**TEMPLATE**

**Project Scoping**

**Working with clients**

In reality, the way you work with a client’s will depend on many factors, such as size of the project; type of project and management processes in both companies. These suggestions are based on my experiences working with small companies; and based on my experience of the projects delivered by final year teams.

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| **Purpose of 1st Meeting**  1) To gain an understanding of the client and their goals  2) Identify potential working relationship and skills match  3) Develop rapport  *Scoping guidelines – Questions and considerations*  Define Project objectives   * What is the key objective of the project? * Identify deliverables, what are the tangible outcomes. What will the client get? * Consider the stakeholders likely to be interested or affected by the project, what are their goals? * What are the main tasks?   Uncertainty   * What are the constraints? * Form a view of the project 'unknowns' i.e. Things you're not sure of. * Importantly define what you won't do / can't do * Identify questions that you will ask the client.   Next Steps   * Develop two basic solutions for discussion at the follow up meeting * Identify any Quick Wins to gain credibility   The outcome: Prepare a short scoping document that can be discussed at the 2nd meeting |

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| **2nd (follow up meeting)**  Objective: Present your view of the project (based on initial meeting) and its fit with the companies goals.  Explain why you would be the best people for the project  Clear First steps and deliverables  Outcome: A commitment to create a fully developed project proposal. |
| **Client Proposal**  **Key considerations for the proposal**   * Do you understand the job?   + The big picture   + Do you understand their business and customers   + Have you identified any problems or issues   + Actions of competitors * Can you demonstrate the right skills?   + What's your track record, Skills and interests * Can you describe the project?   + What defines success - consider the company, customers, stakeholders   + Budget, timing, activities and other resources * How will you work with the client?   + Communication   + Co-ordination |

**TEMPLATE**

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**A simpler approach is to create the '2 pager' which summarises key issues faced by the project team**

Two page scoping document should cover

* Page 1
  + State the Mission/goal/objectives (tasks)
  + Identify the core stakeholders and their concerns
  + Explore factors and constraints
    - *examples*
      * *Financial*
      * *Staffing availability*
      * *Time considerations*
      * *physical resources*
  + Recommend solution options (max 3)
* Page 2
  + Action plan
  + Create task list which:
    - Identify responsibilities within the project team
    - Key dates
    - Costs (if required)
    - Time frame to complete the tasks / project



**TEMPLATE**

**Speed Networking Outsourcing pro-forma**

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| * *Your Company Name, logo etc.* * *The outsourcing project description* * *Quick description key words e.g. marketing, events, research*   *>INSERT TEXT<* |
| * A brief description of the the project you are working on. i.e   *>INSERT TEXT<* |
| * Brief description of your team and its aims   *>INSERT TEXT<* |
| * Suitability of the candidate company   *>INSERT TEXT<* |
| * Description of the job   + Timing   + Deliverables   (Aim to provide a simple task for a single team to complete, you can always produce more than one brief) |
| * Your Contact details   *>INSERT TEXT<* |

**To be completed by Final Year teams**