

"Approved."

CEO of <Organization Name>

<Full Name>

*<Name and authority of the sponsor or other person(s) authorizing the Project Charter>*_____
2024

<Project Name> Scope Baseline Revision 7.0

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This document is part of the "Baselines" artifacts, as described in section 4.6.5 of the Project Management Body of Knowledge (PMBOK® Guide, 7th Edition). This is reflected in the document's code (the first three digits).

*The **Scope Baseline** is the approved version of a scope statement, work breakdown structure (WBS), and its associated WBS dictionary that can be changed using formal change control procedures and is used as the basis for comparison to actual results.*

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List of Changes

Date	Revision	Description	Author
<m/d/yyyy>	<7.0>	Publication for use	<Author>

Note:

- **'Date'** represents the exact date when the changes or revisions to the document were implemented.
- **'Revision'** refers to the revision number of the document. When significant changes are made to the document, the first digit is incremented, and the second digit is reset to zero. For minor changes, only the second digit is altered.
- **'Description'** provides a detailed account of the revision and any changes made, such as 'Published for internal comments', 'Published for use', 'Published with changes in Chapter X', etc.
- **'Author'** signifies the full name of the individual who made the amendments.

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This document is a **PMBOK** artifact template, which is part of the **PMBOK.Kit** designed for effective project management and the creation of the corporate project management standards. Using these templates allows for time savings, simplifies project documentation, and improves document quality. These universal templates can be adapted to meet the needs of any company, regardless of its field of activity.



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1. General Provisions

<This section outlines the general attributes of this document, and how to create and use it. These general provisions can be altered or supplemented as per project requirements.>

This document pertains to the project "<Project Name>", which is being implemented by the organization "<Organization Name>".

The Scope Baseline is the approved version of a scope statement, work breakdown structure (refer to PMBOK 4.6.4.5 "WBS"), and its associated WBS dictionary.

The Scope Baseline is used as the basis for comparison to actual results. Once a Scope Baseline has been approved, it can be changed using formal change control procedures (refer to PMBOK 4.6.3.1 "Change Control Plan").

<In predictive projects, the Scope Baseline for the project is the approved version of the project scope statement, work breakdown structure (WBS, refer to PMBOK 4.6.4.5 template), and its associated WBS dictionary. A baseline can be changed only through formal change control procedures (refer to PMBOK 4.6.3.1 "Change Control Plan" template) and is used as a basis for comparison while performing Validate Scope and Control Scope processes as well as other controlling processes.

Projects with adaptive life cycles use backlogs instead of Scope Baseline (including product requirements and user stories) to reflect their current needs.

The Scope Baseline can be written either at a summary level or in detail, and it may consist of one or more subsidiary plans.

This template provides a comprehensive approach for a Scope Baseline, and any items not pertinent to the current project may be removed for simplicity and clarity.

It is important to note that approved changes during the course of a project, tracked via the 'Change Log' (refer to PMBOK 4.6.2.3 template), can significantly impact sections of the Scope Baseline.>

2. Normative References

<This section should include a comprehensive list of documents referenced in this document. Each document should be identified by its corresponding title, number (if applicable), date, and the name of the publisher or author. Specify the sources from which the reference information can be obtained.>

This document refers to the following documents:

Number	Name	Publishing Date	Author
PMBOK® Guide	A Guide to the Project Management Body of Knowledge — Seventh Edition	2021	PMI
PMBOK 4.6.1.1	Business Case		PMDoc
PMBOK 4.6.1.4	Project Charter		PMDoc
PMBOK 4.6.2.3	Change Log		PMDoc
PMBOK 4.6.3.1	Change Control Plan		PMDoc
PMBOK 4.6.3.2	Communications Management Plan		PMDoc
PMBOK 4.6.3.6	Project Management Plan		PMDoc
PMBOK 4.6.4.5	Work Breakdown Structure		PMDoc
PMBOK 4.6.9.5	Requirements Documentation		PMDoc

3. Terms, Notations, Abbreviations

<This section should include definitions of all terms, notations, and abbreviations necessary for the correct interpretation of this document. The terms, notations, and abbreviations should be arranged in alphabetical order. This information can be presented in the table format provided below, or as a reference to a Project Glossary in the Communications Management Plan (refer to PMBOK 4.6.3.2 template).>

