

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

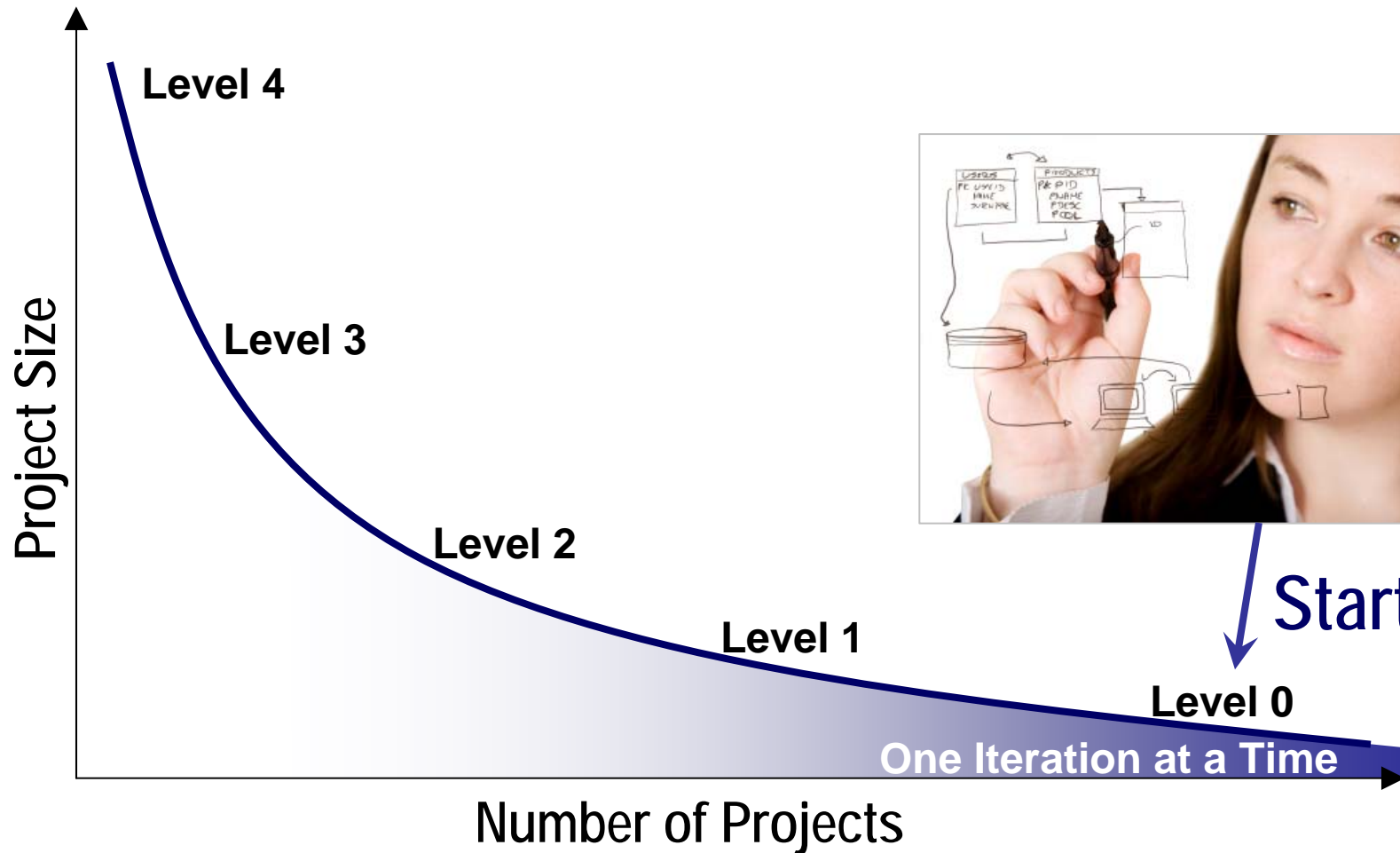
Two Questions:

- **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!



