

THE WORK, SCOPE TO STRUCTURE

DEFINING THE WORK

One question, two answers
What is the work? is the first of the six key questions a project management plan answers, and the other five depend on it. Our firm answers it twice. The **scope of services** answers it for the client, in sentences a client can read, visualize, and price. The **Work Breakdown Structure (WBS)** answers it for the project team, in elements a project manager can assign, schedule, and budget.

	APPROACH	SCOPE OF SERVICES	ASSUMPTIONS	EXCLUSIONS	WBS
WHAT IT IS	The proposal content that explains how our firm will solve the client's problem. It answers one question for the selection committee: why this firm.	The statement of the work, the deliverables, the quantities, and the limits our firm commits to under the agreement. It answers what the client is buying.	A condition the scope depends on that the client has not confirmed.	Statements of the specific work the fee does not include.	The scope of work organized into phases, tasks, and subtasks, for the people who perform it.
WHO WRITES IT	The Technical Lead, with the project team.	Each discipline drafts its own scope. The project manager incorporates them into one document, and the team reviews it before it is issued.	Each discipline states the conditions its work depends on. The project manager collects them from every discipline.	The project manager verifies all three exclusionary statements as part of the scope writing process.	The project manager lists the phases and the tasks. Each discipline prepares the subtasks under its own tasks.
THE STANDARD	Persuasive language.	If time will be allocated to a task, the task shall be quantifiable.	The condition, the quantity, and the result if the condition changes.	Three statements. Work our firm will not perform, work others perform with the party named, and work excluded.	Three rules. All of the scope and nothing else, each element once, one owner for each element.
WHERE IT LANDS	The proposal.	The executed agreement. With the approach, it sets the legal boundary for our work.	Beside the task it conditions, again in the assumptions section, and on the WBS element it conditions.	The exclusions in the scope of services. Excluded work produces no WBS element.	The Project Description Form, the schedule, and the Project Cost Spreadsheet.
COST OF A VAGUE ENTRY	A weaker submission.	Work our firm performs without payment.	A condition that fails with no record that anyone expected it to hold.	A client who reasonably believes excluded work was included.	Promised work nobody is assigned to perform, or planned work the fee does not cover.
FULL EXPLANATION	LESSON 2.1	LESSON 2.1	LESSON 2.2	LESSON 2.2	LESSONS 2.3 AND 2.4

01 THE REVIEW: THE SAFER FILTER, FIVE QUESTIONS

THE QUANTITY TEST
ONE TEST GOVERNS SCOPE LANGUAGE
If time will be allocated to a task, the task shall be quantifiable. Each item in the scope of services carries specific numbers, names, periods of time, and staffing. **A count, a duration, and a named participant turn an intention into a commitment both parties can measure.**

BEFORE DRAFTING · SIX PREPARATION STEPS
Define the objectives, the deliverables, and the client expectations. Identify the expertise the project requires. Identify constraints, areas of concern, and unknowns. Collect client documents and similar past scopes. Discuss the project with the client and ask questions. Discuss similar projects with other project managers.

EVERY SENTENCE · FOUR MANDATORY STANDARDS
Weston & Sampson written in full. Active voice, with the performing party first. Will, shall, and should used for their separate meanings. Common language, with no open ended words: all, but not limited to, as directed, is common practice in the industry, and subject to approval.

DOMAIN	THE QUESTION TO ASK	WHAT IT PREVENTS
S Specific	Does the sentence state what our firm delivers, with quantities, names, and periods of time?	Work performed to a standard nobody agreed on
A Assumptions	Is each condition the team inferred written down as an assumption?	A condition that fails with no record that anyone expected it to hold
F Finite	Does each commitment state where it ends?	Unlimited repetition of a task priced once
E Exclusions	Does the passage state the work that falls outside it?	A client who reasonably believes excluded work was included
R Responsibility	Does each sentence name the party that performs the work?	A task that stalls because nobody owns the next action

Fails S or F The passage is missing a number. Add the count, the duration, or the stated limit.	Fails A or E The passage is missing sentences. Write the assumption or the exclusionary statement.
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WILL · SHALL · SHOULD
Will is a declaration of purpose or a statement of fact, for commitments Weston & Sampson makes.
Shall is a requirement placed on the design. **Should** is a best practice or a design criterion. Must does not appear in a scope of services.

The project manager applies SAFER after a draft exists and before the client reads it.

