pax8 Academy

FACILITATING AND SCOPING A STATEMENT OF WORK

Syllabus

Last updated: March 2024

Course Overview

Facilitating and Scoping a Statement of Work is a four-week course in which participants will gain essential skills and knowledge to effectively scope and manage projects. The course begins by emphasizing the importance of efficient scoping and introduces participants to common pitfalls in scoping practices. Through practical examples, attendees will learn how poor scoping impacts project outcomes, including scope creep and its effect on gross margin.

The course delves into Project Management Institute (PMI) methods tailored for MSPs, covering project charters, scope statements, and work breakdown structures. Participants will explore templates, standard discovery questions, and engage subject matter experts to enhance scoping accuracy. Leveraging historical lessons learned and risk registers, participants will refine their scoping processes. Additionally, the course addresses pricing, vendor tools, and the role of artificial intelligence in scoping.

By the end of the course, participants will be equipped to create comprehensive statements of work, manage client expectations, and ensure quality assurance in their scoping endeavors.

This course is applicable to those in Sales, Account Managers, Project Managers, or Owners.

What You'll Get

- 4 hours of virtual, interactive, instructor-led content taught by an experienced MSP Project Manager-expert.
- Downloadable videos* of the content you can rewatch at your convenience.
- Downloadable slide decks, handouts, and resources.

Learning Objectives

By attending this course, Partners will learn:
- Identify key stakeholders involved in creating a Statement of Work (SOW).
- Understand the components needed to create a comprehensive SOW including the project charter, scope statement, and Work Breakdown Structure (WBS).
- Develop the skills to establish and maintain a system of quality assurance throughout the project lifecycle.
- Use effective and precise language in the SOW to safeguard both the MSP and their client.

*Videos will either be recordings from your session, or they may be previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to reap the full benefits of Q&A with the instructor and class.

Schedule of Topics

1. Introduction and Class Etiquette
2. The Need for Efficient Scoping
   a. Common Practices (and why they're bad)
   b. Results of bad practices:
      i. Scope Creep
      ii. Scoping Impact on Gross Margin
3. Introduction to PMI Methods for MSPs
   a. PMI Introduction
   b. Pax8 Academy Coaching
4. Qualifying Leads
5. Responsible Roles
6. Standard Estimating Methods
7. Structure of Scoping
   a. Project Charter
   b. Scope Statement
   c. Work Breakdown Structure
   d. Statement of Work
8. Project Charter
9. Inputs
   a. Scoping Templates
   b. Standard Discovery Questions
   c. Subject Matter Experts
   d. Historical Lessons Learned
   e. Risk Register
   f. Client Requirements
   g. Product Analysis (Solution Stack)
10. Scope Statement
11. Work Breakdown Structure
    a. Bottom-Up Estimating
    b. Templates
    c. 4 Levers of Gross Margin
    d. Leveraging AI
    e. Vendor Tools (scope stack)
12. Fees and Contingencies
13. Statement of Work / Proposal
    a. Setting Expectations
    b. The 'right' amount of information
14. Quality Assurance

Instructor

Josh Moree, PMP, SCM
Senior Executive Coach

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Additional Resources

https://www.pmi.org/

Next Steps

Explore your next step with Pax8 Academy:
- On-Demand Content
  - Strategic Time Management
- Instructor Led Course
  - Contracts and Agreements
  - Project Management
  - Managing Projects in ConnectWise
  - Managing Projects in Autotask
- Peer Groups
  - Consider joining a Peer Group for Project Managers
- Coaching
  - Sign up for Business Coaching