3.1. Terms used in this document

Term	Definition
100 percent rule	<i>The total of the work at the lowest levels of a WBS rolls up to the higher levels.</i> This principle is known as the 100 percent rule. The 100 percent rule ensures that a WBS captures all known scope and project deliverables. This principle applies to all levels of a WBS, so the sum of the work at the child level totals the work at the parent level.
Acceptance Criteria	A set of conditions that is required to be met before deliverables are accepted.
Assumption	A factor in the planning process that is considered to be true, real, or certain, without proof or demonstration.
Constraint	A limiting factor that affects the execution of a project, program, portfolio, or process.
Control Account	A management control point where scope, budget, actual cost, and schedule are integrated and compared to earned value for performance measurement.
Deliverable	Any unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a process, phase, or project.
Objective	Something toward which work is to be directed, a strategic position to be attained, a purpose to be achieved, a result to be obtained, a product to be produced, or a service to be performed.
Product	An artifact that is produced, is quantifiable, and can be either an end item in itself or a component item. Additional words for products are material and goods. <i>See also 'deliverable'.</i>
Planning Package	A WBS component below the Control Account with known work content but without detailed schedule activities.
Requirement	A condition or capability that is necessary to be present in a product, service, or result to satisfy a business need.
Stakeholder	An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.
Work Package	The work defined at the lowest level of the work breakdown structure for which cost and duration are estimated and managed.

3.2. Notations used in this document

Notation	Transcript
Organization	<Organization Name>

3.3. Abbreviations used in this document

Abbreviation	Complete Form
PMIS	Project Management Information System
PMBOK	Project Management Body of Knowledge
SOW	Statement of Work
WBS	Work Breakdown Structure

4. Project Scope Statement

<This section presents a description of the project scope, major deliverables, acceptance criteria, and exclusions.

The project scope statement documents the entire scope, including project and product scope. It describes the project's deliverables in detail. It also provides a common understanding of the project scope among project stakeholders. It may contain explicit scope exclusions that can assist in managing stakeholder expectations. It enables the project team to perform more detailed planning, guides the project team's work during execution, and provides the baseline for evaluating whether requests for changes or additional work are contained within or outside the project's boundaries.

This information may be drawn directly from the Business Case (refer to PMBOK 4.6.1.1 template) and Project Charter (PMBOK 4.6.1.4 template) or presented in this baseline through individual subsections such as:

- **Project Scope Description:** Detailed description of the project scope, including work boundaries.
- **Deliverables:** List of major deliverables the project is expected to produce.
- **Acceptance Criteria:** Criteria that must be met for the deliverables to be accepted.
- **Project Exclusions:** Specific exclusions, stating clearly what is out of scope.

Fulfill the following sections:

4.1. Product Scope Description

<This section documents the narrative description of the product scope. The product scope description progressively elaborates the characteristics of the product, service, or result described in the Project Charter (refer to PMBOK 4.6.1.4 template) and Requirements Documentation (refer to PMBOK 4.6.9.5 template).

To effectively fill out this section, you should consider and answer the following questions:

1. What are the key features and functions of the product, service, or result?
 - What characteristics define the product or result?
 - What are the essential features that must be delivered?
2. How does the product scope align with the project charter?
 - How does the product scope derived from the Project Charter (refer to PMBOK 4.6.1.4 template) detail the characteristics of the product?
 - Are there additional details in the Product Scope that were not covered in the Project Charter?
3. What are the requirements documented for the product?
 - What specific requirements from the Requirements Documentation (refer to PMBOK 4.6.9.5 template) need to be addressed in the product scope?
 - How do these requirements translate into product features or functions?
4. How does the product scope support the project's Business Case (refer to PMBOK 4.6.1.1)?
 - How does the product contribute to achieving the business objectives outlined in the Business Case?
 - What are the expected benefits and outcomes from delivering the product with the specified features and functions?
5. What are the technical specifications or performance standards required for the product?
 - Are there industry-specific standards or regulatory requirements that the product must meet?
 - What are the quality standards that the product needs to adhere to?
6. Are there any innovations or unique elements in the product scope that differentiate it from similar products or services?
 - What unique selling points or innovative features does the product have?
 - How do these unique elements align with the strategic objectives of the organization?
7. What are the potential modifications or enhancements anticipated for the product during the project lifecycle?
 - Are there any foreseeable changes or enhancements that might be considered for the product?
 - How would these changes be managed within the scope of the project?

By answering these questions, you can ensure a comprehensive and detailed Product Scope Description that aligns with both the project's strategic objectives and the detailed requirements necessary for successful project completion. This section should clearly articulate what the product is, what it is intended to do, and how it fits within the larger context of the project and organizational goals.>

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4.2. Deliverables

<This section describes any unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a process, phase, or project. Deliverables are typically the outcomes of the project and can include components of the Project Management Plan (refer to PMBOK 4.6.3.6 template). Deliverables also include ancillary results, such as project management reports and documentation. These deliverables may be described at a summary level or in great detail. Deliverables may be tangible or intangible.

Change control (refer to PMBOK 4.6.3.1 "Change Control Plan" template) should be applied once the first version of a deliverable has been completed. The control of the multiple versions or editions of a deliverable (e.g., documents, software, and building blocks) is supported by configuration management tools and procedures.

