

SPD - Customer Scope and Requirements Definition - PROC2010

Scope

This process defines how the Project Manager leads the PDT in interactions with customers and stakeholders to develop project scope, expectations, and the decision-making process involved.

Policy

ER 5-1-11, U. S. Army Corps of Engineers Business Process

<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>

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
- Leading PDT in determining how decisions will be made, funding provided and acquisition strategy developed

The Customer is responsible for

o providing all or some project funds and certain products and/or services on some projects, ~~and may~~

o ~~share some of the~~ decision-making authority. [Response: accepted and reworded in master document](#)

The Stakeholder is responsible for having an interest in the outcome of the project, may provide input on project scope and schedule, but may or may not have decision-making authority or provide funds. [Response: reworded in master document.](#)

The Project Delivery Team (PDT) is responsible for [response:](#)

- Developing the scope of work, while adhering to statutory, regulatory, and policy guidance
- Scoping, scheduling, and ~~developing budgets for estimating accurately~~ their portions of the project [response: reworded in master document.](#)
- ~~Discussing and agreeing~~ **Establishing** on the ~~customer expectations and delivery quality and delivery expected~~ for their respective products and services [response: reject see reworded master document.](#)
- ~~Discussing and agreeing~~ **Identifying** on the key decision points included in the PMP [response: reject see reworded master document](#)
- ~~Discussing and agreeing~~ **Formulating** on a systematic approach to measure the progress, status, and quality of their respective products and services [response: reject see reworded master document.](#)
- 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 [response: deleted from master document](#)

- 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~~ **Verifying the** quality of the work of their respective PDT member [response:](#)

Distribution

Project Delivery Team (PDT)

Project Manager (PM) *

Ownership

The BP/P2 Configuration Manager 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- REF8000[REF8000]

Advanced Acquisition Strategy – PROC2060[PROC2060]

Change Management – PROC3010[PROC3010]

Change Management Plan – REF8009[REF8009]

Communications Plan – REF8006[REF8006]

Earned Value Management – REF8018[REF8018]

PMP/PgMP Approval – PROC2070[PROC2070]

PMP/PgMP Content – REF8005[REF8005]

PMP/PgMP Development- PROC2000[PROC2000]

Quality Management Plan – REF8008[REF8008]

Risk Management Plan – REF8007[REF8007]

Safety and Occupational Health Plan – REF8016[REF8016]

Activity Preface

This process is performed after a new project is identified [PROC1000 or 1030](#), [response: does not follow the logic. Can't get here from there.](#) and may be performed prior to formation of the PDT. This process may also be conducted iteratively as a part of the PMP development and approval process. The charrette process [response: will be added](#) 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 – PROC2000[PROC2000]*.



Project Manager (PM)

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 *Advanced Acquisition Strategy – PROC2060[PROC2060]*), procedures to change the project (refer to *Change Management – PROC3010[PROC3010]*), 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. [Response: noted](#)

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 s 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 – PROC2070[PROC2070]*.

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

Refer to *Communications Plan – REF8006[REF8006]*.

7. Discuss potential risks with customer.

Refer to *Risk Management Plan – REF8007[REF8007]* and *Safety and Occupational Health Plan – REF8016[REF8016]*.

8. Finalize draft scope of work.

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.

9. Enter synopsis of customer scope in P3e.

If detailed scope is different than the synopsis, goto task #10. Otherwise, end of activity.

10. Attach detailed scope as a reference document in P3e.

End of activity.

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