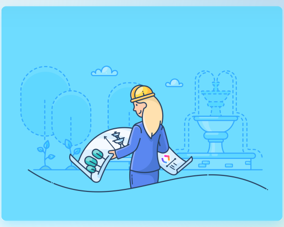


PROJECT MANAGEMENT

Developing a Project Scope for a Stronger Team Connection

Alex York
Senior Content Marketing Manager

December 2, 2022

14min read

In a perfect world, every project would start, stay, and finish on schedule and exactly as planned. All your team members would complete their tasks and deliverables ahead of time.

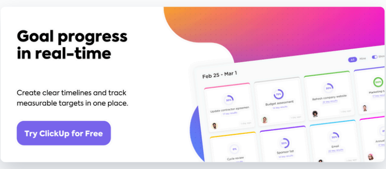
The budget would stay the same throughout the project. Stakeholders would be completely satisfied with the quality of your work.

We can certainly dream, but in reality, no project is perfect. Proper planning helps your team avoid common project management setbacks like missed deadlines and unexpected requests for additional work.

Minimize these hurdles by **defining your project scope** before starting any work. With clear expectations set and accountability in place, you and the client have a solid foundation to begin the project and prevent scope creep.

This guide walks you through how to build a strong project scope statement and provides some of the best resources to get started! Our project management templates and all-in-one productivity tools will help you supercharge how you manage and implement project scope.

Ready?


Goal progress in real-time

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What is Project Scope?

Project scope is a documented statement of **everything** that goes into making a project successful. It defines the complete scope of work and requirements for a project, explaining what's included and what isn't.

All of these specifications are recorded and stored in a project scope statement. And to put it simply, a **scope statement** assesses and outlines a project in its entirety before anyone even begins work. It provides a detailed breakdown of all the work that your project team will perform and establishes expectations on how and when that work will be completed.

A scope document serves as your **project blueprint**. It's an important step in project management because it consolidates all of the important information that key stakeholders should know.

A project scope document typically includes the following:

- **Project goals**: a high-level overview of your project objectives
- **Project stakeholders:** the people involved in the project
- **Resources allocated:** such as team members, budgets, and tech
- **Project constraints:** limitations of time, people, and costs that you must operate within
- **Timeline:** timeframes within which you must complete each part of the project
- **Deliverables:** the tangible results of your completed project
- **Exclusions:** What your project won't include, aka out-of-scope work

The Benefits of Defining Project Scope

Without a clearly defined project scope, your team can easily get lost. Your project scope protects your team from project failure and keeps you moving toward your end goals.

Here are some key reasons why defining project scope before starting any work is beneficial for your team:

- **Avoid scope creep:** Prevent work from expanding beyond its limits by clarifying exactly what's included and what isn't. Define project boundaries, and prevent your team from overextending, or burning out.
- **Establish guidelines for changes:** No one likes shifting project requirements, but it happens. Put processes in place on how to change the scope in a way that doesn't significantly and unexpectedly impact your team.
- **Keep projects on track:** Clear project timelines create accountability and keep your projects moving. It also establishes ways to measure your team's progress toward the goals via deadlines, milestones, and deliverables.
- **Manage expectations:** Keep your team, clients, and stakeholders all on the same page so everyone knows responsibilities, expected results, and critical due dates.
- **Reduce risk:** Listen and monitor potential risk factors like budget overspending or falling behind schedule. Awareness is essential to easily anticipate and avoid project failure.

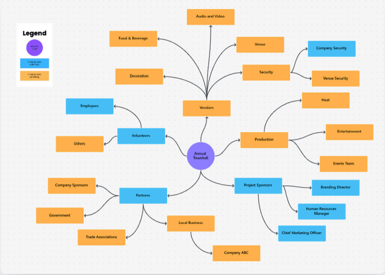
How to Write a Project Scope Statement in 7 Steps

Any small gap in your project scope leaves enough room for the project to veer off-course. That's why your project scope document needs to cover **all of the parameters stakeholders should know** about the project.

Here's how to write a comprehensive, clear project scope statement in seven simple steps:

1. Identify your stakeholders

Keep everyone on the same page by getting scope approval from all project stakeholders—everyone **who** has a say in how your project should go. This is the best project management process to ensure your scope statement is realistic and achievable.