Start here

One Iteration at a Time

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

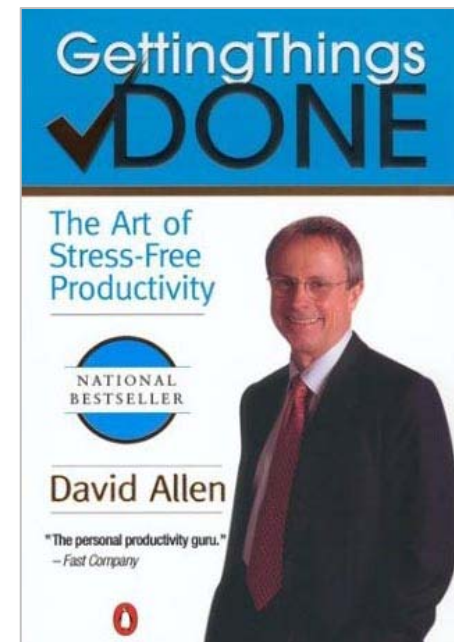
- **IMPORTANT:** Changing a list of **action items** does not (should not) change your scope. Changing your list of **outcome items** **DOES** change your scope.

First problem...

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



Ad hoc scope management
Project Smoke!



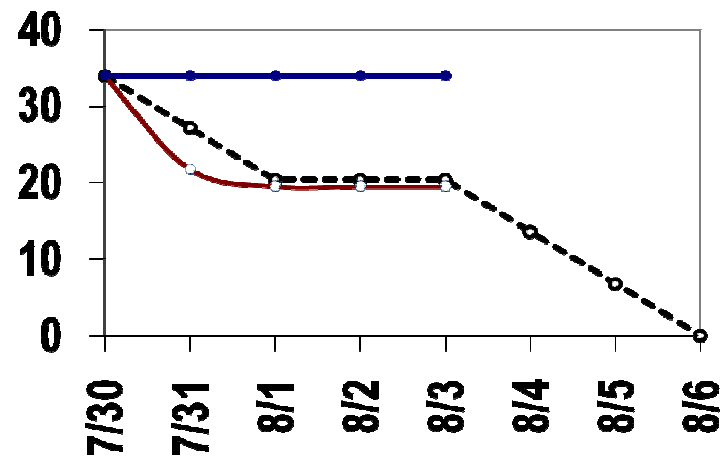
See Chapters 12-13

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



SharePoint List (Backlog)

Address <http://mysite.mychk.com/sites/gbooker/default.aspx> Go Links

New Actions Settings

Outcome Item	What does DONE mean?	Outcome Owner	OV	OVR	Modified	Modified By	Status
			Sum = 34	Sum = 19.5			
0806-PM	Half hour per day to plan and track outcome items. (2.5) Plan iteration 0813 (.5) Report status to Terri Wed and Fri (1)	Garry Booker	4	3	8/4/2008 8:49 AM	Garry Booker	Ready
0806-Learn	Updated stakeholder list. IT Biz Systems, Developers, BLs, ... more to come. Keeping journal.	Garry Booker	6	0.5	8/4/2008 8:50 AM	Garry Booker	Waiting
0806-LevOPres	Level 0 presentation, 2nd draft...complete. -- < 30 minute duration. 100% practice. Little/no theory. No overview. Keep it short and focused on GTD core skill. (Scope changed 8/4)	Garry Booker	8	8	8/4/2008 10:03 AM	Garry Booker	InProgress
0806-LevIP	DEPRECATED: Level 1 presentation. Up from GTD to Scrum. Backlog is key artifact and commonly the weakest link. Need a "BackLog Ready" signal before planning meeting.	Garry Booker	0	0	8/4/2008 8:31 AM	Garry Booker	Deleted
0806-PilotSite	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.	Garry Booker	16	8	8/4/2008 8:50 AM	Garry Booker	Waiting

Outcome Item Name

OV Remaining (OVR)

Outcome Value (OV)

What does DONE mean?

