Your Company Name

Managing Scope and Requirements Checklist

Date

Revision History

Date	Version	Author	Change

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Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select "Table Text" to restore the cells to the default value.

1   Purpose

Managing Scope and Requirements provides a checklist of numerous topics to help manage the scope and requirements for a project. The list works to gain customer agreement and scope creep that pushes out project completion and project costs.

Purpose describes the intent of the document, which is to provide a list to help manage scope and requirements.

This section includes the following information:

- *Project Name*
- *Product or system name.*
- *Functions associated with the product or system.*

2   Product or System Information

This section of the document should contain background information associated with the product or system.

2.1   Product or System Overview

Provide an overview of the product or system and the environment in which it is currently used.

- *Indicate the products, systems, databases, and processes that interface with it.*
- *Provide diagrams or examples, if necessary.*

2.2   Reason and Description

Provide a description and reason for the application, system or project, e.g.

- *New or modified process or need for certain information.*
- *Associated functions and processes.*
- *Tables and Databases involved.*
- *Special or unique processes, functions, fields or actions.*

2.3 Assumptions, Dependencies, and Constraints

List assumptions, dependencies, and constraints that could constrain the application, system or project, e.g., completion of a specific task, product or software availability or access.

2.4 Stakeholders

Provide information about who the Stakeholders are and their respective roles.

Name	Department	Role
John Smith	*Information Technology*	*Manager*

2.5 Risks

Provide information about any risks associated with the application, system or project, if any. Provide any work-around or mitigation information for each risk identified.

2.6 Implementation Dates

Provide a list of high-level tasks or deliverables and their associated target dates.

Tasks / Deliverables	Target Date

3   Checklist for Managing Scope and Requirements

Fill in the following table with the appropriate information.

Topic	Yes	No	Comments
Customer agrees with the scope of the project.			
Project scope has been documented and is measurable.			
The scope statement provides a meaningful baseline for ongoing management (i.e., it is clear when proposed changes are in or out of scope).			
The customer understands the importance of scope management?			
The scope statement been signed-off by the Customer and other Stakeholders and formally baselined.			
The scope is relatively stable.			
Confirmation has been obtained that commitments must be renegotiated and project work plans revised, as appropriate, whenever the approved scope changes.			
The project will maintain a profile of the software/hardware size over time for configuration items.			
Customer agrees with the requirements that will be addressed in the project.			
The requirements are clearly defined.			
Project includes a traceability matrix to show where each requirement is formally addressed.			
All requirements have been signed-off by the Customer and Stakeholders and formally baselined.			
Measurements are used to determine the status of the requirements (e.g., total number of requirements, changes that are proposed, open, approved, and included into the baseline).			
The requirements are relatively stable.			
Confirmation has been obtained that commitments, project plans, work products, and activities must be			

Topic	Yes	No	Comments
renegotiated and project work plans revised, as appropriate, whenever changes to the requirements are approved.			
Confirmation and approval has been obtained for significant requests for information or decisions from the customer or a member of the team.			
Decision requests are reviewed and completed by the customer in the time frame specified in the Project Plan.			
Decision requests are formally documented, tracked, and followed through to completion.			
Change requests are reviewed and finalized for all proposed changes to scope, requirements, deliverables, assumptions, responsibilities, and terms of acceptance, especially when there is no impact to the cost or schedule.			
Customer and Stakeholders review and finalize change requests in the time frame specified in the Project Plan.			
Change requests are formally documented, tracked, and followed through to completion.			

4   APPENDIX