Legend
Audio and Video
Food & Beverage
Venue
Company Security
Decoration
Security
Venue Security
Employees
Vendors
Host
Volunteers
Production
Entertainment
Ushers
Annual Townhall
Events Team
Company Sponsors
Partners
Project Sponsors
Branding Director
Government
Human Resources Manager
Local Business
Chief Marketing Officer
Trade Associations
Company ABC

Use ClickUp's Whiteboard feature to Identify your project's most essential stakeholders with this simple pre-built template

Create a stakeholder map to list all of the important people involved in the project to give yourself an idea of the people who can help you race toward project success. Luckily, ClickUp's Stakeholder Map template that makes stakeholder mapping and planning easy to organize!

Download Stakeholder Map Template

Identify all the stakeholders who make decisions that affect your project, including:

- **Internal stakeholders**: Team members, project managers, and executives
- **External stakeholders**: Clients, their customers or users, vendors, and investors

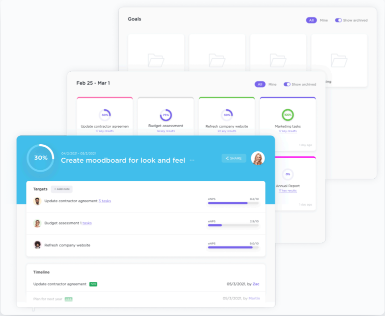
Involve these stakeholders throughout defining the project scope, so everyone is clear on what to expect from the project and how they can contribute to its success. Get their feedback, brainstorm ideas, and rework goals as necessary.

2. Clearly define your client's essential project goals

The word "project" might start with a "P," but every project actually starts with a "why." 😏

Clarifying your project objectives should be the first step in defining the project scope because it explains ***why*** the work is necessary.

Once you understand **why** the client is pursuing this project, you and your team know what they'll focus on when they evaluate your work. Tailor your deliverables based on these objectives, and there's a good chance the client will be happy.


Goals
All
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Show archived
Feb 25 - Mar 1
30%
Update contractor agreemen
17 key results
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Budget assessment
14 key results
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22 key results
100%
Marketing tasks
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30%
04/2/2021 - 05/2/2021
Create moodboard for look and feel
SHARE
Targets
+ Add note
Timeline

Update contractor agreement 3 tasks — eNPS 8.2/10

Budget assessment 1 tasks — eNPS 2.9/10

Refresh company website — eNPS 9.0/10

Update contractor agreement +2.5 — 05/3/2021, by Zac

Plan for next year +2.5 — 05/3/2021, by Martin

Stay on track to hit your goals with clear timelines, measurable targets, and automatic progress tracking

The project goals also shape your role as a strategic advisor. Beyond tangible deliverables, you can also offer tips on how clients can meet their objectives to win them over.

Ask yourself these questions to help define your goals:

- What outcomes are you hoping to achieve?
- How will project success be measured?
- Are there specific metrics or KPIs to track to benchmark performance?

Once you've set your speciifc goals, use them to help your team create high-quality work within scope. Clients—especially new or picky ones—may try to throw tasks your way or make suggestions that don't relate to the project's larger objective. Maybe they drag their feet on getting feedback to you on time.

Remind the client of your North Star objectives when problems crop up (and perhaps even before then). It's always a great idea to show how deliverables and tasks—if they're completed by their assigned due dates—work toward those goals!

And if needed, push back on last-minute client suggestions that don't align with their North Star by showing them exactly how their suggested changes might alter the project timeline.

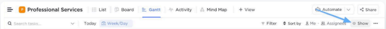
Professional Services
List
Board
Gantt
Activity
Mind Map
+ View
Automate
Share
Search tasks...
Today
Week/Day
Filter
Sort by
Me
Assignees
Show

TABLE OF CONTENTS

What is Project Scope?
The Benefits of Defining Project Scope
How to Write a Project Scope Statement in 7 Steps
1. Identify your stakeholders
2. Clearly define your client's essential project goals
3. Allocate resources to minimize burnout and boost profits
4. Pinpoint the exact deliverables your clients need
5. Determine any and all project constraints
6. Create a thorough and always up-to-date project timeline
7. Set a manageable and realistic scope management process
Example of a Project Scope Statement in Action
Additional Project Scope Templates to Get You Started

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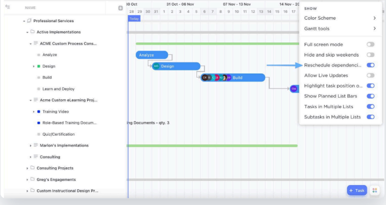
Get Started


