Formalizing the Project Goals
Initiate

Assess Feasibility

Plan

Formalize Goals

Define Schedule

Define Costs

[Obtain Approval]

Change Control & Configuration Management

Execute & Monitor

Collect Outputs

Develop

Kick Off Activities

Close

Collect Outputs

Release

Monitor Goals, Cost and Schedule

Quality Management

Risk Management

Human Resource Management
Formalizing the Project Goals

- Defining the project goals (project scope) is one of the first and most important activities in a project.

- The project scope:
  - Ensures that the project includes all and only the work necessary.
  - Establishes a baseline of the work to be performed.
  - Defines a reference document for project acceptance.

- The definition of the project scope starts during the feasibility study.

- The project goals and the alignment of a project with its scope continues throughout the lifecycle of a project.
The project scope is fixed in the project scope document, which contains:

- **Project goals and requirements**, which describe what we intend to achieve with the project and the main characteristics of the project and its outputs

- **Assumptions and constraints**, which describe the conditions which have to be met for the project to succeed

- **Project outputs and control points**, which describe the outputs of the project, and in some cases, a rough timing of their delivery
Project Goals and Requirements

• The project goals and requirements are the basis to define:
  – The baseline work to be performed (compare Work Breakdown Structure and Change and Configuration Management)
  – The project acceptance criteria (compare Project Closing and Quality Management)

• Strictly related to the software requirements

• Sometimes useful to include also what is outside the scope of a project
Project Objectives/Goals

Make the objectives **SMART**!

- **Specific**
  - Clear and concise

- **Measurable**
  - Easy to obtain measure to understand whether the goal has been reached. Maybe a date or a number, or a formula (but keep it simple!)

- **Agreed-to**
  - Goals must be specific enough that the team can agree on being able to reach them

- **Realistic**
  - Goals must be realistic. Unrealistic goals set unrealistic expectation and make the team apathetic.

- **Time-bound**
  - Must have a begin and an end. If no end can be set, are you sure we are not talking about operational work?
Project Objectives/Goals

Make the objectives ... **russian** (MoSCoW)!

- **M**: Must Have
  - essential

- **S**: Should Have
  - important, but we can do without

- **C**: Could Have
  - desirable

- **W**: Won’t Have
  - we will not do them (next iteration)
Project Objectives/Goals

• Try and make sure **class M success criteria** depend on factors under your/or the project’s control

• Negative examples (M not under control of the PM):
  – The system will have 1,000 users in the first month.
    (What tools does the PM have to ensure achievement of this goal?)
  – The data entry speed of users will increase tenfold.
    (How can the PM ensure the tenfold increase is actually achieved?)

• ... Sometimes a matter of wording. The consequences might be costly, nevertheless.
Assumptions

- **Assumptions** are conditions which are considered to be true, but might not in fact be

- Assumptions are not under the control of the project manager, but *they might be under the control of some project stakeholders*

- When this is the case, assumptions can be used to define duties and obligations of project stakeholders

- **Constraints** are known limitations. They explain why we set some goals and not others and why we structure the work in some way rather than another.
Project Outputs (Milestones and Deliverables)

- The project outputs define what a project will accomplish and when

- **Milestone**: a significant event in the project
  - Identify critical points in the project and in the schedule
  - Often used at “review” or “delivery” times
  - Can be tied to contractual terms, calendar constraints, deliverables

- **Deliverable**: a unique, measurable, and verifiable work product
  - Can be internal or external
  - Can have different dissemination and formality levels
  - In Gantt charts they often interconnect tasks (the output of task is a deliverable which is the input of a subsequent activity)

... in current practice often milestone and deliverable are used interchangeably (both used to identify products - milestones may represent key-products)