Advanced Scope and Change Management Techniques

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Agenda

1. What is Virtual Lunch & Learn
2. Your Expectations from this Webinar
3. Introduction – Myself
4. Advanced Scope and Change Management Techniques
   a) Scope/Change Management Overview
   b) Requirements Traceability Matrix Overview
   c) Advanced Change Management
   d) Change Register/Log
   e) Maintaining the Scope Baseline
   f) Scope/Change Management Benefits and Challenges
5. Upcoming Learning Opportunities from RefineM
6. How to get 1 PDU for this Webinar?
7. Rewarding Our Star Attendees
8. Q & A

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RefineM's Virtual Lunch & Learn

This is a monthly webinar delivered during the lunch hour in the first week (Wednesdays) of every month.

This month it is on Monday.

It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.

The monthly webinars will cover a variety of Project Management / Agile topics.

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Your Expectations

What are your expectations from this webinar?
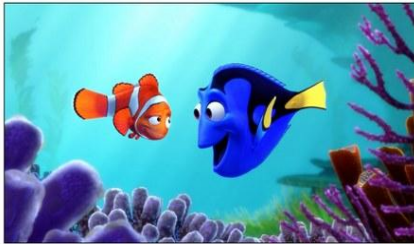
Why are you here today?

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Helping organizations turn their project management capability into a *competitive advantage*

My professional journey b/f RefineM

* CEO/Consultant since Dec 2011
    * Agile Coaching/Adoption
    * Project Management/ Process Improvement Consulting and Training
    * Project Management Toolkits (for PMs, Executives and Agile Practitioners)

* 20+ years of Successful Project Leadership
    * Led 100s of projects of all sizes, successfully
    * Recovered many projects, saved millions of $
    * Implemented numerous process improvements
    * Coached/mentored 100s of PMs, and some executives
    * Board Member – SWMO PMI Chapter (2008-2014)

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Advanced Techniques in PM

1. Overview
2. Advanced Stakeholder Management
3. **Advanced Scope/Change Management**
4. Performance Measurement Using EVM
5. Advanced Risk Management

What else do you consider advanced skills?

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Who Can Use These Techniques?

* Experienced project managers

* May or may not have a certification such as PMP®

* PMO leads / directors looking for training for PMs

* PMs looking to take on greater leadership role

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Advanced Scope and Change Management

- Scope/Change Management Overview
- Requirements Traceability Matrix
- Advanced Change Management
- Maintaining the Scope Baseline
- Scope/Change Benefits and Challenges

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Scope/Change Overview

* Scope/change management is critical to project success

* Scope creep can cause:
  - ✓ Delays
  - ✓ Cost overruns
  - ✓ Customer dissatisfaction

* Basic scope and change management starts with the WBS

How to go beyond?

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Requirements Traceability Matrix

* Used to trace requirements back to their source

* Can tie requirements to:
  - ✓ Business and project objectives
  - ✓ Deliverables
  - ✓ Test cases
  - ✓ Many others

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RTM Example

Project XYZ - Requirement Traceability Matrix (RTM)										
Id	Requirements	Deliverables	Project Lead	Estimated Duration (Weeks)	Estimated Real Effort (Hours)	Date WBS Created	Date Schedule /MPP Created	Date Code Complete	Date Testing Complete	Date In Production
1	Requirements Set1									
2	Requirements Set2									
3	Requirements Set3									

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Benefits of RTM

∗ Maintain forward **and** backwards traceability
  - ✓ Forward traceability helps ensure the whole project is delivered
  - ✓ Backward traceability helps keep project delivery on track

∗ Ensures scope is complete
  - ✓ Nothing out-of-scope is included, **and** scope is not missing anything

∗ Makes tracking defects and changes easier
  - ✓ Effect of defects on other deliverables is easier to see
  - ✓ Changes can be compared to scope easier

Source: Kirinde, Ranmali (2016, 6 April). Why implement a requirements traceability matrix? *ProjectManagement.com.*

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RTM Disadvantages

* Takes a lot of time to maintain
  - ✓ Not just project manager's time—other team members too

* Takes a lot of training to maintain correctly
  - ✓ Especially with a large, complex project and medium to large team

* Risk of incorrect updating with manual process
  - ✓ Incorrect input results in incorrect data

Source: Kirinde, Ranmali (2016, 6 April). Why implement a requirements traceability matrix? *ProjectManagement.com.*

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What Should the RTM Include?