Active Implementations
ACME Custom Process Cons...
Analyze
Design
Build
Learn and Deploy
Acme Custom eLearning Proj...
Training Video
Role-Based Training Docum...
Quiz/Certification
Marlon's Implementations
Consulting
Consulting Projects
Greg's Engagements
Custom Instructional Design Pr...
Analyze
Design
Build
Gantt tools
Full screen mode
Hide and skip weekends
Reschedule dependenci...
Allow Live Updates
Highlight task position o...
Show Planned List Bars
Tasks in Multiple Lists
Subtasks in Multiple Lists
+ Task

Reschedule dependencies to visualize the impact of due date changes on tasks within the Gantt view in ClickUp

By specifically showing a client the impact of a small or major change in the project, you give a non-bias view into what it does to the workflow. And we get it—some clients are picky.

Fortunately, you don't have to cave to random or last-minute demands by clearly showing the impact of requests and the best path to keep projects within scope and on track.

When writing your project goals, keep the SMART goals framework in mind. Define goals that are:

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**elevant
- **T**ime-bound

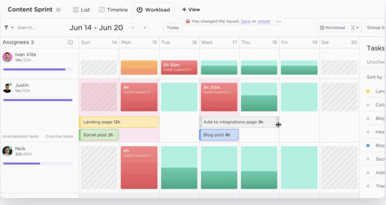
This will ensure that the scope of the project is **realistic** while setting up standards for evaluating its success.

3. Allocate resources to minimize burnout and boost profits

You can't decide what your team will work on until you know what resources are available. And unless you're playing Minecraft in creative mode, you don't have infinite resources.

Every company is limited by the size of its teams, budget, and tech.

Project scope involves resource allocation to ensure that your project has **enough team members,** all the **necessary tech,** and **the right budget** assigned to it to succeed. Resource allocation is essential to planning exactly **how** your team will complete your projects.


Content Sprint
List
Timeline
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+ View
You changed the layout. Save or reload
Search...
Jun 14 - Jun 20
Today
Workload
Group b
Assignees 3
Sun 14
Mon 15
Tue 16
Wed 17
Thu 18
Fri 19
Sat 20
Ivan Villa
18h/20h
2h 30m
OVER CAPACITY
Justin
1m/40h
4h
OVER CAPACITY
4h 30m
OVER CAPACITY
Landing page 12h
Add to integrations page 9h
Social post 2h
Blog post 8h
Unscheduled tasks
Overdue tasks
Nick
32h/60h
4h
OVER CAPACITY
Tasks
Sort by

Use ClickUp's Workload View to see who is ahead or behind and easily drag-and-drop tasks to reallocate resources

For project managers and team leads, it's essential to use workload management tools so team members don't spend too many hours on a specific client. It's also helpful to have a Workload View that can prevent one employee from working more or less than another.

Bonus:* *Resource planning templates

Your resources can be several different things as well. Some of the most commonly defined resources include:

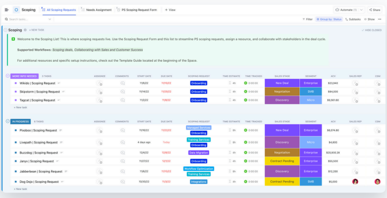
- **Team members:** Your team's total headcount, every member's assigned responsibilities, and the number of hours needed per week for each task
- **Tech:** What equipment, software, and tools do you need to complete this project
- **Project budget:** Client or internal project budgets, restrictions, or available pools

You have to work with what you've got—and a little planning goes a long way! Figuring out what resources you have available makes it easier for you to work within those guidelines.

Check out these team charter templates!

4. Pinpoint the exact deliverables your clients need

Now that you know what resources are at your disposal, you're ready to determine **what** the project will produce for your clients: deliverables. Your project scope document should clearly identify project deliverables so that your agency and its clients know exactly what will be created.


Scoping
All Scoping Requests
Needs Assignment
PS Scoping Request Form
+ View
Automate (1)
Share
Search tasks...
Filter
Group by: Status
Subtasks
Show
Scoping
+ NEW TASK
HIDE CLOSED

Welcome to the Scoping List! This is where scoping requests live. Use the Scoping Request Form and this list to streamline PS scoping requests, assign a resource, and collaborate with stakeholders in the deal cycle.

Supported Workflows: *Scoping deals, Collaborating with Sales and Customer Success*

For additional resources and specific setup instructions, check out the Template Guide located at the beginning of the Space.

