

The background of the slide is a photograph of a desk. On the left, there is a stack of books, with the top one having a green cover. In the center, a yellow pencil lies horizontally. Below the pencil, a spiral-bound notebook is open, showing lined pages. The entire scene is softly lit, creating a professional and academic atmosphere.

PREVENTING SCOPE CREEP ON DOCUMENTATION PROJECTS

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Technical Writer, Content Designer, and Academic with a Fondness for Cutting-edge
Technology and Usability

MY BACKGROUND

MY BACKGROUND

- My name is Lu Kondor, aka Dr. Lu as I am called by many of my students
- Previously a full-time senior technical writer at a major visual effect organization for over eight years but I have been tech writing longer than that
 - More than 20 years experience with high technology in the entertainment industry
 - Feature film credits for films such as *Edge of Tomorrow*, *Beowulf*, *Cloudy with a Chance of Meatballs 2*, *Curious George*, *Arthur Christmas*, and *Hotel Transylvania*
- Currently adjunct faculty at California State University Dominguez Hills teaching certificate classes in the technical communication program: *Advanced Technical Communications*, *Information Design*

MY BACKGROUND

Qualifications:

- Managed many large-scale documentation projects (many simultaneously)
- Project Management Certificate from the California Institute of Technology
- Doctorate in Management focusing on business (information systems)
 - Dissertation: *Identifying Effective Technical Communication Processes For Software Engineering Teams: A Phenomenological Study*
- Senior member of the Society for Technical Communication
- Member of the Academy of Television Arts & Sciences (electronic production peer)

What does scope creep mean to my projects?

PROJECT SCOPE

DEFINITIONS: WHAT IS SCOPE?

- According to Project Management Body of Knowledge (PMBOK)
 - Scope of the project = the work to be done
 - Scope should be controlled as the project and product specifications are progressively elaborated
 - “Progressive elaboration means developing in steps and continuing by increments” - *PMBOK Guide*

DEFINITIONS: WHAT IS SCOPE CREEP?

- According to the PMBOK, scope creep is defined as adding features and functionality (project scope) without addressing the effects on time, costs, and resources, or without customer approval
- This phenomenon can occur when the scope of a project is not properly
 - Defined
 - Documented
 - Controlled
- Scope Creep is mainly considered a negative occurrence
 - Should be avoided

WHY DOES SCOPE OF A PROJECT MATTER?

Warning: PROJECT RISK!

SCOPE CREEP CAN LEAD TO PROJECT
FAILURE!



What can keep my documentation projects from getting scope creep and keep them on budget and on schedule?