* Identification number for tracking
* Requirements information
* Deliverables / work packages
* Project Lead
* Test cases
* Dates:
  - ✓ Duration of work packages related to requirements
  - ✓ Completion date
  - ✓ Testing date
  - ✓ Deployment date

Source: Kirinde, Ranmali (2016, 6 April). Why implement a requirements traceability matrix? *ProjectManagement.com.*

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RTM Exercise

The RTM for a project is below.

1. **What could be the deliverables for 2.1-2.4?**
2. **How would you test 1.1 and 2.4?**
3. **Are there any other requirements you think the project team has missed?**

Requirement Traceability Matrix (RTM)

ID	Requirements	Deliverables	Test Cases	Project Lead	Estimated Duration (Weeks)	Estimated Real Effort (Hours)
1	**Ticketing System Updates**			Sandy		
1.1	*System must allow up to five registrations per session.*	*Tested code*		Lee	2	40
1.2	*System must accept coupon codes.*	*Tested/implemented coupon codes and functionality*	*1. Coupon codes accepted for matching products.* *2. Coupon codes not accepted for non-matching products.*	Phillip	2	40
2	**Website Updates**			Sandy		
2.1	*Website needs a way for users to subscribe to a mailing list.*			Lee	0.5	15
2.2	*Website needs a blog for updates about the event*			Phillip	0.5	15
2.3	*Website needs to link to registration system.*			Phillip	1	20
2.4	*The agenda needs to be included in PDF format.*			Lee	0.5	15

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RTM Exercise - Answers

Possible answers could include:

1. **Deliverables for 2.1-2.4:**
   1. **Mailing list (2.1), Operational blog (2.2), Registration system working (2.3), PDF agenda on site (2.4).**
2. **Confirm that up to five registrations work (1.1), try downloading the PDF (2.4)**
3. **Are there any other requirements you think the project team has missed?**

Requirement Traceability Matrix (RTM)

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Advanced Change Management

* Change Management can occur at the levels of:
  - ✓ Portfolio
  - ✓ Program
  - ✓ Project
  - ✓ Process

* Benefits projects by:
  - ✓ Tracking changes and their effect on the project
  - ✓ Preventing unauthorized/informal changes

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Change Register / Log

* Used to track changes in terms of:
  - ✓ What the change is?
  - ✓ When it was submitted?
  - ✓ Who submitted it?
  - ✓ How the change will impact cost and schedule?
  - ✓ Status of the change and reason for the status
    - ▪ Approved, rejected, submitted, on hold

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Change Register / Log Example

Change ID	Description	Submitted on	Submitted By	Cost Impact	Schedule Impact	Status	Status Date	Reason
CR-1	Implement a new section of the website.	4/2/2016	Fred K.	$5,000	7 days	Approved	4/4/2016	Change Control Board has approved the request.
CR-2	Implement a new website design.	4/2/2016	Fred K.	$10,000	14 days	Rejected	4/4/2016	Change Control Board rejected request due to resource allocation.
CR-3	Increase user acceptance testing by one week.	4/5/2016	Laura S.	$2,000	7 days	Pending	4/6/2016	Change will be reviewed 4/11/2016 at next Change Control Board meeting.
CR-4	Integrate social media posts.	4/5/2016	Robin L.	0	3 days	On Hold	4/6/2016	Change has been put on hold for more research.
CR-5								

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Maintaining Scope Baseline

∗ Scope baseline is one of the key baselines of a project
  ✓ Consists of work breakdown structure (WBS)
  ✓ Project scope statement
    ▪ Scope, deliverables, assumptions, constraints
  ✓ WBS dictionary
    ▪ Detailed deliverable, activity, and scheduling info for each part of WBS

∗ Other baselines are:
  ✓ Schedule baseline
    ▪ Approved schedule with baseline start, finish
  ✓ Cost baseline
    ▪ Approved, time-phased budget with management reserve

Source: PMBOK® Guide.

