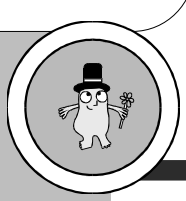
Can We Stop Scope Creep?



Fairy Tale

- Jack and the Bean Stock
- Mom – Cow – Money – 5 Beans
- Climb – Giant – Fee Fye Foe Fum –
- Treasure
- Auditors

Project Scope

- Scope is what we commit to deliver.
- It is generally defined at the start.
- It may not even be fully defined midway through development.
- Sometimes it is still up for debate during testing.

Scoping

- The separation between what is included and what is excluded.
- Control resources, costs and timelines.
- Get it right!

Scope-Creep

- Menacing growth and/or change of audit requirements.
- It happens because mortals cannot always anticipate and identify all requirements 'up front'.
- An evil that we create for ourselves.
- We want to make it perfect with the first release, because we know scope-creep is "bad."

The Faces of Scope-Creep

- Scope-Creep has other names.
  - When he messes with the problem, he's called Objectives-Creep;
  - When he can't find a solution he's called Alternatives-Creep;
  - When he tries to bring extra stakeholders in the picture he's called "A Party-Creep"; and
  - When he promises more he's called Benefits-Creep.

Scope-Creep Is Our Friend

- He is a good guy.
- He has many close friends, who help him at all times. They are happy to speak up for him.
- Who are they?

Scope-Creep Is Not Our Friend

- Scope-Creep can be kept at bay.
- The audit scope is guarded defensively
  - Any interaction with the outside world – whether incoming or outgoing – is regarded with suspicion
  - Don't introduce additional responsibilities and obligations.

It Can Be Personal!

- Pass off legitimate requirements as manifestations of Scope-Creep
- Accumulate them as bargaining tokens in order to improve their resource–responsibility ratio.
- Grab extra budget while simultaneously stacking up excuses for failure.
- Make promises, and then rely on Scope-Creep to get them off the hook.

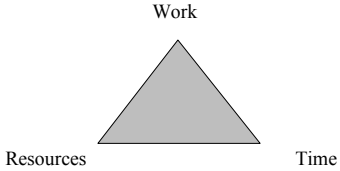
What Kind of Creep Is He?

- Always trying to improve things, to perfect things.
- Strongly committed to meeting the audit's requirements.
- When an audit gets out of alignment with the requirements, he appears to put things right.

He Has a Purpose

- Audits are dynamic.
- Audits demand a degree of change.
- Eliminating scope-creep from a project can suppress change.
- Totally resisting scope-creep can undo much of the bridge-building and rapport that was established.

There Are Consequences



Is the Cause "We Are Confused"?

- Scoping happens by clustering strongly related requirements together.
- It's easy to perceive new connections - new forms of relationships.
- Does our notion of the scope of the audit get broader and more complex over time?
- Are our ideas becoming confused and bloated? Or are they expanding, growing, evolving, becoming enriched?

Is the Cause "We Are Confused"?

- Assess the effectiveness with which the State Historic Preservation Division is managed to achieve its mission.
- Determine whether the Department of Health is in compliance with contracting requirements.

Understand the Causes

- The unknown
- Perfectionism
- Wandering
- Appeasing conflict
- Acquisition
- Career advancement
- Lies and self-deception

The Unknown

- Audits can be ventures into unknown territory.
- Sometimes we underestimate the complexity of the problem we've tackled.
- Zooming in on a crisp line reveals it as a blurred region demanding further analysis.
- Zooming out reveals separate regions and shapes and patterns that are not clearly visible close-up.

Tackling the Unknown

- We need to decide what we are trying to accomplish!
- In the Public Sector, there are many questions to which the answers are unknown or, at least, unclear.

Tackling the Unknown

- How do we create economic development?
- How do we contain and control costs in the health care system?
- How do we match educational opportunities to realistic employment prospects?
- Why do people who work with IT systems make everything seem so difficult?

Tackling the Unknown

- Classic Research
  - Defining a problem
  - Analyzing the problem
  - Exploring what is known
  - Exploring the unknown using creativity
  - Developing and testing potential answers and,
  - Identifying the best answers for certain situations.

A Solution Designed By Auditors

- Not knowing results in setting off in a fit of enthusiasm, but little else.
- The Solution (Step 1):
  - Ensure the problem, requirements and approach are clearly defined and documented.

Framing the Question

- Systematic inquiry begins with a question.
- Ask the right question before becoming involved with method and design.
- Often the question changes to capture the real issues more accurately.
- Sculpting the question starts the learning process

Framing the Question

- One person's poison is another person's tea.
- Individual vs. Group
- Persistence of set
- Follow "my" yellow brick road.
- It is unknown because of my experience and knowledge.

Framing the Question as a Group

- Progress from a variety of individual interests.
- Brainstorming.
- Round of stories, critical words, major ideas-problems, gaps, or barriers.
- Start with broad parameters of the area of inquiry and come to future meeting with questions to be shared with a group.

Framing the Question as a Group

- A group is not a good forum for 'who', 'when', and "where" type questions.
- Avoid questions that have discrete or quantifiable answers.
- Group inquiry addresses questions that are qualitative or experience based.
- Phrased as 'how can', 'how do' and 'what does' type questions.

Framing the Question as a Group

- Members will project individual ideas
- Collective thinking modifies what was earlier envisioned.
- During the early phases, group members raise many issues, advocate many approaches, and ask many questions.
- Timeframes are essential.

