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Components of a project scope template

The exact structure of project scope documents will vary based on your industry, your company's operational goals, the type of project and other factors. However, most project scope templates share these common components:

- **Objective statement:** Why are you asking your team to take on this project? What are the project goals? How do those goals align with the overall business objectives? Document the business case for your plan, using the SMART framework. Under this acronym, each of your goals should be Specific, Measurable, Attainable, Relevant and Time-Based.
- **Deliverables:** What do you expect to have in hand at the end of the project? What are the established acceptance criteria for these deliverables? Outcomes may be tangible, such as a new product, or intangible, such as a new way of conducting [performance management reviews](#).
- **Budget:** How much will the project cost? What does each budget line item include? Is the return on the project projected to justify the expense?
- **Stakeholders:** Who is the internal lead for the project? Who are the other team members who will contribute? Who owns responsibility for each deliverable? Do you [need to hire](#) freelance, temporary or consulting help for the project?
- **Schedule:** What is the timeframe of the project? What variables affect the schedule? What important milestones does the team have to meet along the way?
- **Communication:** How often will stakeholders receive project updates? What form will updates take (email, Zoom meeting, etc.)?
- **Performance metrics:** How will you measure the success of the project? What are the expected constraints that could challenge this success? Will the project have downstream effects on other projects or on general business operations?
- **Terms and requirements:** What additional conditions need documentation or clarification? Include those items here when they haven't been covered elsewhere.

Best practices for project scope

These strategies can help you create an effective document to drive successful project completion and ward off the expenses associated with scope creep.

Detailed deliverable descriptions

Document each of your deliverables in granular detail. All parties should understand exactly what the end results of the project will entail to avoid misunderstandings and retain strong relationships with clients, contractors and other stakeholders.

Visual appeal

Incorporate graphics where appropriate, especially for long or complex project scope documents. Present timelines, budgets and other components in a visually attractive format to enhance readability and comprehension.

Expression of exclusions

Clearly emphasize items excluded from the project. The deliverables section should spell out anything that falls outside the scope of work. For example, if you build a software program, you might exclude technical support beyond 90 days. Including the exclusions section allows you to manage project assumptions effectively and limit unrealistic or unfounded expectations. Common assumptions in the project management space include the availability of resources and team members, sufficient information technology infrastructure, budget items and environmental conditions.

Strategic scheduling

One of the best ways to prevent a project timeline from going off-course? Build in extra time at the start to account for those inevitable snags. The earlier you create the project schedule, the easier it will be to incorporate an extra day, week or month where you need it.

Clarity on constraints

When writing the scope document, consider potential obstacles and limits that could affect successful project completion. If possible, address these items with a contingency plan. Commonly, constraints arise in financial, regulatory, legal or physical aspects of the project, such as local zoning ordinances.

Clear, concise language

Stick to the basics without leaving out key project details. Avoid extrapolating at length on items outside your main template outline. By the same token, use simple,



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easy-to-understand language. If you need to use industry jargon, define those terms briefly to make sure all stakeholders are on the same page when they review the document. Simply put, be as concise as possible.

Collaborative approach

Involve team members who will take part in the project. Take time to solicit feedback about budget, deliverables, process, schedule and other areas that affect their work. Doing so can increase project engagement, a critical component of success. You can also delegate specific components of the template to the appropriate writers on your team. For example, it makes sense for the account manager to handle the budgetary piece of the puzzle.

Consistency check

Before moving forward with the final steps of executing your scope document, make sure it does not include inconsistencies. Even minor errors such as a budget typo of a single number or a miswritten deadline can create issues that cost companies tens of thousands of dollars and even lead to lost clients.

Formal sign-off

All internal and external stakeholders must have the same expectations for the project to convene and proceed successfully to completion. Ensure that everyone reviews and signs this critical document before beginning work. Keep it close at hand so it can serve as a guiding reference from start to finish.

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