19 Done Trusted sites

Excel List (Actions)

Outcome Items	Action Items
0806-Learn	<input type="checkbox"/> Confirm intro meeting with Cami and Erin. SharePoint training --> SPM training
0806-Lev0Pres	<input checked="" type="checkbox"/> GB: Screenshot and annotate examples OI & AI lists <input type="checkbox"/> GB: Introduce OV and OVR and compare with percent complete method <input type="checkbox"/> GB: Introduce burndown chart. -- how much time cost vs. time it creates <input type="checkbox"/> GB: Introduce L&M status reports -- OI focused, not AI focused <input type="checkbox"/> GB: A glance ahead? <input type="checkbox"/> GB: Describe two-minute scope change
0806-PilotSite	<input type="checkbox"/> => JS: Review progress, fill in data, may I help?

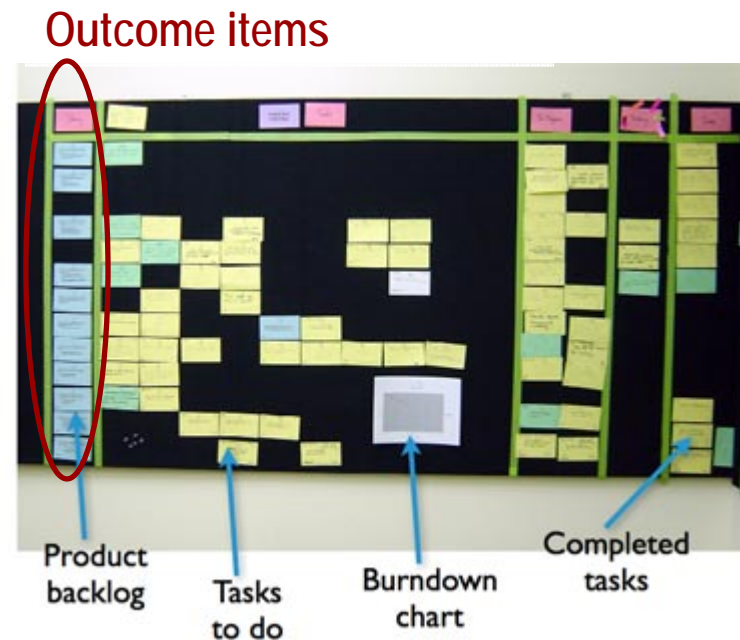
Action Items (tasks)

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)

