

Customer Scope Definition Should this be “Project Scope Definition?”

Response: Rejected., Prefer existing wording, as modified. Also, I think that this activity should be done with all the team members, i.e. after the formulation of the PDT. Sometime there are technical constraints that the customer is not aware. Having the right technical folks there to explain it may affect the customer's decision on requirements. Response: Reworded. See master document.

Need this same process raised to Division and Headquarters echelons, in the development of the USACE-wide approach to macro-level customer requirements (again, think of Force Protection). All aspects of USACE resources can and will be applied to resolving customer ‘program’ requirements, which then determine scope and response capabilities to individual project requirements. This should drive the development of Program Management Plans (PgMP) at Division and HQ levels, which should then be reflected in the CCG and USACE-wide resource planning and allocation. Response: This should be covered in HQ business processes, which have not been received by the team.

Scope typically scope is a function of requirements.... Response: This is the scope of this process.

This process defines how the PDT Response: Reworded. See master document. interacts with customers and stakeholders for a specific project, and the decision-making process involved. does this also include non-Federal sponsors? The opening paragraph refers to stakeholders but only customers are mentioned in the activity preface. Response: Reworded. See master document.

Policy

ER 5-1-11[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>]
ER 37-1-26[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf>], I don't see relevance of citing ER 37-1-26. There are many much more relevant references for scope definition, such as AR 415-15 and AR 420-10 and DA Pam 420-6 . Response: Accepted. Reworded. See master document.

Responsibility as a team member one of the customer's most important roles is to participate in a clear development of requirements, project definition, and scope. This process helps set the teams expectations as one view.... In a way the PM facilitates this process. Response: Accepted.

The Project Manager is responsible for serving as the primary USACE point of contact with the customer(s) and working with them to develop the scope of the project. One of the PM's greatest challenges is to balance these interests and develop a scope of work and set of project objectives that meets or exceeds the customers' stated and implied expectations, while taking into account

the needs and expectations of other stakeholders, statutory, regulatory, and policy guidance. it is the whole PDTs challenge to balance the Corps and the customers/stakeholders interests with the scope of work – not just the PM’s. [Response: Reworded. See master document.](#)

Scope definition must include defining the customer’s expectation for quality as well as the level of quality required for the project. [Response: Reworded. See master document.](#)

Before the scope can be defined, the Project Manager must understand who the customer [Recommend use of the plural rather than singular whenever referring to customer.](#) [Response: Will do as appropriate. Refer to glossary.](#)

is, and how they will make decisions. Furthermore, customers and other stakeholders may have competing or conflicting interests. The PM must understand customer/stakeholder needs and expectations, and translate them into specific deliverables.

The PM also works with the customer(s) and leads the PDT in determining how decisions will be made and how funding will be provided for the project. The customer(s) is known at the start of the project and has some degree [Recommend a higher degree of definition when it states that the customer has, “some degree of decision-making authority on the project.”](#) [Response: Reworded. See master document.](#) of decision-making authority on the project, and may be responsible for providing all or some project funds.

Stakeholders may provide input on project scope and schedule, but may or may not have decision authority, and may or may not fund the project, but have an interest in the project outcomes. Not all stakeholders may be known at the start of a project.

- [This section differentiates between “customer” and “stakeholder”...however, the glossary on pg 162 indicates they are one in the same. Need to clarify](#) [Response: All customers are stakeholders; not all stakeholders are customers.](#)

[Addresses the role of the PM and PDT but it is silent on the need to inform the sponsor/customer upfront as early as possible, what legal or policy constraints may impact the potential project and the sponsor's expectations.](#) [Response: Reworded. See master document.](#)

Distribution

Project Delivery Team (PDT)

Project Manager (PM)*

Ownership

The BP/P2 Program Office 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\[REF1001\]](#)

[Advanced Acquisition Strategy\[PROC1006\]](#)

[Change Management\[PROC1004\]](#)

[Change Management Plan\[REF1025\]](#)

[Communications Plan\[REF1022\]](#)

[PMP Approval Process\[PROC1018\]](#)

[PMP Development\[PROC1012\]](#)

[PMP/PgMP Content\[REF1018\]](#)

[Quality Management Plan\[REF1024\]](#)

[Risk Management Plan\[REF1023\]](#)

Activity Preface

This process is performed after a new project is identified, and prior to formulation of the PDT. This process may also be conducted iteratively as a part of the PMP development and approval process.

If the PDT is already established, the PM acts in conjunction with the rest of the PDT. It is correct that this most often occurs prior to formulation of the PDT, however the PDT may also be engaged in this process and should be if the PDT has been formed. Response: Reworded. See master document.

After the customer scope is defined, the project manager returns to the process from which they (Non-gender reference) Response: Reworded. See master document came. These processes would include [PMP Development\[PROC1012\]](#) and [PMP Approval\[PROC1018\]](#), and [Change Management\[PROC1004\]](#).

Project Manager (PM)

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

Include general scope, key deliverables, related goals, criteria, available resources, schedule requirements, quality expectations, risk analysis, preferred acquisition method (refer to [Advanced Acquisition Strategy\[PROC1006\]](#)), procedures to change the project (refer to [Change Management\[PROC1004\]](#)), and other customer conditions and preferences that may impact the way in which the project is executed.

Ensure customer understanding of essential professional standards, laws and codes in the project, as well as project-specific guidance or requirements from higher authority, e.g., VTC fact sheets, work allowances, directives, etc. – Good to mention professional standards, laws and codes. This needs emphasis throughout the document. Response: Accepted

Include discussion of financial terms, conditions/constraints and responsibilities in this initial ‘customer scope definition’. The finances often shape the project more than ‘essential professional standards, laws and codes.’ Response: Reworded. See master document. See responsibilities section for PM.

2. Identify stakeholders, and define how the customer and stakeholders will be involved throughout the project.
3. Work with the customer(s) to determine their role in the decision-making process and how funds will be provided.
4. Determine who will sign the Project Management Plan (PMP) for customer and approve changes to it.

Refer to *PMP Approval[PROC1018]*.

5. Facilitate development of customer’s portion of Communications Plan. PM should work with PAO on development of the Corps part of the Communications Plan in addition to the customer part. Response: Reworded. See master document., refer to Communications Plan.

Refer to *Communications Plan[REF1022]*.

6. Discuss potential risks with customer. Discussions with the customer regarding risk should be documented. The customer should be getting input from their staff (fire department, safety office, environmental, civil engineering, etc.) relative safety and health concerns. These safety and Health related concerns should be separated and provided to the PDT as the Preliminary Hazard List (PHL) to be use in the development of the Risk Management Plan. Response: Reworded. See master document. Refer to Safety Plan.

Refer to *Risk Management Plan[REF1023]*.

7. 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, e.g., VTC fact sheets, work allowances, directives, etc.

8. Enter synopsis of customer scope in P3e as a Notebook Item.

If detailed scope is different than the synopsis, go to task #9. Otherwise, end of activity.

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

End of activity.