THE BASICS OF PROJECT MANAGEMENT

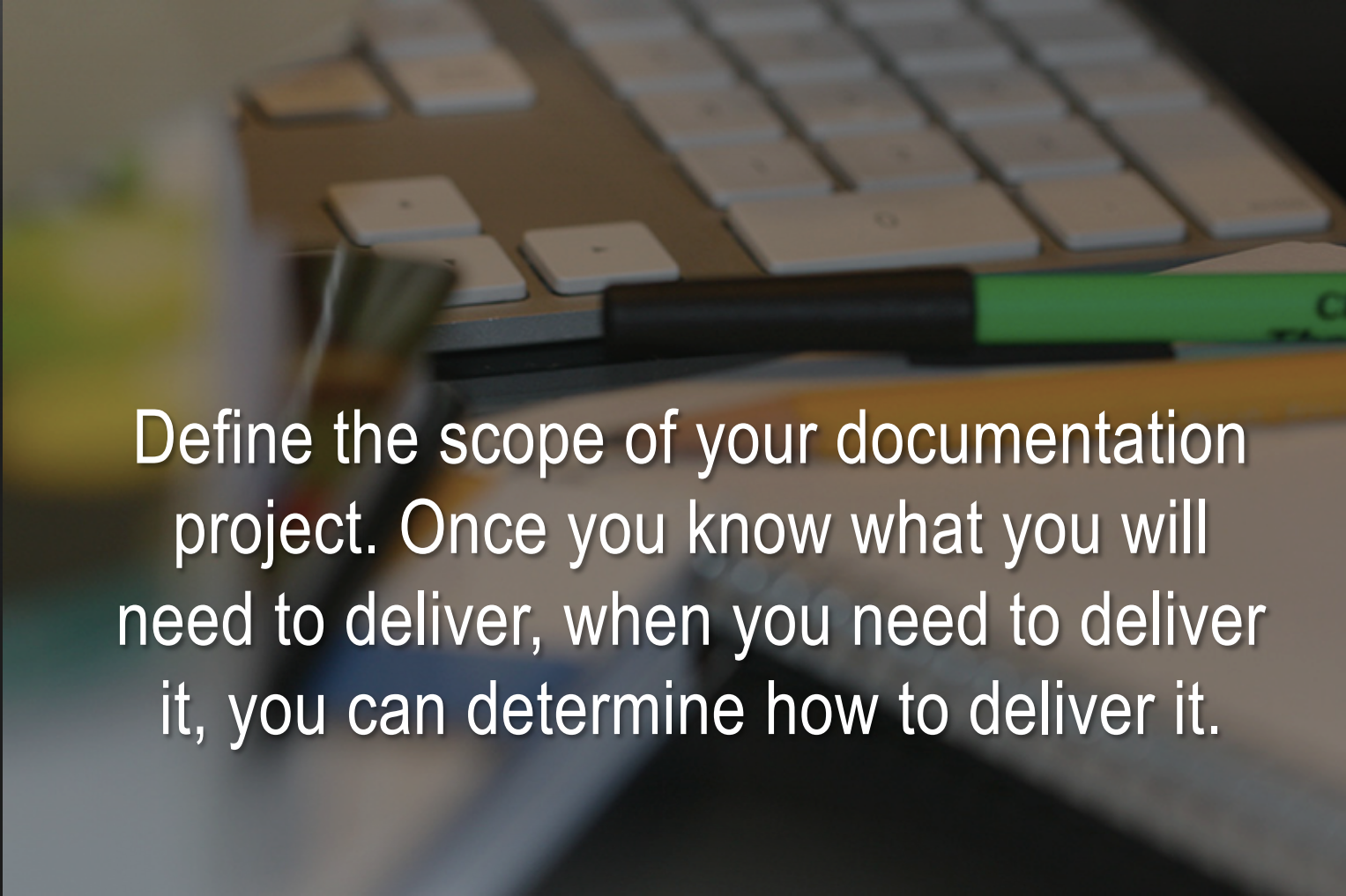
PROJECT MANAGEMENT FOR DOCUMENTATION

- No dedicated documentation project manager?
 - Not to worry
- No need to be a guru in project management
- You just a few basic project management tools and concepts needed
 - Many project management techniques are not complex
 - Common sense & preparedness

PROJECT FAILURE – THE BIG FIVE

According to Frese & Sauter (2003)

- Lack of planning – incomplete requirements, scope poorly defined
- Lack of communication between stakeholders
- Failure to reach milestones, schedule problems, unrealistic expectations
- Resource management – lack of resources
- Change management & quality control issues



Define the scope of your documentation project. Once you know what you will need to deliver, when you need to deliver it, you can determine how to deliver it.

WHY DOES SCOPE OF A PROJECT MATTER?

- Critical success in every documentation project depends on monitoring and controlling the defined scope of a project – especially true for large-scale documentation
- Project management is important on any scale documentation project because it provides a clearly defined baseline plan of project objectives, schedule targets, and budget estimates negotiated at the start of a project, defining the overall scope of the documentation project
- It is critical to delivering successful quality documentations for clients and employers

WHY DOES SCOPE OF A PROJECT MATTER?

