Instruction Guide: How to Complete the Project Scope and Plan

PURPOSE OF THIS GUIDE

The Instruction Guide by Anova Edu is an extension of the Project Scope and Plan Template. It helps the user complete the project scope and plan template in a clear, practical, and delivery-focused way. The document should define what the project is, why it exists, what will be delivered, how it will be managed, and what conditions must be in place for successful execution.

A strong project scope and plan is specific, realistic, and easy to understand. It should prevent ambiguity, reduce unnecessary detail, and support alignment between stakeholders before work begins.

PROJECT PLAN/PROJECT NAME

This is the title of the project plan and should clearly identify the project. Use a concise and professional project name that is easy to reference in meetings, approvals, and reporting.

Do:

- Use the official project name where one exists.
- Keep the title short, clear, and specific.
- Ensure the name matches other project documents.

Don’t:

- Use vague titles such as “General Project Plan.”
- Include internal jokes, codes, or overly creative wording.
- Change the project name inconsistently across documents.

1. INTRODUCTION

Purpose of the Plan

Explain why this document exists and what it is intended to achieve. State whether it serves as a planning document, approval document, delivery guide, or contractual reference.

Do:

- Explain the practical role of the plan.
- Clarify who will use it and for what purpose.
- State that this document sets out the agreed purpose, scope, and direction of the project.

Don't:

- Repeat the project description word for word.
- Write a long strategic essay.
- Use unclear language such as "for general information."

Background

Describe the context that led to the project. Include the business need, problem, opportunity, or trigger that made the project necessary.

Do:

- Explain the current situation and why action is needed.
- Mention any relevant history or previous work.
- Keep the background brief but meaningful.

Don't:

- Include unrelated organisational history.
- Over-explain facts that do not affect the project.
- Turn this into a full project narrative.

Project Approach

Describe how the project will be delivered at a high level. State the main method, delivery style, or implementation model.

Do:

- Mention whether the project will be phased, iterative, or sequential.
- Explain the general delivery logic.
- Align the approach with the project type and complexity.

Don't:

- Add detailed task lists here.
- Describe every activity in operational detail.
- Use abstract language without explaining how delivery will happen.

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2. GOALS & OBJECTIVES

Business Goals

State the broader organisational goals the project supports. These are the outcomes the organisation wants to achieve, not the tasks of the project itself.

Do:

- Link the project to strategic priorities.
- Write goals in business language.
- Keep them high level and outcome-focused.

Don't:

- Write activities instead of goals.
- List too many goals.
- Make goals so broad that they cannot be connected to the project.

Project Objectives

Define what the project itself must achieve. These should be specific, measurable, and time-bound where possible.

Do:

- Make objectives concrete and testable.
- Use clear outcome-based language.

- Include success indicators where helpful.

Don’t:

- Write vague statements such as “improve processes.”
- Confuse objectives with activities or deliverables.
- Include objectives that cannot realistically be measured.

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3. SCOPE

Scope Definition

Define exactly what is included in the project and what is excluded. This is one of the most important sections in the document because it prevents misunderstanding and scope creep.

Do:

- State in-scope and out-of-scope items clearly.
- Be precise about boundaries, deliverables, and limits.
- Include assumptions that affect the scope if relevant.

Don’t:

- Leave room for interpretation.
- Add unrelated future ambitions.
- Use broad wording that can be read in multiple ways.

Costs, Benefits and Risks

Summarise the main cost implications, expected benefits, and major risks at a high level. This section should provide a clear overview, not a detailed budget analysis.

Do:

- Highlight major financial considerations.
- Summarise expected value or benefits.
- Identify key risks linked to scope and delivery.

Don’t:

- Insert a full budget here if it belongs in the appendix.

- Re-list every risk in detail if a table already covers it.
- Make unsupported claims about benefit or return.

Risk Table

List the main risks that could affect delivery, along with their impact, likelihood, and mitigation measures.

Do:

- Include only meaningful project risks.
- Make mitigation actions practical and specific.
- Update the table as the project evolves.

Don't:

- List trivial issues that are not real risks.
- Write generic mitigation such as "monitor closely" without action.
- Confuse risks with issues already happening.

