

HNC PROC 2010

Project Scope and Customer Requirements Definition

Scope

This process defines the Project Manager leads the PDT in developing the project scope, customer expectations and the decision making involved.

Policy

[ER 5-1-11, U. S. Army Corps of Engineers Business Process](#)

Responsibility

The Project Manager (PM) is responsible for:

- Serving as the project point of contact with the customer(s).
- Understanding who the customer is.
- Leading the Project Delivery Team (PDT) in developing the scope of work and a set of mutually acceptable project objectives that meets or exceeds the customers' stated or implied expectations, while taking into account the needs, constraints, and expectations of other stakeholders.
- Understanding that not all stakeholders may be known at the start of a project.
- Understanding the customer/stakeholder needs and expectations and translating them into specific deliverables.
- Understanding the HNC Overall Acquisition Strategy (OAS).
- Leading PDT in determining how decisions will be made, funding provided and acquisition plans developed.

The Customer is responsible for:

- Providing a clear description of what is to be accomplished in the Project.
- Providing all or some project funds and certain products and/or services on some projects.
- May have a degree of decision-making authority.

The Stakeholder(s) is responsible for:

- Having an interest in the outcome of the project.
- May provide input on project scope and schedule.
- May or may not have decision-making authority or provide funds.

The Project Delivery Team (PDT) is responsible for:

- Developing the scope of work while adhering to statutory, regulatory, and policy guidance.
- Scoping, scheduling, and estimating accurately their portions of the project.
- Discussing and agreeing on the quality and delivery expected for their respective products and services.
- Discussing and agreeing on the key decision points included in the PMP.
- Discussing and agreeing on a systematic approach to measure the progress, status, and quality of their respective products and services.
- Committing to complete their portions of the work within the agreed to budget and schedule.
- Performing quality work.

The Resource Provider(s) is responsible for:

- Determining resource availability.
- Ensuring the accuracy of the scope, schedule and estimate agreed to by their respective PDT member.
- Ensuring the commitment of their respective PDT member to complete their portions of the work within the agreed to budget and schedule.
- Ensuring the quality of the work of their respective PDT member.

Distribution

Project Delivery Team (PDT)

Project Manager (PM)

Customer

Resource Provider(s)

Ownership

The Office of the Deputy for Programs and Technical Management (DPTM) is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

System References

[Acronyms and Glossary- REF 8000G](#)

[HNC Overall Acquisition Strategy – HNC PROC 6002](#)

[Program \(Project\) Delivery Acquisition Plan – HNC PROC 2050](#)

[Change Management – HNC PROC 3010](#)

[Change Management Plan – REF 8009G](#)

[Communications Plan – REF 8006G](#)

[Earned Value Management – REF 8018G](#)

[PMP/PgMP Approval – HNC PROC 2070](#)

[PMP/PgMP Content – REF 8005G](#)

[PMP/PgMP Development- HNC PROC 2000](#)

[Quality Management Plan – REF 8008G](#)

[Risk Management Plan – REF 8007G](#)

[Safety and Occupational Health Plan – REF 8016G](#)

[Engineer Bulletin ECB 2002-13 \(May 2002\)](#)

[Value Management Plan - REF8023G](#)

Activity Preface

This process is performed after a new project is identified, and may be performed prior to formation of the entire PDT. (Initially, the PDT may consist only of the PM and the

customer. In this case, a preliminary scope may be developed to determine the PDT composition.)

This process may also be conducted iteratively as a part of the PMP development and approval process. The charrette process (see [Engineer Bulletin ECB 2002-13 \(May 2002\)](#)) is a proven method to effectively define customer criteria.

If the PDT is already established, the PM acts in conjunction with the rest of the PDT. If the PDT has not been established, this process may include coordination with subject matter experts as required.

After the customer scope is defined, return to [PMP/PgMP Development – HNC PROC 2000](#).

Project Manager (PM)/Project Delivery Team (PDT) (if established)

1. Facilitate defining the customer's needs and expectations for the project.

Initial contact will include general discussions on scope, key deliverables, related goals, criteria, available resources, schedule requirements, quality expectations, risk analysis, preferred acquisition method (refer to [HNC Overall Acquisition Strategy – HNC PROC 6002](#)), procedures to change the project (refer to [Change Management – HNC PROC 3010](#)), and other customer conditions and preferences that may impact the way in which the project is executed.

Manage customer expectations by ensuring customer understanding of essential professional standards, laws and codes in the project, as well as project-specific guidance or requirements from higher authority.

2. Identify stakeholders and stakeholder issues.
3. Define how the customer and stakeholders will be involved throughout the project.
4. Work with the customer(s) to determine their role in the decision-making process and how funds will be provided.

Coordinate with RM PDT member on funds provisions.

5. Determine who will endorse/approve the Project Management Plan (PMP) for customer and approve changes to it.

Refer to [PMP/PgMP Approval – HNC PROC 2070](#).

6. Facilitate development of customer's portion of communications plan.

Refer to [Communications Plan – REF 8006G](#).

7. Discuss potential risks with customer.

Refer to [Risk Management Plan – REF 8007G](#) and [Safety and Occupational Health Plan – REF 8016G](#).

Project Manager (PM)

8. Involve PDT in review of draft SOW and project requirements definition.

Project Manager (PM)

Project Delivery Team (PDT) (if established)

9. Develop draft SOW with Customer and define project requirements.

Include consideration of the customers' needs and expectations, cost and schedule requirements, quality objectives, special technical requirements and unique criteria, and the decision making/change approval process for the project. Work closely with other members of the PDT (if established) to ensure all necessary items are addressed and issues resolved.

Ensure customer understanding of essential professional standards, laws and codes in the project, as well as project-specific guidance or requirements from higher authority.

10. Determine if the PDT agrees (consensus) with the draft SOW.

If the PDT agrees, go to Task #15. Otherwise return to Task #11.

11. Forward draft SOW to Resource Provider(s).

Resource Provider(s)

12. Review and revise the SOW as necessary.

13. Determine if there is agreement. (Consensus of PDT, PM and Resource Providers)

If there is agreement, go to Task #9. Otherwise go to Task #14.

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14. Review and resolve issues and conflicts with the SOW.

Customer

15. Review and approve draft SOW and project requirements definition.

If Customer approves Draft SOW, go to Task #16. Otherwise return to Task #9.

Project Manager (PM)

16. Determine if draft SOW is different from synopsis.

If draft SOW is different from synopsis, go to Task #17. Otherwise, go to Task #18.

17. Attach draft SOW as a reference document in P2.

18. Enter synopsis of customer SOW in P2.

End of activity.

Return to [PMP/PgMP Development – HNC PROC 2000](#).

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