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Maintaining Scope Baseline - Steps

1. Start with the project charter
   - ✓ Deliverables, milestones, assumptions, constraints, high-level scope
   - ✓ Already seen and approved by stakeholders

2. Involve stakeholders
   - ✓ Easier to manage scope if it has already been approved

3. Measure variations between plan and actual
   - ✓ How many times has the scope changed?
   - ✓ How big is each change in terms of effort?
   - ✓ How have the changes affected time and cost?

Source: PMBOK® Guide.

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Variance Exercise
The change register for a project is below.

Change ID	Description	Original Cost ($)	Original Duration (Days)	Cost Change ($)	Schedule Impact (Days)
CR-1	Implement a new section of the website.	$10,000	14	$3,000	7
CR-2	Implement a new website design.	$10,000	20	$6,000	14
CR-3	Include more performance testing.	$2,000	3	$2,000	3
CR-4	Integrate social media posts.	$1,000	7	$250	3.5

1. **What is the new cost (in $) and duration (in days) for each requirement?**
2. **Based on the % change, are there any changes should be rejected or at least resisted?**

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Scope/Change Challenges

* Maintaining requirements traceability throughout

* Managing change requests from lots of stakeholders

* Making sure everyone is on board with scope

What are other challenges you've seen?

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Scope/Change Benefits

* Prevention of scope creep

* Greater transparency throughout project execution

* Time and cost savings, plus better quality assurance

Managing scope helps manage time and cost

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Conclusion

* Advanced scope / change management improves:
  - ✓ Traceability
  - ✓ Transparency
  - ✓ Accountability

* Like many advanced techniques, difficult to set up
  - ✓ Output is worth the effort
  - ✓ With scope under control, time and cost can be controlled more easily

Increase your project delivery success with advanced scope and change management

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More Training Opportunities From RefineM

Training Title	Springfield	Kansas City	St. Louis	Instructor-Led Online
Agile Fundamentals / Agile 101		May 04-05*	Oct 20-21	
PMI-ACP® Exam Prep		May 04-06*		
PMP® Exam Prep	May 09-12*			
Advanced Techniques in Stakeholder Management				May 19
Leadership Skills for Successful Teams	Aug 24	Oct 07	Jun 01	
Risk Management for Projects		Nov 14	Jun 01	
Leadership Skills for Project Managers	Sept 01*	Oct 06*	Jun 02*	
Advanced Techniques in MS Project		Jun 03		Aug 18-19
Is Quality Really Important?	Aug 19	Oct 03	Oct 20	
Project Management Fundamentals	Aug 25		Oct 19	
Lean 101	Aug 26	Oct 04	Oct 21	
Change Management	Sept 01	Oct 05	Oct 22	
Adv. Techniques in Risk Management				Sept 15

* Courses with red asterisk are guaranteed to run.
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Next Lunch and Learn

* ***Performance Measurement Using Earned Value Management***
  * ✓ How can EVM combine scope/schedule/cost management?
  * ✓ How can you use it to forecast future outcomes?
* ***Wednesday, June 1, 12:00-1:00 PM Central***

Register Today - Don't wait for the last Minute

How to Claim 1 PDU for this Webinar?

1. **Visit** ccrs.pmi.org and log in.
2. **Click** on "Report PDUs" link.
3. **Click** "Courses and Training" in upper left.
4. **Activity Name:** "Advanced Scope and Change Management Techniques" *(complete this first, before you go to #5)*
5. **Provider:** "RefineM LLC" *(don't select dropdowns)*
6. **Date started:** May 2, 2016
7. **Date completed:** May 2, 2016
8. **Contact person:** NK Shrivastava
9. **Contact phone:** (417) 763-6762
10. **Contact email:** Trainings@RefineM.com
11. **PDUs:** 1.00 Technical.
12. **Click** on the "I agree this claim is accurate" box and then Submit.

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Rewarding Our Star Attendees

* **Anyone who attends 3 Lunch and Learn Webinars in a row is a Star Attendee and is eligible for a prize drawing for a $10 Amazon gift card.**

There are no winners this month.
Stay tuned for our next drawing in June.

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Questions from Attendees

1. "What can we formalize up front in a change management plan/strategy that will give us leverage when it is time to apply the techniques during the project?"

2. "How do you overcome objections?"

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Questions?

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