APPROACH

SCOPE OF SERVICES

ASSUMPTIONS

EXCLUSIONS

WBS

02 THE GAPS

Three steps close an open sentence

- List what the sentence does not say: a count, a duration, a named party, a stated limit, or a condition the work depends on.
- Sort each item as confirmed, inferred, or unknown.
- Resolve each item as a number in the sentence, an assumption, an exclusion, or a question to the client before the agreement is executed.

Confirmed means a named source states it, such as the solicitation, a client document, or written correspondence from the client. **Inferred** means the team drew it from experience or from a comparable project. **Unknown** means no evidence exists that the team can name.

AN ASSUMPTION HOLDS THREE PARTS

- The condition the scope depends on.
- The quantity that condition carries.
- The result if the condition changes.

The quantity makes the assumption testable. Each assumption appears beside the task it conditions, and again in the assumptions section that collects the conditions from every discipline.

THREE EXCLUSIONARY STATEMENTS

Work Weston & Sampson will not perform, so the client knows to procure it elsewhere. Work others perform, with the party named, including the client or the owner. Work excluded from the scope that a reasonable client could expect to find in it. A complete statement says what is included, what is not included, and the result if the excluded work becomes necessary.

03 THE STRUCTURE

SCOPE OF SERVICES

Answers what the work is for the client, in sentences a client can read, visualize, and price.

WBS

Answers the same question for the project team, in elements a project manager can assign, schedule, and budget.

A WBS names work. It carries no dates, no staff hours, and no cost. Module 3 sequences its elements into a schedule, and Module 4 assigns staff and cost to them.

THREE LEVELS	WHAT IT IS	WHERE IT APPEARS
Phase	A major stage that ends at a milestone or a major deliverable	Project Description Form, schedule, project folder
Task	A defined part of a phase that produces a deliverable or a result	Project Description Form, schedule, Project Cost Spreadsheet
Subtask	The smallest unit the project manager assigns to one discipline	Schedule, Project Cost Spreadsheet

THREE RULES FOR A COMPLETE STRUCTURE

All of the scope, and nothing else. Every scope sentence has an element, and no element performs work the scope does not contain. **Each element appears once**, grouped under the discipline that performs it. **Each element has one owner.** Where two disciplines contribute, the structure splits the element rather than naming two owners.

REMINDER

An assumption rides on the element it conditions. Work others perform produces no Weston & Sampson element, and the element that depends on it carries an assumption naming the other party and the date the work is needed. Excluded work produces no element at any level.

04 THE BUILD

WHAT THE PROJECT MANAGER COLLECTS

- The awarded proposal.
- The executed agreement, which holds the final scope with its assumptions and its exclusions.
- The scope each discipline prepared during the pursuit.
- Client documents and similar past scopes, which supply the detail a proposal summarizes.

1 PROJECT MANAGER

Phases. Listed from the scope, in the proposal and contract language exactly, so the team and accounting can cross reference them.

2 PROJECT MANAGER

Tasks. Each one a deliverable or a result produced for a scope item. A phase with no task is a gap.

3 EACH DISCIPLINE

Subtasks. Each discipline itemizes the work its staff will produce under its own tasks.

4 PROJECT MANAGER

Combine. One structure, with the duplicates removed.

5 PROJECT MANAGER

Number. A phase takes a whole number, a task one decimal place, and a subtask two.

6 PROJECT MANAGER

Owner. One discipline owns each task. Where two contribute, the task is split.

WHERE A SUBTASK STOPS

One discipline performs it, the team can estimate the hours it takes, and it has a defined end that somebody can observe. Read the subtask aloud and ask who would send the email that says it is finished. One person means the element is the right size. Two people from two disciplines means two subtasks.

05 THE CHECK

TIP

Separate tasks by discipline wherever the work allows it. A task two disciplines charge to produces one budget line, and neither one can tell whether the task is over or under.

Forward Read each scope sentence and find the element that performs it. A sentence with no element is promised work nobody is assigned to perform.

Reverse Read each element and find the sentence that requires it. An element with no sentence is planned work the fee does not cover.

Neither edit to a scope or a structure reaches the other document by itself. Neither pass finds what the other finds, so both are run, and both documents change together.

Four gaps, one action each

SENTENCE, NO ELEMENT	ELEMENT, EXCLUDED
Promised work that nobody will perform. Add the element and name the owner.	The scope already removed this work. Remove the element.
ELEMENT, SCOPE SILENT	WILL NOT BREAK DOWN
The fee does not cover it. Ask the client, and write an exclusion until the client answers.	The sentence fails Specific or Finite. Obtain the information, or write an assumption.

The team review confirms three things before the structure is used: each discipline has read and accepts the subtasks it will perform, each task carries one owner, and the phases and tasks are ready to open on the Project Description Form.