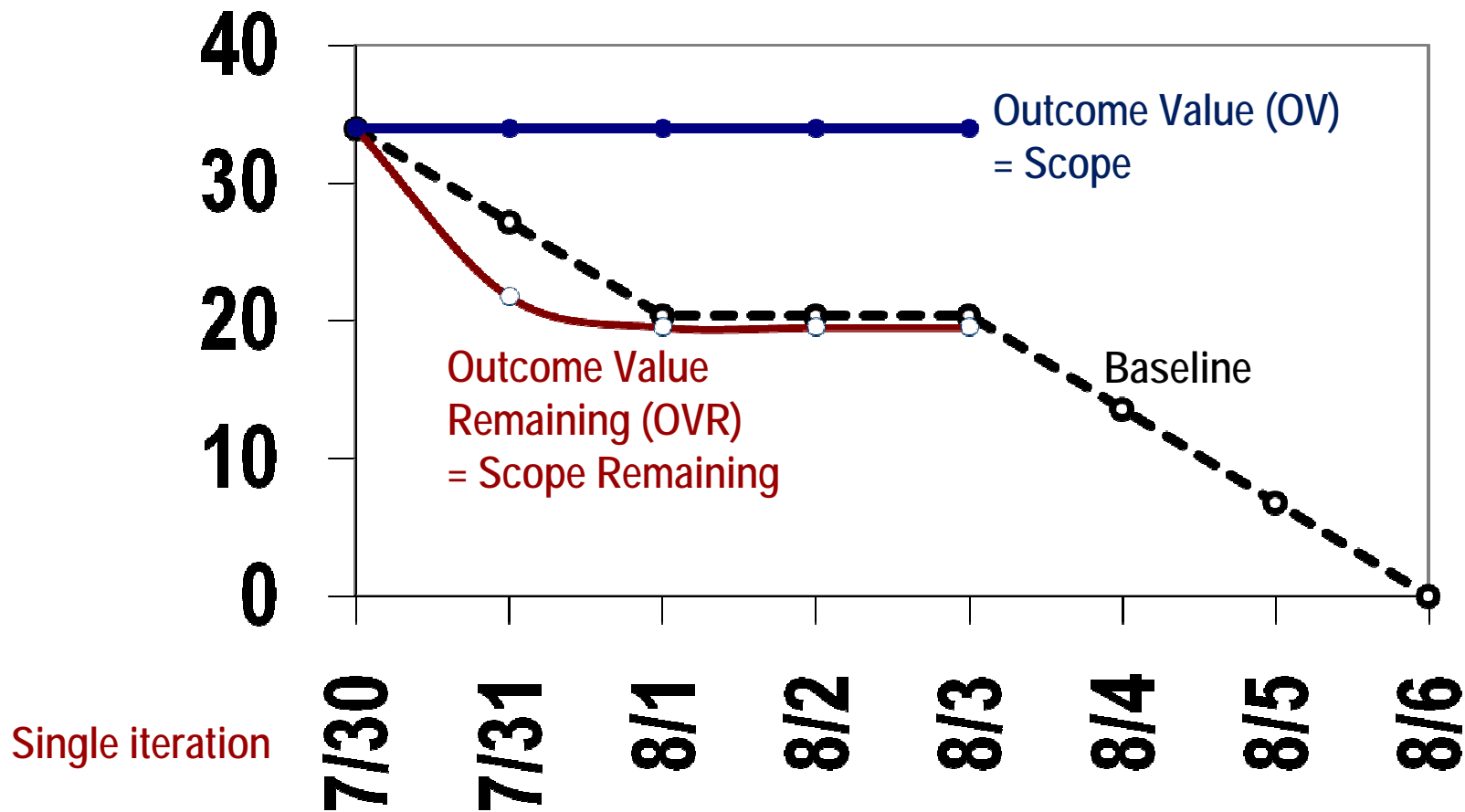
Story	To Do	In Process	To Verify	Done
As a user, I... 8 points	Code the... 9 Code the... 2 Test the... 8	Code the... DC 4 Test the... SC 8	Test the... SC 6	Code the... SC 6 Test the... SC 6 Test the... SC 6 Test the... SC 6
As a user, I... 5 points	Code the... 8 Code the... 4	Code the... DC 8		Test the... SC 6 Test the... SC 6 Test the... SC 6

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

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

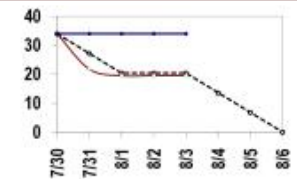
Rapid Scope Change

New outcome item

SF0806 Outcome Items

New		Actions	Settings	Outcome Owner	OV	OVR	Modified	Modified By	Status
New Item Add a new item to this list.									
				Sum = 34	Sum = 20				
0806-PM	Half hour per day to plan and track outcome items. (2.5) Plan iteration 0813 (.5) Report status to Terri Wed and Fri (1)			Garry Booker	4	3	8/4/2008 8:49 AM	Garry Booker	Ready
0806-Learn	Updated stakeholder list. IT Biz Systems, Developers, BLs, managers, ... more to come. Keep filling journal.			Garry Booker	6	1	8/4/2008 10:22 AM	Garry Booker	Waiting
0806- Lev0Pres	Level 0 presentation, 2nd draft...complete. -- < 30 minute duration. 100% practice. Little/no theory. No overview. Keep it short and focused on GTD core skill. (Scope changed 8/4)			Garry Booker	8	8	8/4/2008 10:56 AM	Garry Booker	InProgress
0806- Lev1Pres	DEPRECRATED. 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.			Garry Booker	0	0	8/4/2008 8:31 AM	Garry Booker	Deleted
0806- PilotSite	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. (e.g. Terri mentioned testing in production) Use task board like other projects.			Garry Booker	16	8	8/4/2008 8:50 AM	Garry Booker	Waiting