Deliverables

List the outputs the project will produce. Each deliverable should be clearly named and linked to a stage or responsible owner where relevant.

Do:

- Describe tangible outputs or completion points.
- Make deliverables specific and verifiable.
- Link deliverables to the project timeline.

Don't:

- List tasks instead of outputs.
- Use vague phrases like "support implementation."
- Include too many small items that are not true deliverables.

Milestones

Identify key checkpoints that show progress and mark important decisions, approvals, or completion points.

Do:

- Choose milestones that matter for delivery control.
- Keep them limited and meaningful.
- Use them to show progress through the project.

Don't:

- Turn every task into a milestone.
- Use dates without explaining what the checkpoint means.
- Confuse milestones with deliverables.

Impacted Business Areas

Identify which departments, teams, functions, or stakeholders will be affected by the project and how.

Do:

- Name the groups directly impacted.
- Briefly describe the nature of the impact.
- Consider operational, technical, and process effects.

Don't:

- Assume the impact is obvious.
- List only one team if others are also affected.
- Write general statements such as "the organisation."

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4. Assumptions

List the conditions that are expected to remain true for the project to proceed as planned.

Do:

- Include assumptions that affect time, cost, resources, or approvals.

- Keep each assumption realistic and clearly worded.
- Distinguish assumptions from facts.

Don’t:

- Use this section to hide risks.
- Include wishes or hopes instead of assumptions.
- Overload the section with minor details.

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5. CONSTRAINTS

Constraints

Describe the limits within which the project must operate. These may include budget, time, staffing, systems, policy requirements, or external dependencies.

Do:

- State the key boundaries clearly.
- Explain how the constraint affects delivery.
- Focus on constraints that materially shape the project.

Don’t:

- List every minor inconvenience.
- Repeat assumptions without distinction.
- Treat preferences as constraints unless they are firm limits.

Related Projects

Identify other projects that may affect, overlap with, or depend on this project.

Do:

- Name projects that create coordination needs.
- Explain the relationship briefly.
- Note timing or integration dependencies where relevant.

Don’t:

- Include unrelated projects for completeness.

- Write long descriptions of other initiatives.
- Ignore projects that may affect resources or sequencing.

Critical Dependencies

Describe tasks, approvals, inputs, or external events that must happen before the project can move forward.

Do:

- Identify dependencies that could delay delivery.
- Clarify what is needed and from whom.
- Use dependency language clearly and specifically.

Don't:

- Treat internal tasks as dependencies unless they truly are.
- Leave dependency ownership unclear.
- Ignore external approval or procurement dependencies.

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6. QUALITY MANAGEMENT

Reviews and Walkthroughs

Explain how outputs will be reviewed and validated during the project.

Do:

- Identify review points and review owners.
- State what will be checked and by whom.
- Align reviews with project stages.

Don't:

- Assume quality will happen automatically.
- Use generic language without review criteria.
- Describe only final review if interim checks are needed.

Tools and Techniques

List the tools, systems, or methods used to support project quality.

Do:

- Mention relevant software, templates, checklists, or methods.
- Keep the list practical and usable.
- Ensure tools support the actual work being delivered.

Don't:

- Include tools that are not actually used.
- Turn this into a technology inventory.
- Overstate the importance of tools over process.

Test Approach

Explain how outputs, processes, or solutions will be tested or validated.

Do:

- Match the test approach to the type of project.
- Explain what will be tested and against what standard.
- Include user testing, technical testing, or validation where relevant.

Don't:

- Include vague phrases such as "testing will be done."
- Overcomplicate the method.
- Use a test approach that does not fit the project.

Quality Standards

State the acceptance criteria or standards that define a successful output.

Do:

- Make standards clear and observable.
- Link them to the project objectives or requirements.
- Use measurable language where possible.

Don't:

- Use subjective language such as "high quality" without definition.
- Leave standards open to interpretation.

- List standards that cannot be checked.

Roles

Define who is responsible for quality-related tasks and decisions.

Do:

- Identify review, approval, and sign-off roles.
- Make responsibilities clear.
- Ensure accountability is visible.