MORE INFO NEEDED 3 TASKS	ASSIGNEE	COMMENTS	START DATE	DUE DATE	SCOPING REQUEST	TIME ESTIMATE	TIME TRACKED	SALES STAGE	SEGMENT	ACV	SALES REP	CSM
Wikido | Scoping Request			11/6/22	11/10/22	Onboarding	4h	0:00:00	New Deal	Enterprise	$23,940		
Skipstorm | Scoping Request			11/14/22	11/20/22	Onboarding	4h	0:00:00	Negotiation	SMB	$84,000		
Tagcat | Scoping Request			11/2/22	11/8/22	Onboarding	4h	0:00:00	Discovery	Micro	$9,561.60		

+ New task

IN PROGRESS 6 TASKS	ASSIGNEE	COMMENTS	START DATE	DUE DATE	SCOPING REQUEST	TIME ESTIMATE	TIME TRACKED	SALES STAGE	SEGMENT	ACV	SALES REP	CSM
Pixoboo | Scoping Request			11/16/22	11/22/22	Managed Services Onboarding	8h	0:00:00	New Deal	Enterprise	$8,074.80		
Livepath | Scoping Request			4 days ago	Today	Training Services Onboarding	8h	0:00:00	Discovery	Micro	$4,800		
Buzzdog | Scoping Request			12/4/22	12/8/22	Data Migration	4h	0:00:00	Negotiation	Enterprise	$20,930.28		
Janyx | Scoping Request			11/27/22	12/1/22	Onboarding	4h	0:00:00	Contract Pending	Enterprise	$55,500		
Jabberbean | Scoping Request			11/6/22	11/10/22	Workflow Optimization Training Services	8h	0:00:00	Discovery	Enterprise	$12,200		
Dog Dojo | Scoping Request			10/30/22	11/3/22	Integrations	4h	0:00:00	Contract Pending	SMB	$5,000		

+ New task

Confidently collaborate with clients and keep them happy with this unique template for professional services

Refer to your project goals when you're pinpointing your deliverables. Need help organizing them? Use the ClickUp Professional Services Template to fast-track your client onboarding process when determining exactly what needs to be delivered.

Download Professional Services Template

Your deliverables should serve as **stepping stones** toward fulfilling your project's higher purpose and satisfying your project requirements. What measurable results will your project deliver by its completion?

The set deliverables can be tangible or intangible for the project team. Project scope management can mean a lot of different things for various agencies, but some common examples of deliverables include:

- Blog posts, case studies, and whitepapers
- Reports
- Consultations
- Audits
- New feature or product
- Training program to teach employees how to use a new software

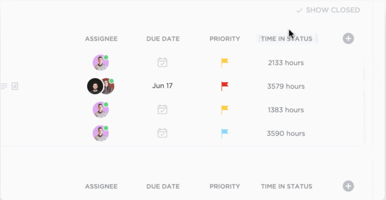
5. Determine any and all project constraints

So you know what your project is, but what about **what it's *not***? And what about the **risk factors** that could cause your project to fail? An important—yet often ignored—step of scope drafting is defining these project constraints and exclusions.

Constraints are **factors that limit your project**, like:

- Time limits, due dates, and deadlines
- Costs for various parts of the project vs. the allocated project budget
- Scope creep and changes to the previously-agreed-upon scope of work

Exclusions are the **deliverables that *aren't* part of the project!** What are the tasks that you specifically **don't want to** or **can't** do?


SHOW CLOSED

ASSIGNEE	DUE DATE	PRIORITY	TIME IN STATUS
			2133 hours
	Jun 17		3579 hours
			1383 hours
			3590 hours

ASSIGNEE	DUE DATE	PRIORITY	TIME IN STATUS

Use Time in Status to identify any bottlenecks and automatically receive a related notification in ClickUp

For example, you might specify that your social media marketing team won't be responsible for scheduling the posts they create. By cutting out time that would otherwise be spent on social media management, your team can focus on their areas of expertise: strategy and content creation.

Knowing what you're not going to be focusing on will keep you focused on what matters most! This means you can prioritize the deliverables that will help your client reach their project goals.

With these boundaries, you and your team members don't need to do whatever a client asks for. You can decide as an agency how to spread your time and energy across specific clients. Allocate your resources more effectively, instead of attempting too much and risking overwork (and burnout).

