

# 53 questions to identify your project's true scope early - and avoid crises later!



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## Checklist for an early scan and evaluation (broad but high level) of possible impact drivers

**Why:** The more accurate the original scope statement and risk identification, the lower the risk of missed solution components, stakeholders or effort/cost/schedule drivers

**How:** rapid-fire discussion meeting with core group of project/solution experts/visionaries, then drill deeper as required, to understand what to include in scope or in assumptions/risks

**Areas to explore:** business, people, technology, organization, environment

**Ask these questions:**

- Will this aspect require work/costs? Will this group require involvement? Can it introduce changes or constraints to my solution?
- How big will that effort/complexity/risk be? (H/M/L)

"The seeds of problems are laid down early. Initial planning is the most vital part of a project. Review of most failed projects or of project problems indicates that **the disasters were well planned to happen from the start.**" (from Jerry Madden's A Project Manager's Lessons Learned, also known as NASA 100 rules for Project Managers, a 1995 gem and absolute must-read for any PM

[https://www.nasa.gov/pdf/293253main\\_62682main\\_jerry\\_madden\\_forum7.pdf](https://www.nasa.gov/pdf/293253main_62682main_jerry_madden_forum7.pdf)

### Project impact possible drivers:

- |   |                                       |                           |
|---|---------------------------------------|---------------------------|
| 1. Strategy                             | 18. Project, Product Methodology      | 36. Warranty and support  |
| 2. Model                                | 19. Project/change funding process    | 37. HR                    |
| 3. Customer impact                      | 20. Applications                      | 38. Learning              |
| 4. Solution Policy                      | 21. External systems                  | 39. Compensation          |
| 5. Measurements / KPIs                  | 22. Tools (spreadsheets, etc.)        | 40. Finance               |
| 6. Analytics                            | 23. Architecture                      | 41. Pricing               |
| 7. Process, workflow                    | 24. Data access                       | 42. Fraud                 |
| 8. Financial systems                    | 25. Privacy                           | 43. PMO                   |
| 9. Financial transactions               | 26. Build vs. buy                     | 44. Marketing             |
| 10. Organization                        | 27. Technology stack                  | 45. Communications        |
| 11. Roles                               | 28. Infrastructure                    | 46. Legal                 |
| 12. Training                            | 29. Dev & test tools                  | 47. Procurement           |
| 13. Individual performance measurements | 30. Dev & test environments           | 48. Risk                  |
| 14. Compensation                        | 31. Technology provider               | 49. Compliance            |
| 15. Project resources                   | 32. Complexity of systems environment | 50. Audit                 |
| 16. Post-project resources              | 33. Accessibility                     | 51. External – political  |
| 17. Resource mix (vendor, etc.)         | 34. Decommissioning                   | 52. External – regulatory |
|   | 35. Disaster Recovery                 | 53. External – legal      |

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## INTRO

Audience for this material: whomever is tasked with early definition and sizing of a project

Key points:

- **Focusing just on the core solution/product when defining the project usually means missing significant other project drivers**
- **Doing a broad but high level early scan of all possible aspects that may have to be part of, or may impact the project, allows for a more accurate initial project definition – which in turn reduces risk of future crises**
- **Areas to scan are business, people, technology, organization, environment**

How is this material different: a comprehensive but succinct list of possible impact drivers to consider.

What problem does it address:

Under-estimation of initial project costs, duration, risks (also at the often missed ongoing regular re-assessments). Initial estimates are always difficult, usually done under time pressure and with limited information; the focus is on the proposed solution, and if technology involved, even more narrowly focused just on technology. However, other solution aspects (seen as ancillary) and the project environment may significantly impact cost and schedule or even introduce show stoppers; sometimes, less frequently, they may provide project opportunities to take advantage of.

Benefits:

- Provides rich, comprehensive “food for thought”
- Most relevant in enterprise/corporate context, but useful for any size of company
- Applies to any project and product development type/domain
- Scales to any organization size

What this material is / what is not: It is starter list / food for thought, not a playbook

Credentials: Deep experience managing large business transformation and application development programs in complex environments

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