Don’t:

- Duplicate roles without purpose.
- Leave decision-making unclear.
- Assume everyone understands who owns quality.

Training

Describe any training needed to ensure people can use the deliverables or follow the new process.

Do:

- State who needs training and on what.
- Link training to adoption and handover.
- Keep it realistic and proportionate.

Don’t:

- Include training as a formality if none is needed.
- Write a long training curriculum here.
- Confuse training with general communication.

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7. PROJECT MANAGEMENT APPROACH

WBS and Timeline

Outline the main work phases and how the project will progress over time.

Do:

- Show the main work breakdown at a high level.
- Present a logical sequence of activities.
- Align the timeline with major deliverables and milestones.

Don’t:

- Include a detailed task list in this section.
- Make the timeline unrealistic or overly exact too early.
- Ignore dependencies between work packages.

Estimation Basis

Explain how time, effort, or cost estimates were developed.

Do:

- State whether estimates are based on experience, similar projects, vendor input, or work breakdown.
- Mention the level of confidence if helpful.
- Keep the explanation transparent.

Don’t:

- Present estimates as fixed facts if they are still provisional.
- Hide assumptions behind the numbers.
- Use unsupported figures.

Resource Plan

Describe the people, tools, and facilities needed to deliver the project.

Do:

- Identify key roles and resource needs.
- Mention capacity constraints if relevant.
- Keep the plan aligned with scope and timeline.

Don’t:

- List names if roles are still uncertain unless required.

- Overcommit resources not available to the project.
- Treat this as a staffing directory.

Project Standards

Explain the rules or governance principles the project will follow.

Do:

- Reference reporting, approval, documentation, and decision-making standards.
- Keep the standards clear and practical.
- Align with organisational policy where relevant.

Don't:

- Overload the section with policy language.
- Repeat quality standards already covered elsewhere.
- Include rules that the team cannot realistically follow.

Roles and Responsibilities

Define who does what in the project.

Do:

- Assign responsibilities clearly.
- Use a simple format if possible.
- Make accountability visible for core activities.

Don't:

- Leave responsibilities shared by default.
- Use titles without explaining their role.
- Create overlapping ownership without clarification.

Change Management

Explain how changes to scope, time, cost, or deliverables will be managed.

Do:

- State the process for requesting and approving changes.
- Identify who can approve changes.

- Explain how changes will be recorded and communicated.

Don’t:

- Allow changes to happen informally.
- Assume scope changes are rare enough not to document.
- Use a process so complex that it cannot be followed.

Communication Plan

Describe how the project team and stakeholders will stay informed.

Do:

- State meeting frequency, reporting lines, and key audiences.
- Include major communication channels.
- Make the plan appropriate to stakeholder needs.

Don’t:

- Write “communication as needed” without structure.
- Overcomplicate with too many channels.
- Forget executive or sponsor communication.

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8. APPROVALS

This section records formal agreement that the plan is accepted and can proceed.

Do:

- Include the required approvers and sign-off date.
- Ensure the right authority levels are represented.
- Use this section to confirm alignment before execution begins.

Don’t:

- Leave approvals informal if formal sign-off is required.
- Include people who have no decision-making authority.
- Sign off before the scope is understood and agreed.

APPENDICES

Use appendices for supporting material that would interrupt the readability of the main plan.

Do:

- Place detailed documents, charts, registers, or lists here.
- Reference them clearly in the main body.
- Keep the main plan focused and readable.

Don't:

- Hide essential information only in the appendix.
- Add attachments that are not relevant.
- Duplicate material already explained in the main sections.

The following detailed supporting documents are available as premium companion resources to support project execution:

Available Anova Edu Appendices (Order Separately):

- **Work Plan** – Detailed task breakdown and Gantt chart
- **Risk Assessment** – Comprehensive risk register with RAG status
- **Execution & Controlling Checklist –** Monitoring of project requirements
- **Budget Estimation Template**– Cost breakdown, cashflow, and variance tracking

To purchase these appendices or access the full Anova Edu project toolkit, contact: Asha Roosberg, Lead Consultant at info@anovaedu.org.