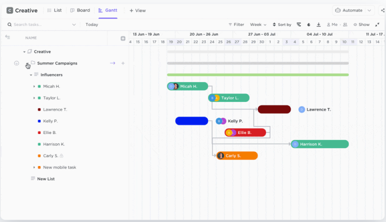
Setting solid boundaries for your project managers or team members, which will in turn set them up for success! Happier employees, happier clients—and less chance of project failure!

6. Create a thorough and always up-to-date project timeline

If project deliverables are the "**what**" of a project, then your project timeline is the "**when**." Your project scope should include a chronological breakdown of the events and tasks involved in your project.

This creates milestones that your team should hit by specific deadlines in order to make progress toward your goals. Your project scope statement doesn't need to have a granular, day-by-day schedule for every small task. However, it should include:

- Start and end dates for the project
- List of main tasks involved in your project
- Due dates for those tasks
- Amount of time necessary to complete each task
- Task dependencies that may block the milestones above


Creative
List
Board
Gantt
+ View
Automate
Search tasks...
Today
Filter
Week
Sort by
Me
Show
NAME
13 Jun - 19 Jun
20 Jun - 26 Jun
27 Jun - 03 Jul
04 Jul - 10 Jul
11 Jul - 17
Creative
Summer Campaigns
Influencers
Micah H.
Taylor L.
Lawrence T.
Kelly P.
Ellie B.
Harrison K.
Carly S.
New mobile task
New List

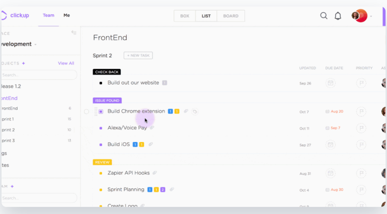
Showing more items such as assignees, due dates, and more in Gantt view's sidebar

Your project timeline helps your team **visualize the big picture** of your project and how its components affect each other. It keeps your team on track and grants visibility into any bottlenecks.

7. Set a manageable and realistic scope management process

You know what they say—the best-laid plans of mice and men often go awry. Despite your excellent project plan, your project **will** change course along the way.

Even the best project scope management teams will be subject to changes due to factors like budget cuts, employee turnover, and additional requirements. While your project scope statement should prevent out-of-scope work, sometimes, scope change is inevitable.


clickup
Team
Me
BOX
LIST
BOARD
FrontEnd
Sprint 2
+ NEW TASK
CHECK BACK
Build out our website
ISSUE FOUND
Build Chrome extension
Alexa/Voice Pay
Build iOS
REVIEW
Zapier API Hooks
Sprint Planning
Create Logo
UPDATED
DUE DATE
PRIORITY

Use the multitask management feature in ClickUp when you need to make several project changes at a time

Here's how you can set up a project scope management plan that can help you control scope creep:

- **Set limitation**s: The number of times you'll change certain things
- **Assign team members**: Set the points of contact to coordinate the changes
- **Establish processes**: Ensure change requests are subject to approval by all relevant stakeholders
- **Budget time and resources**: Prepare for multiple rounds of changes

Finally, after everyone has had a chance to review, it, get your scope statement signed by all stakeholders. Make sure everyone has a copy to refer to after the project kicks off.

Additionally, you can adopt a project management methodology like Agile or Scrum, both of which were built to deal with any sudden scope change!

Related:* *How to Write a Project Proposal

Example of a Project Scope Statement in Action

You're Jane, a manager at a marketing agency, and you've been tasked with running a content marketing campaign for Sugar-O's, a new cereal your client is about to launch. **Sweet**!

Your first order of business is to define the scope of your project. Your project scope example could look like this:

Project goals

Increase brand awareness of Sugar-O's by creating content marketing articles highlighting its value, namely, its health benefits and oh-so-delicious taste that's loved by kids and adults alike.

Project stakeholders

Defining scope for the entire team will help the project planning process. Definitely project requirements to your stakeholders, and try to list everyone out like this:

Name	Role	Responsibilities
Jane	Project Manager	Keep the project's scope on track
Susan	Customer Success Manager	Communicate with clients on project requirements
Mary	Content Marketing Manager	Research and write blogs
Jeri	VP of Marketing	Approve and provide feedback on the project's scope
Ray	SEO Specialist	Find high-value keywords, write briefs, and provide feedback

Resources allocated

- One CMM, 30 hours of work per week for four weeks
- One CSM, five hours of work per week for four weeks
- One PM, two hours of work per week for four weeks
- One editor, five hours of work per week for four weeks
- One copyeditor, five hours of work per week for four weeks
- Budget: $10,000

Deliverables

- Four (4) ready-to-publish content marketing articles optimized for SEO (1,500–3,000 words each)