- Preventing scope creep on documentation projects, or preventing your projects from going over budget and over time without controls, helps you achieve your goals of completing the project as agreed



SCOPE CREEP CAN ORIGINATE FROM:

- Poor implementation of change control
- Incomplete gathering of requirements before the beginning of project execution
- Insufficient involvement of critical stakeholders (including the customer)
- Lack of support from the executive sponsor, management, stakeholders

LESSON: DON'T HAVE A RUN AWAY PROJECT!



WHAT TO WATCH OUT FOR

- **Technical Scope Creep** – Technical scope creep can show up when the project team wants to please the customer and is not able to reject the customer's request for a change in the requirements during project execution
 - *Gold-plating* is another reason which can cause technical scope creep
 - The project team (or product development/design team) adds additional features and functionality that are not part of original requirements, without approval
- **Business Scope Creep** - The business scope creep occurs due to external forces that may be beyond the control of project manager
 - An example might be the continual changes in market trends, which makes previously defined requirements now obsolete

WHAT DO WE DO TO CONTROL SCOPE?

Clearly define the project scope, schedule, & resource needs!

- Plan the Scope of the Project
 - Outline necessary tasks, requirements, deliverables & define the steps to project completion
 - Ask yourself: What are my *all* documentation deliverables?
- Project Scope Statement (PMBOK term)
 - Create the documentation that states the scope
 - Use the tools you need: It can be an outline, Work Breakdown Structure (WBS) to create a decomposition of the work into internal & external deliverables, report, etc.

DOCUMENTATION PROJECT CONTROL = *KNOWLEDGE + PROJECT MONITORING + ACTION*

- Get stakeholders involved – after meetings provide access to notes of discussion
- Get sign off of the scope defined in the documentation scope statement
- Make a clear schedule and make sure you know when deliverables are due, key progress reports are due, and what other key stakeholders are doing
- Don't procrastinate – if something changes that will affect cost, your schedule (time), or resources address it right away

Do I need to track the schedule and how?

THE BASICS OF THE SCHEDULE

WHY A SCHEDULE?

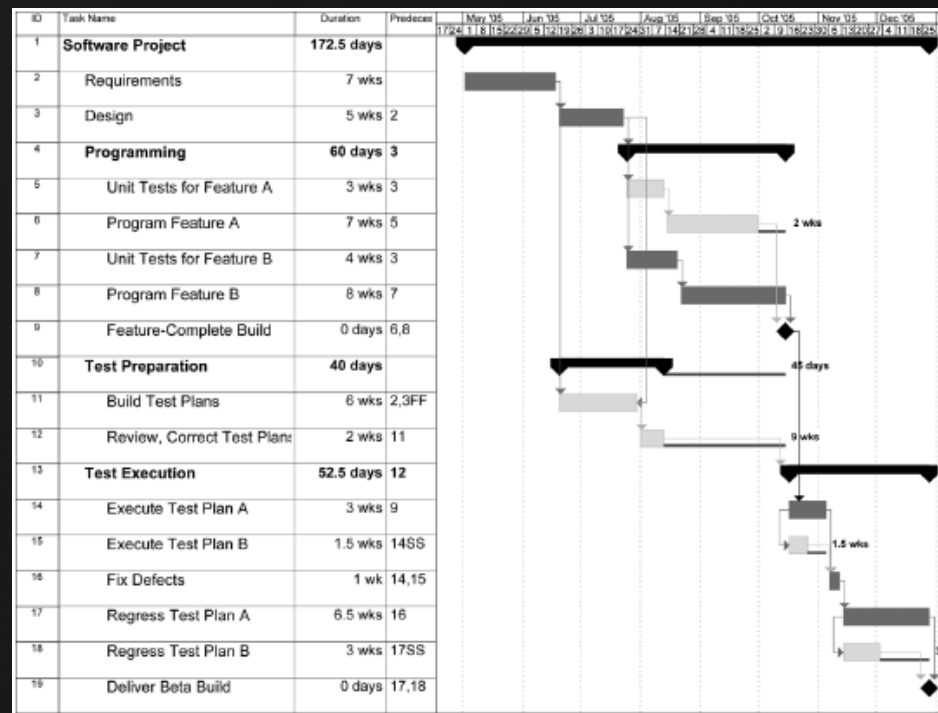
- Small and large projects need to have tasks created and executed on time and in order to achieve providing the client with the deliverable they want
- Easier to track progress, issues, changes, and risk to the project
- Easier to schedule resources & control costs
- Increases efficiency