To effectively fill out this section, you should consider and answer the following questions:

1. What are the specific deliverables of the project?
 - What tangible or intangible products, results, or capabilities to perform a service are expected to be completed as part of the project?
 - Are these deliverables clearly defined and verifiable?
2. How does each deliverable contribute to achieving the overall project objectives and the strategic goals of the organization?
3. What are the major components of each deliverable?
 - If deliverables are complex, what are their constituent components or sub-deliverables?
 - How are these components integrated to form the final deliverable?
4. What are the summary-level descriptions or detailed descriptions of each deliverable?
 - Should the deliverables be described in summary form for clarity, or is a detailed description necessary for understanding and execution?
5. What are the tangible versus intangible deliverables?
 - Which deliverables result in physical products, and which are services or digital outcomes?
 - How are intangible deliverables measured or verified?
6. How will changes to deliverables be managed?
 - What processes or tools (such as configuration management systems) will be used to manage changes to deliverables?
 - How will changes be approved and documented to ensure they are in line with the project scope and objectives?
7. What documentation or reporting is associated with each deliverable?
 - What project management or technical documents are needed to support the creation and delivery of each deliverable?
 - How will these documents be developed, approved, and maintained?
8. What are the quality criteria for each deliverable?
 - What specific quality standards or acceptance criteria must each deliverable meet to be considered complete?
 - How are these criteria determined and who is responsible for validating them?
9. Who is responsible for delivering each component?
 - Which team or department is accountable for the delivery of each specific deliverable?
 - How is their responsibility documented and communicated within the project team and to external stakeholders?
10. What are the expected dates for the completion of key deliverables?
 - What are the scheduled timelines for the completion and delivery of each major deliverable?
 - How do these timelines align with the overall project schedule?

By addressing these questions, you can ensure that this section is comprehensive, providing clear and actionable information about what the project will produce, the standards those products must meet, and how they will be managed throughout the project lifecycle.>

4.3. Acceptance Criteria

<This section documents a set of conditions that are required to be met before deliverables are accepted. The definition of acceptance criteria may significantly increase or decrease quality costs and, therefore, project costs. Satisfying all acceptance criteria implies the needs of the stakeholders have been met.

Deliverables that meet the acceptance criteria are formally signed off and approved by the customer or sponsor. Formal documentation received from the customer or sponsor acknowledging formal stakeholder acceptance of the project's deliverables is forwarded to the Close Project or Phase process.

To effectively fill out this section, you should consider and answer the following questions:

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1. What are the specific criteria for each deliverable?
 - What must be achieved or demonstrated for each deliverable to be considered complete and acceptable?
 - Are these criteria measurable and verifiable?
2. Who defines and approves these criteria?
 - Which stakeholders or project team members are involved in setting the acceptance criteria?
 - Who has the final say in approving these criteria?
3. How do the acceptance criteria ensure that the deliverables meet the predefined quality standards set for the project?
4. What documentation is required to validate that deliverables meet the acceptance criteria?
 - What forms of evidence (e.g., test results, inspection reports, certification) are required to prove that deliverables meet the acceptance criteria?
5. How are changes to the acceptance criteria managed?
 - If changes to the acceptance criteria are needed, what is the process for reviewing and approving these changes?
 - How are stakeholders informed about changes to the acceptance criteria?
6. What are the implications of not meeting the acceptance criteria?
 - What steps are taken if deliverables do not meet the acceptance criteria?
 - Are there contingencies or remediation processes in place?
7. Who is responsible for reviewing and signing off on completed deliverables?
 - Which individuals or groups are responsible for reviewing deliverables against the acceptance criteria?
 - Who has the authority to sign off on the deliverables once they meet the acceptance criteria?
8. How will disputes regarding satisfaction of acceptance criteria be resolved?
 - What mechanisms are in place to handle disagreements between stakeholders regarding whether deliverables meet the acceptance criteria?
9. What impact do the acceptance criteria have on project scheduling and resource allocation?
 - How do the requirements for meeting the acceptance criteria affect the project timeline and the allocation of resources?
10. How is compliance with acceptance criteria tracked and reported?
 - What tools or systems are used to track compliance with the acceptance criteria?
 - How and when is compliance information reported to stakeholders?

By thoroughly addressing these questions, you can ensure that this section effectively defines how the success of each deliverable will be judged, facilitating clear communication and understanding among all project stakeholders. This also aids in ensuring that project deliverables are completed satisfactorily, meeting both project and stakeholder expectations.>

4.4. Project Exclusions

<This section identifies what is excluded from the project. Explicitly stating what is out of scope for the project helps manage stakeholders' expectations and can reduce scope creep.

