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Q: Which scope diagram is most understandable by business stakeholders?

A: My favorite answer is, *It Depends*. Different people respond to different types of diagrams and documentations. I would encourage you to ask your stakeholders. Maybe show them some examples and ask them what feels comfortable to them. In my real estate case study example, I used the context diagram that seemed foreign to my stakeholders so we ended up using some workflow diagrams to get some current state analysis for me to start scoping.

Using whatever works for your stakeholders and not being afraid to abandon a technique and try another one.

Q: Shouldn't the sponsor define the scope?

A: Ideally, yes. The sponsor is the person who is funding the project, who is going to get the value from the project and ideally they should define the scope.

But what I find is, first of all, when we say define scope, I don't think most business people even know what we are talking about. Scope is kind of an odd word that we use in the English language. So, we need to help them define it. And also, they don't always know what is available. They know they have a problem or a need or an opportunity but they don't always know what the options are so having these conversations and including that technical resource if you think the solution might be technical and giving the sponsor and the key stakeholders some ideas about what might be possible will really help them tell you what the scope should be.

Q: Where is the customer representative—the person receiving the solution in the scope discussion—before funding?

A: If you are building a product for a customer and it depends on the type of product you are building. If it is a custom product, then a lot of this conversation should happen during the contract process. Your sales people should be involving business analysts, project managers, technical leads to talk about the scope. The scope should be defined in the contract.

If you are building something for a customer that is not custom, like an ecommerce system for a website and you want to sell something to your customers, hopefully you could do a focus group with some real customers or you've got a marketing or sales representative who can represent those customers and talk to you about what things they would want, what are those features, functions, capabilities they want. These customers should be a key part of this discussion because effectively they play the same role and your sponsor or your key stakeholders. They are the ones who are going to get the value out of solution so we want to consider their opinions when we are scoping.

Q: At what stage do you recommend to use scoping tools? Is it during the creation of project charter (initiation) or during the Scope definition (planning stage)?

A: Before you can define scope you must understand the business need. Hopefully this analysis is done before a project is even funded. A general description of the intended scope should be included with the project charter. Having said that, in reality sometimes projects are started without a good scope definition. I suggest you review whatever is available as soon as you get assigned to the work and if the scope definition is not clear to you— start asking questions and improve it!

Q: I'm a PM that usually does the BA work too. I find it hard to get the customer to do the current process analysis. What are some ideas on how to convince them of the value of the exercise?

A: That is a great question and a common problem. Business people/customers often don't realize how much you need to know to help recommend and build a solution. Explain to your customer that their process is very important, is complex, and that you don't want to negatively impact the things that they are doing well. Ask questions with an attitude of curiosity (be careful not to sound critical or judgmental) and if your customer is convinced that you are working towards his or her best interests, they will be willing to open up.

Q: **What can be done to tease out hidden agendas from stakeholders?**
A: Another good question and closely related to the last one. Stakeholders need to trust that you are working with them towards their goals. They need to be convinced that you protect confidential information, be on their side when working with technical architects, and that you understand the importance of their business to the overall success of the organization.

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