SHORT, SIMPLE LIST OF INFORMATION FOR YOUR SCHEDULE

- Ask yourself if you have the following information
 - **Activity List** – all schedule activities (tasks) planned to be performed on project
 - **Activity Attributes** – includes many things such as what needs to come first, related activities & tasks, resource requirements
 - **Milestone List** – major events in the schedule – mandatory (required by client) or optional (based upon project requirements)
 - ***How will you handle request changes?*** Updating the schedule as changes come in

SEQUENCE IT!

Create your schedule



MONITOR AND CONTROL PROJECT WORK

- Compare the actual documentation project performance to your schedule
 - Meeting milestones? Can you identify any issues? Recommend changes if necessary to correct problems.
- Maintain timely and accurate information about project progress
 - Allows you to report to stakeholders all progress and explain or point out any issues early
 - Provides easy way to report status of project, measurements (where you are at), and forecasting of progress and completion (will you finish on time & on budget?)
- Gives the ability to update project cost if necessary
- Allows monitoring of approved changes to document

What if I need to change stuff?

THE BASICS OF CHANGE CONTROL

MANAGE THE CHANGES IN YOUR DOCUMENTATION PROJECT

- Projects can and do change
- Manage changes from the beginning of the documentation project until the end
- Changes can be
 - **Approved** – changes will then be incorporated into the document and scheduled
 - **Rejected** – various reasons, good to document in case there are questions later



INTEGRATED CHANGE CONTROLS

Put controls in place to help you manage your project changes and keep all stakeholders on the same page - *in the know...*

- Identify changes – those that either need to occur or have occurred
- Create a process to review & approve requested changes
- Manage approved changes
 - Control & update the scope, cost, budget, schedule, resources, and quality requirements based on approved changes
- Document/report impact of requested changes
- Control quality – how do the changes influence quality?

BENEFITS OF INTEGRATED CHANGE CONTROL

Provides opportunities to:

- Identify changes to the scope of the project as well as assess effectiveness of the changes
- Consider the impact of the changes & discover ways to improve
- Create a method to communicate changes to all stakeholders
- Control scope creep





TAKE COMMAND &
CONTROL OF YOUR
PROJECT

 command

OVERVIEW: CONTROLLING SCOPE CREEP

Scope creep can be controlled by

- Identifying & defining the scope of your documentation project including deliverables, what is and is not covered as part of the project, cost, resources, & time
- Outlining the project scope – put it in writing
- Creating and maintaining a schedule – includes tasks, milestones, dates etc.
- Monitor & control the project
- Change control – manage approved changes for your documentation projects
- Communicate often with stakeholders

FOR MORE INFORMATION

- My Website www.lakondor.com
 - PDF copy of this presentation will be available for download under the *News & Events* tab (LASTC Dinner talk)
- My contact information is on my site

REFERENCES

- Frese, R., & Sauter, V. (2003). *Project success and failure: What is success, what is failure, and how can you improve your odds for success?* Retrieved from http://www.umsl.edu/~sauterv/analysis/6840_f03_papers/frese/
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- Thakore, K. (2010). *How Should the Project Manager Deal with Scope Creep?* Retrieved from <http://www.projectsmart.co.uk/how-should-the-project-manager-deal-with-scope-creep.php>