To effectively fill out this section, you should consider and answer the following questions:

1. What specific activities or components are excluded from the project scope?
 - Are there any tasks, features, or functions that have been specifically excluded from the project?
 - What areas might be mistaken as part of the project but are not intended to be included?
2. Why are these items excluded?
 - What is the rationale behind excluding certain elements from the project?
 - How do these exclusions align with the overall project objectives or constraints?
3. Who determined the exclusions and how were they decided?
 - Which stakeholders or team members were involved in the decision to exclude certain elements?
 - What criteria were used to determine what should be excluded from the project scope?
4. How do these exclusions impact the project's deliverables and outcomes?
 - What are the potential impacts of these exclusions on the project's expected outcomes?
 - How do these exclusions affect the workload and focus of the project team?
5. Are there any conditions under which these exclusions might be reconsidered?
 - Are there scenarios or triggers that could lead to a reevaluation of the excluded elements?
 - What is the process for potentially including previously excluded items back into the project scope?
6. How are exclusions communicated to stakeholders?
 - What methods are used to ensure all stakeholders are aware of what is excluded from the project?

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- How is this information maintained and updated throughout the project lifecycle?
- 7. What documentation supports the exclusions?
 - Are there documents or references that provide further details or justification for the exclusions?
 - Where can stakeholders find detailed information about the scope boundaries and exclusions?
- 8. How do exclusions affect the project's risk profile?
 - Do these exclusions introduce any new risks to the project?
 - How are these risks being managed?
- 9. What are the implications for project budget and resources?
 - How do these exclusions affect the project's budget and resource allocation?
 - Are resources being redirected or conserved as a result of these exclusions?
- 10. How are disputes regarding exclusions handled?
 - What is the process for addressing disagreements or misunderstandings about what is excluded from the project?

By addressing these questions, you ensure that this section is comprehensive and clear. This section helps manage stakeholder expectations, clarifies the boundaries of project work, and assists in preventing scope creep by explicitly stating what is not included in the project.>

5. Work Breakdown Structure (WBS)

<The WBS is a comprehensive decomposition of the project's total scope of work. It is structured hierarchically, with each subsequent level providing a more detailed breakdown of the project work.

Depending on the needs of your project, you could put the WBS chart in this section, or alternatively, **provide a reference to a separate WBS document (refer to PMBOK 4.6.4.5 template)**. If you choose to place the WBS here, it must include the following sections:

- **WBS Overview:** A short description of the hierarchical decomposition of the total scope of work to be carried out by the project team.
- **Level 1 (Project Name):** This level comprises the full scope of work necessary to produce the product, service, or result. It includes all direct and indirect work. Level 1 is the overall product, service, or result, which is always a single WBS element. Different project management information systems (PMIS) represent this element in various ways.
- **Level 2:** This is the first level of decomposition. This level is the high-level breakdown of the major areas in the scope of work. **Project phases, major project deliverables, sub-projects, or releases** (in agile life cycles) typically exist on the second level. This level often contains integration and project management work.
- **Level 3:** This level decomposes each level 2 WBS element as required. It is important to note that the WBS development adheres to the **100 percent rule**. This level often focuses on specific, tangible deliverables of the project effort.
- **Level 4:** In the same manner, each level 3 WBS element decomposes as required. The complexity of the work drives the depth and number of levels of the WBS decomposition. Independently of the levels of decomposition, the lowest level of the WBS contains **work packages**.>

6. WBS Dictionary

<This section provides granular details about each component of the WBS, including deliverable specifics, activity descriptions, and scheduling information. The WBS dictionary contains a wealth of information like code of account identifiers, work descriptions, assumptions, constraints, responsible organizations, schedule milestones, associated activities, resource requirements, cost estimates, quality requirements, acceptance criteria, technical references, and agreement information. It's important to note that most of this information is created by other processes and added to this document at a later stage.

- **Introduction:** A text that provides detailed information about each component in the WBS.
- For each WBS component (use a separate section for each component):
 - **Code of Account Identifier:** Unique identifier for tracking.
 - **Description of Work:** Detailed description of the work to be performed.
 - **Assumptions and Constraints:** Specific to this component.
 - **Responsible Organization:** Department or team responsible for the work.
 - **Schedule Milestones:** Key milestones related to this component.
 - **Associated Schedule Activities:** Activities needed to complete the work package.
 - **Resources Required:** Resources needed, including human resources, technology, and materials.
 - **Cost Estimates:** Estimated costs associated with the work package.

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- **Quality Requirements:** Specific quality standards the deliverable must meet.
- **Acceptance Criteria:** Specific criteria for acceptance of the deliverables produced by this work package.
- **Technical References:** References to documents, diagrams, or policies that influence this work package.
- **Agreement Information:** Details of any agreements or contracts relevant to this component.>

7. Appendixes

<This section includes all appendices to the document. Appendices may contain supplementary material that helps provide more depth to the information included in the Scope Baseline. They might contain diagrams, charts, images, or additional data that support the main content but may be too detailed for the body of the Scope Baseline. Appendices should be labeled clearly for easy reference in the document.>

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