Constraints

- Client feedback must be given within one week of delivery
- Client holiday schedule if reviewers are out of the office

Timeline

- Project start date: October 1
- Susan arranges a kick-off call for October 1
- Ray delivers SEO briefs to the agency by October 14
- Mary delivers the first article by October 21
  - Client feedback on the first article by October 28
  - Final revisions delivered by November 1
- Mary delivers the second article by October 28
  - Client feedback on the second article by November 4
  - Final revisions delivered by November 7
- Mary delivers the third article by November 4
  - Client feedback on the third article by November 11
  - Final revisions delivered by November 14
- Mary delivers the fourth article by November 11
  - Client feedback on the fourth article by November 18
  - Final revisions delivered by November 21
- Sugar-O's publishes all articles by November 30

Exclusions

- No graphic design
- No more than one round of revisions per article

Related:* *Project Management Triangle

Additional Project Scope Templates to Get You Started

Writing a project scope document isn't easy, but you don't have to start from scratch. Check out our free project scope templates to help you **solidify your project planning ASAP.**

ClickUp Scope of Work Template

ClickUp Scope of Work Template

Try ClickUp's Scope of Work Template to document deliverables, due dates, milestones, and more

Need to build a project scope document quickly? ClickUp's scope of work template helps you do just that by providing space to outline the key elements:

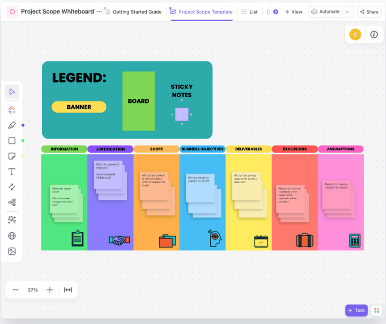
- Project Overview & Objectives
- Task List
- Project Milestones
- Project Meetings
- Project Status Report
- Project Approval

With this template, you can break down your project into **smaller, achievable tasks**. This document sets expectations by building a timeline that establishes accountability for your project deliverables.

It also includes a space for stakeholders to sign off on the project scope, so everyone knows that the work outlined in the document has been seen and approved.

Download Scope of Work Template

ClickUp Project Scope Whiteboard Template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Getting Started Guide
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View
Automate
Share
LEGEND:
BANNER
BOARD
STICKY NOTES
INFORMATION
JUSTIFICATION
SCOPE
BUSINESS OBJECTIVES
DELIVERABLES
EXCLUSIONS
ASSUMPTIONS
37%
Task

Visually build out a clear path to project success from kickoff to delivery

Who doesn't like **a pop of color**? This project scope template organizes all of your important project components on a bright, clean whiteboard.

You can easily define your need-to-know details while visualizing what elements still need more information. Scope your project in its entirety: create your business objectives, define deliverables, and log project exclusions and assumptions.

Jot down info by adding sticky notes, then drag them between columns and all around the whiteboard in whatever way makes sense to you. ClickUp's project scope whiteboard template sorts information into the following columns:

- **Information** about what the project is and its main purpose
- **Justification** of why the project is important
- **Scope** of what tasks should or shouldn't be included in the project
- **Business objectives** that define the goals
- **Deliverables**, aka what outputs will be produced
- **Exclusions**, work outside of the project scope
- **Assumptions**, or a list of needed resources for the project

Make these columns your own! You can add new ones, remove existing ones, and change them around to best suit your needs! This template is completely customizable to fit your workflows.

Download Project Scope Whiteboard Template

Manage Project Scope and More in ClickUp

Drafting your project scope statement is just one of the first steps in project management. Once you have the blueprint, you have to actually **build, achieve, and deliver.**

Every successful team needs the right tool to help them with that process, and there's no project management software better than ClickUp. In fact, ClickUp is the world's leading project management tool! It's got all the features you need to execute your dream project! Here's how:

- Break down your project into achievable action items with Tasks, Subtasks, and Checklists
- Document everything in rich text with ClickUp Docs, including your project charter, project scope, and requirements
- Stay informed on what everyone's working on and manage resources with Box view and Pulse
- Communicate with stakeholders and assign comments via Chat

- Prioritize work and ensure that tasks are always completed in the right order with Priorities and Dependencies
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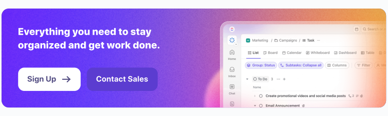
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