My Burndown Chart



[View slide show](#)

Rapid Scope Change

Garry Booker



My Home | My Work List | My Profile

Garry Booker > SF0806 Outcome Items > 0806-WellListsDifferencesListed > Edit Item

SF0806 Outcome Items: 0806-WellListsDifferencesListed

OK Cancel

Attach File | Delete Item | Spelling... * indicates a required field

Outcome Item *	<input type="text" value="0806-WellListDiff"/>
OY *	<input type="text" value="8"/> Outcome Value
OVR *	<input type="text" value="8"/> Outcome Value Remaining
What does DONE mean? *	<div style="border: 1px solid gray; padding: 5px;"><p>Top Priority!! Done = List of differences between two well lists, with recommended action to resolve</p></div>
Outcome Owner *	<input type="text" value="Garry Booker"/> Enter users separated with semicolons.  
Status *	<input type="text" value="Ready"/>

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

OK Cancel

Rapid Scope Change

SF0806 Outcome Items

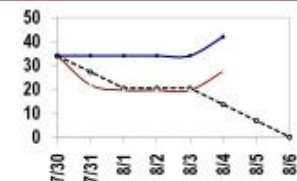
New		Actions		Settings					
Outcome Item	What does DONE mean?	Outcome Owner	OV	OVR	Modified	Modified By	Status		
		Sum = 42		Sum = 28					
0806-PM	Half hour per day to plan and track outcome items. (2.5) Plan iteration 0813 (.5) Report status to Terri Wed and Fri (1)	Garry Booker	4	3	8/4/2008 8:49 AM	Garry Booker	Ready		
0806-Learn	Updated stakeholder list. IT Biz Systems, Developers, BLs, managers, ... more to come. Keep filling journal.	Garry Booker	6	1	8/4/2008 10:22 AM	Garry Booker	Waiting		
0806-Lev0Pres	Level 0 presentation, 2nd draft...complete. -- < 30 minute duration. 100% practice. Little/no theory. No overview. Keep it short and focused on GTD core skill. (Scope changed 8/4)	Garry Booker	8	8	8/4/2008 10:56 AM	Garry Booker	InProgress		
0806-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.	Garry Booker	0	0	8/4/2008 8:31 AM	Garry Booker	Deleted		
0806-PilotSite	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. (e.g. Terri mentioned testing in production) Use task board like other projects.	Garry Booker	16	8	8/4/2008 8:50 AM	Garry Booker	Waiting		
0806-WellListDiff NEW	Top Priority!! Done = List of differences between two well lists, with recommended action to resolve	Garry Booker	8	8	8/4/2008 11:11 AM	Garry Booker	Ready		

