often focused on the "how". Both are necessary for an optimally effective meeting.

Because many project managers are leading status meetings, they tend to focus exclusively on their role as meeting leader and ignore their role as meeting facilitator. The good news is that they are not solely responsible for the facilitator role. Many project managers ensure that the meeting is appropriately facilitated by inviting an outside facilitator or asking team members to play the role of facilitator. Team members should be actively engaged in all facets of project success and having them perform key facilitation activities is one way to encourage more involvement. Because the facilitator should be constantly observing and prodding the group from the sidelines, they're somewhat "detached" from much of the meeting content. In this case project managers may not want to ask any of the team members/subject matter experts to fully take on this role (as their contribution to meeting discussions is key). In this case, the project manager may want to assign specific facilitation tasks to certain team members. Key facilitation tasks that he/she may want to delegate include the following:

Keeping track of time

Alerting the team if discussion gets off topic

Documenting action items

Developing a parking lot

Asking questions of those not contributing to the discussion

Playing devil's advocate if no one in the group is questioning

Techniques to Enhance Project Status Meeting Effectiveness

Seasoned facilitators use specific techniques to avoid common meeting management pitfalls. In particular, project managers should implement the **BLISS** strategy to enhance the effectiveness of their project status meetings.

Be Efficient

Meeting efficiency refers to accomplishing as much as possible in the shortest amount of time with the smallest number of people participating in the meeting. Running efficient meetings is important because it respects everyone's time and provides team members more time to focus on task completion, encourages team members to participate in project meetings, and builds goodwill for the project manager.

To run efficient project status meetings, project managers can employ several specific techniques:

Assign time-intensive tasks as homework—don't waste meeting time reading reports, reviewing materials, and so forth.

Only invite those team members truly necessary for the meeting—if you want to want to include other team members but they're not required, designate them as optional attendees.

Assign a timekeeper to let the team know when five minutes remains in each section of the agenda.

Prepare a standard "status update form" for all task leaders to complete prior to the meeting.

Consider shorter, more frequent status meetings.

Use facilitation techniques like simultaneous documentation to develop ideas very quickly (e.g., having attendees spend two to three minutes individually writing down ideas at the same time before initiating a group discussion).

Use round robin (going around the room to get feedback from each attendee) and other facilitation techniques to balance participation and minimize dominators.

Look Back – Look Forward

Look back – look forward refers to reviewing the previous immediate timeframe and the immediately upcoming timeframe as well (e.g., +/- 2 weeks). During a status meeting, "looking back and looking forward" encourages the team to focus on a current snapshot of the project and zero in on issues relevant to the current period. This approach provides a brief historical view that offers context for the "current state" project discussion. The brief review also affords important opportunities to recognize team members for recent accomplishments.

To implement the "look back-look forward" technique, consider the following:

Produce a project schedule that focuses on the immediately preceding and upcoming time periods

Highlight key milestones/accomplishments on the project schedule

Summarize key events leading to the current state

Ask task leaders and team members to anticipate risks/issues likely during the immediately upcoming time period

Although the "look back-look forward" review technique focuses the status meeting on the current time period, the agenda should always provide opportunities to address relevant issues outside this time period. If there is a pressing issue anticipated to occur at the end of the project and the status review session is occurring early in the project, a team member should still feel comfortable to raise the concern during the "Open Issues or Risks/Concerns" section of the agenda. This technique is not intended to exclude any mention of tasks outside the immediate timeframe, but instead focus the group's attention on that timeframe and minimize time wasted by repeatedly reviewing tasks occurring significantly prior to or after the status review session.

Insist on Accountability

Project managers rely on subject matter expert team members to complete tasks in a timely manner. Throughout the course of the project, additional items will arise requiring follow-up by various team members. Team members must be accountable for tasks that they take on if the project is to reach its objectives within the parameters set. When team members are not held accountable, it creates a myriad of problems for the project:

Tasks suffer as they aren't completed properly

The project manager often starts taking on tasks he or she shouldn't, which takes his or her focus off the management of the project

Other team members notice that some are not being held accountable and it negatively impacts their behavior

Team members who haven't been held accountable continue the negative behavior

Project schedule delays ensue

Project manager credibility is impacted

To avoid these problems, project managers must foster a culture of accountability from the outset of the project. This should certainly be enforced during project status meetings, when the project manager is often performing a "check" to determine levels of task completion and possibly assign new action items. Many project managers assume that when a team member does not complete a task as assigned, his/her only recourse is to confront them directly. While that approach is appropriate in certain situations, encouraging the team to hold each other accountable tends to build a culture of accountability within the team and be more effective long term.