Framing the Question as a Group

- Exercise
- How well is the Motor Vehicle Licensing System working?
- 1) **Individually** reframe the question. Develop some optional questions. Develop additional questions.
- 2) In a **group** combine your thoughts. Try to develop one question that is going to define what the group thinks the problem is.
- 3) Where could you have gone to get help?
- Control the Flow

Best Problem Definition

- Expand your thinking.
- Whole new set of ideas.
- Analyze the problem statement before trying to generate approaches or solutions.
- How else can the problem be defined?

Best Problem Definition

- Substitute a word in the problem statement.
- Add words.
- Use the opposite meaning of word, synonyms, or other substitutions.
- "**Revenue projections for the next three quarters are not meeting the state's expectations. We need a new plan**."

Best Problem Definition – A Case

In the early industrial age, buildings began to spring up in areas where land was at a premium. These new buildings were taller than anything ever built before and most had elevators. As buildings got taller and taller, walking was a less attractive option. More people began to use elevators. Elevators in those days were relatively slow. People were constantly complaining about how slow they were.

Elevator companies were challenged with this problem. The problem statement -"elevators move too slow." So they went off to design elevators that were faster and safer, but at the time it was very expensive to do so.

Using a Problem Statement

- Statement A. Describe a desired goal, a state, or a value.
- "The Link". In connected prose, use terms such as: but, however, unfortunately, in spite of.
- Statement B. Describe a condition that prevents the goal, state or value in A from being achieved or realized at this time.
- Question. Describe some information, plan or thing that can affect the status quo that may resolve the clash.

Wandering

Wandering? Keep Objectives in Sight

- **Setting Objectives**
  - **It is critical to set clear, achievable goals for our audit scope.**
  - **Plan and programs**
  - **"To determine…"**

Wandering? Use Risk Analysis

- For each objective, we ask what is the risk of the objective not being fulfilled
- The potential of not completing it and its impact.
- High risk of not being fulfilled and a high-impact need contingency plans or alternatives for fulfilling them.

Wandering? Define Priorities

- In the audit planning process.
- Separate the project requirements into the absolutely necessary, the important and the optional.

Wandering? Complete Audit in Phases

- Scope projects into deliverables.
- The deliverable should contain enough functionality to provide sufficient value to move forward.
- The duration should be short enough to react to the changing conditions.
- Schedule deliverables so that they flow almost seamlessly from one to another.
- Include time constraints.

Wandering? One State's Deliverables

- **Deliverable 1: Statement of Project Objectives**
- **Deliverable 2: Planning Document and Assignments**
- **Deliverable 3: Task Based Project Plan(s)**

Begin Audit Action Steps: Field Work

- **Deliverable 4: Cross-Indexed Findings Statements**
- **Deliverable 5: Quality Control Review of Findings**
- **Deliverable 6: Draft Report**
- **Deliverable 7: Final Report with Summary**
- **Deliverable 8: Committee Briefing**
- **Deliverable 9: Release of Report**

A Solution Designed By Auditors

- The Solution (Step 2):
  - Stick rigidly to the scope. (Danger)
  - If changes are required put them through a change management process where they are documented and justified.

Perfectionism

- Sir Winston Leonard Churchill
  "The word 'Perfection' spells:
  P – a - r – a – l – y – s – i – s"
- Peter Drucker
  "The perfectionist falls into the trap of doing things right instead of doing the right thing."

Perfectionism

- All the detail is necessary before moving on.
- Mistakes are punished.
- Stress.
- Delegating is painful.
- "What you see as substandard is perfectly acceptable to others."

Perfectionism

- Do you tend to be overly concerned about what others may think of you?
- Are you prone to going over and over your work until it meets with your total approval? "
- Do simple tasks take up a lot of your time?
- When you finish a job, do you often think that perhaps you could have done it better?
- Do you feel elated and pleased about yourself when you turn in some excellent work, but feel a little depressed at other times when your work has not been as well done, as you would have liked?

Appeasing Conflict

- Do almost anything to avoid dealing with conflict directly.
- Expand scope to satisfy all conflicting parties.
- Appeasing all creates a project plan that nobody can execute.

Acquisition

- A failing project sometimes acquires another project on the basis of "natural fit" or "efficiencies."
- Consolidation isn't free.
- Efficiencies are often illusions.

Career Advancement

- With bigger projects and more resources, leaders can enhance their organizational power.
- Senior managers must learn to recognize these tactics, and approve scope expansions only on the basis of sound management principles.

Lies and Self-deception

- Sometimes we unknowingly lie to others or deceive ourselves.
- We don't know what's really involved, but suspect.
- Secures approval for changes.
- Persuades ourselves or the organization to agree to tackle it.

Hints and Wisdom

- The formulation of a problem determines the range of choices: the questions you ask determine the answers you receive.
- Be careful not to look for a solution until you understand the problem, and be careful not to select a solution until you have a whole range of choices.
- The initial statement of a problem often reflects a preconceived solution.

Hints and Wisdom

- When the goal state is clear but the present state is ambiguous, try working backwards.
- Procrastinators finish last.
- Solve the problem that really exists, not just the symptoms of a problem, not the problem you already have a solution for, not the problem you wish existed, and not the problem someone else thinks exists.

Hints and Wisdom

- Take time to examine and explore the problem thoroughly before setting out in search of a solution. Often, to understand the problem is to solve it.
- Breaking the problem into smaller parts will often make solving it much easier. Solve each part separately.
- You can always do something.

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