New outcome item

New burndown chart

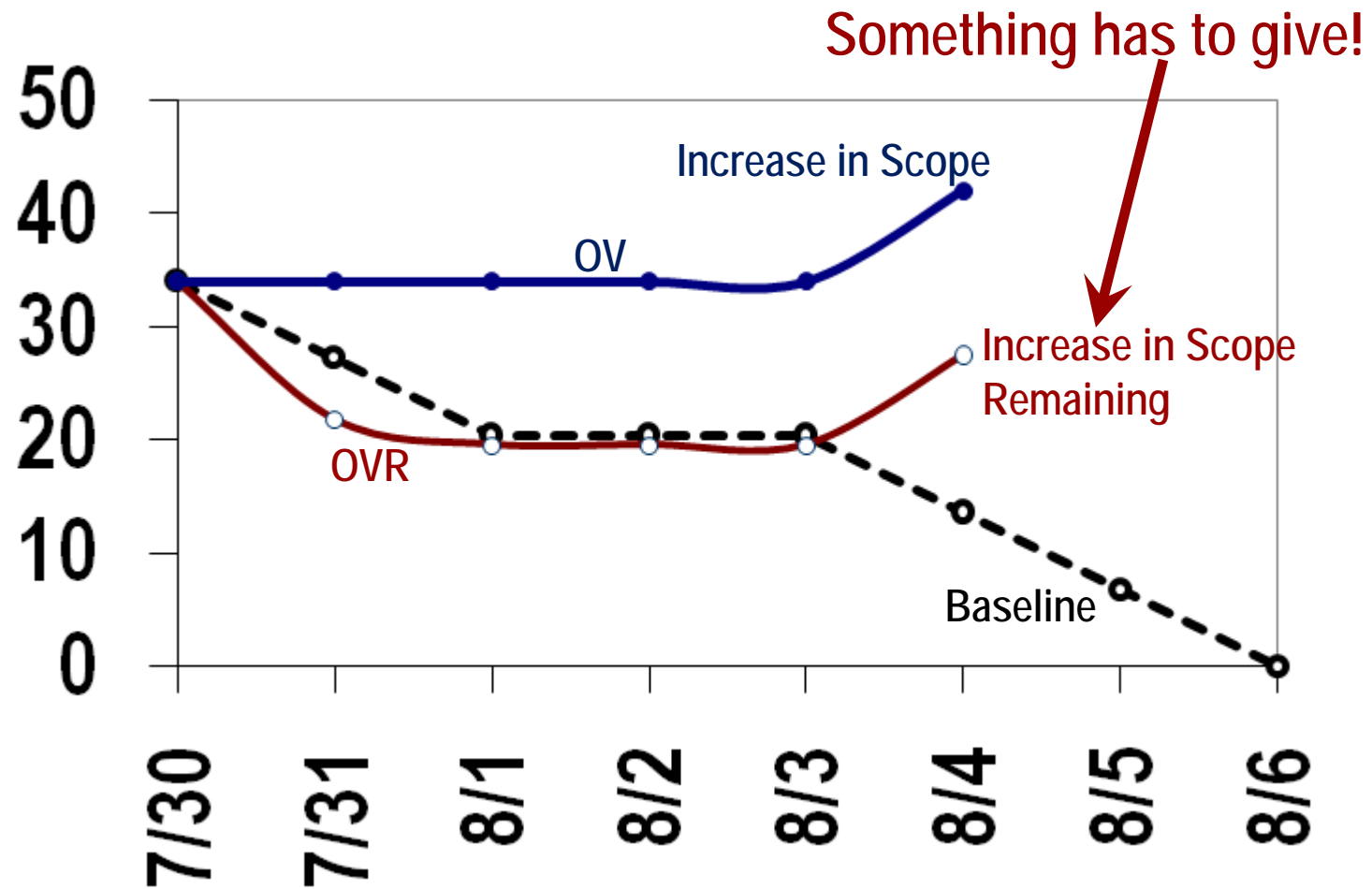


My Burndown Chart



[View slide show](#)

Rapid Scope Change

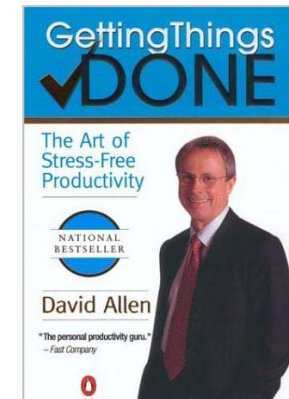


Rapid Scope Change

- **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