Sounds good? Well, the obvious question becomes *how* does the project manager encourage this culture of accountability in the project team during status meetings? Consider these techniques to encourage that dedication to accountability in the team:

Write all action items with a task owner and due date on a flip chart in real time during the meeting

Repeat the action items to the owner and confirm his/her understanding of it

Ask action item owners to suggest due dates (do not mandate due dates)—negotiate dates if needed.

Maintain a database of action items that task owners are responsible for updating

Begin all status meetings with a review of previous action items

Consider using electronic tools to provide automatic reminders of action items

Discuss importance/consequences for missing action items during project kickoff

Address repeat offenders offline to explore potential causes

Team members are certainly influenced by the behavior of and reactions from other team members. Project managers should capitalize on this to foster a team that is highly accountable.

Simplify the Agenda

The agenda is your roadmap for the meeting. It should include not just topics but also timings, topic owners, and possibly even facilitation techniques for each section. A well developed agenda helps the project manager keep the team on track, makes preparation easier for team members, reduces meeting time, and provides a sense of focus for the meeting.

For project status meetings, agendas should be simple and consistent. The project manager should clearly indicate what topics should be covered at each regularly scheduled status meeting—no surprises! Project managers should get consensus on the status meeting agenda early in the project cycle, then circulate that agenda as a reminder prior to each meeting. A sample status meeting agenda might include the following topics:

Review of action items from previous meeting

Look back-look forward review (Where have we been? Where are we going?)

Task leader updates (using update form—include feedback on cost, time, and quality)

Review of open issues

Action item/parking lot summary

Debriefing (only conducted occasionally)

As much as possible, project managers should strive for agendas that are simple and to the point. During a status meeting, the discussion should be very direct and focused on providing specific status updates. Agendas that are overly aggressive tend to result in lengthy meetings with less focus.

Stay Focused

One of the biggest dilemmas project managers face during project status meetings is keeping focused on the topic at hand. Everyone seems to have their favorite soap box issue that they'd love to discuss extensively, whether it's on the agenda or not! These tangents not only take the group off topic but also tend to take up critical time during the meeting and cause meetings to run late. Another problem with tangents is that they tend to cause the meeting to bounce from topic to topic without facilitating true resolution of the intended topic at hand. In short, getting sidetracked impacts both the efficiency and effectiveness of the status meeting.

Project managers should consider a few simple techniques to help maintain focus during their status meetings:

Ask someone on the team to "raise a flag" or otherwise point out when the discussion is veering off topic

Question whether the issue raised can be taken offline

Use an egg timer or similar device to "time box" discussions about issues not on the agenda (but the team agrees should be discussed)

Redirect the issue to the parking lot

Develop ground rule about keeping the group on topic (e.g., ELMO—"Everyone, Let's Move On)

Maintaining focus during status meetings is critical to keep meetings within the allotted time. The key for implementing any of these techniques successfully is surfacing the issue with the team early in the project cycle and identifying techniques that the team will support to address this common problem.

Conclusion

Project status meetings are a critical tool in the project manager's tool box. Unfortunately, too few project managers have adopted methods and techniques to ensure that these sessions are succinct, productive, and valuable. It's not uncommon for project managers to conduct at least one 90-minute status meeting per week. For a team of six, that's an investment of nearly 40 hours in just one month! Too many project managers assume that a status meeting means sending out a meeting invitation and just showing up. In reality, effective status meetings require so much

more! The good news is that when project status meetings are effective and efficient, the results are tremendous! Productive project status meetings increase team morale, provide timely information on project status, uncover potential risks, provide a forum for timely issue resolution, and encourage relevant information sharing.

References

Project Management Institute. (2004). *A guide to the project management body of knowledge (PMBOK® Guide)* (2004 ed.). Newtown Square, PA: Project Management Institute.

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