Controlling Change to Scope and Requirements

Course Summary

Description

Establishing solid project baselines for scope, time, and cost and then using them as the basis for managing and reporting on the project are some of the most important tasks performed by any Project Manager. When done well, this work serves as a powerful driver for project success. However, this approach will only work if an effective change control process has been put into effect. Without change control, any project can spiral into disaster.

Controlling Change to Scope and Requirements provides two days of practical, hands-on training in the three primary approaches to project change control. Participants are shown how to set the stage for effective project control with a well written project charter, and then follow up with detailed scope statement, requirements documentation, schedule, and budget. Participants discuss how to establish project baselines, and then explore the details of formal change control. The benefits of change control on both project delivery and on the business value that follows the project are thoroughly examined.

The tools and techniques presented are field tested and have been proven to promote project success. The course format is truly multimodal with a mixture of exercises, group discussions, and lecture. All participants return to their workplace better equipped to bring their projects to a successful conclusion.

Topics

- Change control overview
- Change control with a product lifecycle perspective
- How change control supports project success
- Three primary change control strategies
- How to minimize the need for change
- Setting scope boundaries in a project charter
- Controlling the preliminary scope definition
- Defining scope, schedule and budget
- Importance of project baselines
- Baselines require solid project plans
- How to manage change when it occurs

- Implementing project change control
- The tools of change control
- Minimizing change through effective requirements management
- Managing stakeholder expectations about the impact of change requests
- Managing baselines
- How to embrace change when it adds value
- Evaluating change requests for value
- Quantifying value with an Opportunity Register
- Using the Opportunity Screen
- Change control success factors

Audience

This course is of special value to project managers who want a more complete understanding of project Change Control; experienced project managers who want to add to their toolkit of Change Control tools and techniques; functional managers with project responsibility who want to understand what they can do to uncontrolled change in their projects; and Project Management Office staff who want better management of change in their project portfolio.

Prerequisites

This course assumes that participants have participated in some projects and have some experience leading small projects or project teams. Prior PM training is helpful but not required.

Duration

Two days
14 PDUs

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Course Outline

I. Introduction
   A. The nature of project change
   B. Definition of change control
   C. Three primary change control strategies
   D. How change control supports successful delivery
   E. How change control protects post-project Business Value
   F. Other benefits of controlling change

II. Minimizing the Need for Change
   A. Initiation Phase
      1. How the Project Charter sets the stage for change control
      2. Defining business value and project objectives
      3. Setting preliminary scope boundaries
      4. Stakeholder buy-in to change control
      5. Impact of effective estimation
   B. Planning Phase
      1. Including the perspective of stakeholders
      2. Thorough project planning: Scope and Requirements
      3. Importance of the Work Breakdown Structure
      4. Value of a structured requirements process
      5. Developing verified and validated requirements
      6. The Scope Statement
      7. How definitive project baselines enable effective change control
      8. Planning for Transition to minimize last minute changes
      9. How effective risk management promotes control of change
      10. Business Value planning

III. Change Control Overview
   A. Developing a change control plan
   B. The work of change control

   C. Tools of change control
      1. Change request form
      2. Impact analysis
      3. Change control log
      4. The change authority

IV. Controlling Change When It Occurs
   A. Managing change to scope and requirements
   B. Defending the preliminary scope definition
   C. Negotiating to keep scope, time and cost in balance
   D. Sources of project change
   E. Managing change requests
      1. Using business value as a guide to change control
      2. Managing stakeholder expectations about the impact of change
      3. Negotiating scope, time and cost interdependencies
      4. Updating project documents
   F. Managing requirements
      1. Requirements change management
      2. Tracing as a change control tool
      3. Using the Requirements traceability matrix
   G. Dealing with mandates
   H. Change and risk
   I. Managing baselines
   J. Working with a vendor's change control system
   K. Challenges to the enforcement of change control
   L. Reporting project changes to stakeholders

V. Embracing Change
   A. Effective change control strategies
   B. Evaluating CRs for value
   C. Qualifying CRs with an Opportunity Register
   D. Evaluating CRs with an Opportunity Screen
   E. Selecting high value changes