Project Scope: Defining Your Area of Analysis

1 Day | Virtual and Face-to-Face

Scoping is the process of defining the boundaries of a product, program, project, or iteration. Depending on your viewpoint and your involvement in the project, the components within the scope you're analyzing may be slightly different; i.e. budget, time, resource, quality or features and functions; or stakeholders, interfaces, data flows, and processes. For purposes of this class, the viewpoint considered is from the business analysis perspective to identify the stakeholders (external agents or actors), interfaces, data flows, and high-level processes of concern in order to effectively determine the area for which analysis needs to be performed.

This course covers scoping techniques and best practices to ensure that you are eliciting and analyzing the right requirements based on the problem statement and that you have a framework for staying within the boundaries of the project. It also provides a technique to facilitate enough analysis so that requirements aren't missed, but aren't overdone either. The scope diagram provides a baseline and a primary reference for measuring all future project changes and project performance.

Participants also learn where AI may assist business analysis work, such as helping organize information, generate draft content, or review a work product. The emphasis is on using AI thoughtfully while building the judgment needed to evaluate and improve the results.

Interactive workshops allow students to practice the techniques as they learn. This course is taken as part of our 4-day Essential Skills for Business Analysis course and supports the standards outlined in both the *IIBA's BABOK®* and *PMI's PBA*.

Learning Objectives

- Identify why the project is being done (business drivers) in order to ensure the right analysis effort is being performed and so that requirements efforts can be appropriately prioritized
- Practice an approach to ensure that the problem your project is supposed to address is clearly understood
- Analyze and scope the area of analysis, collaboratively with project managers and business stakeholders, to clarify the level and complexity of the business analysis effort needed for the project
- Get an introduction to enterprise analysis in order to understand the project in the context of the greater organization's strategic goals
- Create a context data flow diagram to identify interfaces, data flows, and high-level processes associated with the project, that is valuable both for planning and communications purposes

Intended Audience

This course is designed for individuals of any discipline who are performing scoping activities; business analysts, project managers, business systems analysts, product managers, product owners, system architect, process engineers, requirements engineers, or any other project team member.

Prerequisites

None

Learning Topics

Introduction to Scoping

- Define solution or project scope and explain its applicability and purpose
- Identify the components of scope in both traditional and agile approaches
- Describe the value of scoping your area of analysis
- Evaluate the context of your project
- Assess a project within the larger context of the enterprise
- Identify the resources valuable to establishing project context
- Discuss how AI may help organize early scope information
- Review AI-assisted scope content for premature solutioning, missing context, and assumptions

Define Project Purpose

- Document Project Purpose
  - Document the current state
  - Study problems and opportunities in the organization
  - Differentiate business drivers from problem solutions
  - Clearly state business objectives
  - Perform stakeholder analysis
    - Develop personas to better understand stakeholder communities
  - Construct a project glossary and illustrate its value
- Distinguish and express key scope parameters and explain their importance:
  - Risks, assumptions, constraints, and dependencies
- Use AI to help draft or refine problem statements, objectives, stakeholder lists, personas, glossary terms, or scope parameters
- Review AI-assisted project purpose content to identify unclear business needs, solution-focused statements, missing stakeholder perspectives, weak objectives, and assumptions or constraints that require validation

Establish Boundaries

• Express scope with a graphical representation (Context Data Flow Diagram)
  ○ Identify external agents
  ○ Analyze and identify data flows
  ○ Distinguish the project boundary
• Complete scope with supporting documentation
  ○ Identify in-scope capabilities or processes
  ○ Analyze scope parameters for impacts on analysis planning
  ○ Document out-of-scope items
• Use AI to help identify possible external agents, data flows, and scope questions from a scenario
• Review AI-assisted scope models for missing interfaces, invented elements, unclear data flows, and incorrect boundaries

Finalizing Scope

• Compose a well-defined problem or opportunity statement
• Validate scope with stakeholders
  ○ Explain process of validating your area of analysis
  ○ Describe considerations when planning communications about scope
  ○ Explain the importance and describe an approach to gaining stakeholder agreement on scope
• Explain how scope is used throughout the project
• Understand the process for identifying and managing scope change
• Use AI to help review scope statements or prepare stakeholder communication
• Evaluate AI-assisted scope content before using it to support agreement or decision-making

Course Summary
• Bringing it all together • Develop an Action Plan with next steps on the student's current project
Appendix – Job Aids
• Tips for Ensuring Quality in the Context DFD • Risk Responses and Planning

This class is a part of the **B2T Training Business Analyst Certification Program**. For more information on the program, please see our Certification page.