Purpose

This document outlines some thoughts about Vision and Scope documents extracted from the book Software Requirements (Karl E. Wiegers, 1999. Microsoft Press,Redmond. 350 pp.)

Comments

Background

The business requirements, which are obtained from interviews with high-level managers, define the vision and scope of a software system. A project that lacks a clearly established direction is an invitation for disaster.

One sign that the business requirements are not sufficiently well developed is that certain features are initially included, then deleted, and then added back later. Vision and scope issues must be resolved well before the detailed functional requirements are fully specified. An explicit statement of scope an limitations helps greatly with discussions of proposed features and target releases. A well-defined project vision and scope document also provides a point of reference for making decisions about proposed requirements.

The project vision aligns all project participants in a common and clearly expressed direction.

The vision and scope document collects the business requirements into a single, concise document that sets the stage for all subsequent development work. It is recommended that this document should be completed before the project is funded.

Suggested Template

The vision and scope document can be usefully structured as follows:

1. Business requirements
    1.1. Background
    1.2. Business opportunity
    1.3. Business objectives
    1.4. Customer or market requirements
    1.5. Value provided to customer
    1.6. Business risks
2. Vision of the solution
    2.1. Vision statement
    2.2. Major features
    2.3. Assumptions and dependencies
3. Scope and limitations
    3.1. Scope of initial release
    3.2. Scope of subsequent releases
    3.3. Limitations and exclusions
4. Business context
    4.1. Customer profiles
    4.2. Project priorities

5. Product success Factors

Description of document sections

1. **Business Requirements** – identifies the primary benefits that the product will provide to the customers and to the organization. Describes why the project is being undertaken.
   1.1. **Background** – summarizes the rationale for the product..
   1.2. **Business opportunity** – describes the market opportunity or business problem that is being solved by the product.
   1.3. **Business objectives** – describes the important business benefits the product will provide, preferably in a way that is quantifiable and measureable.
   1.4. **Customer or market requirements** – describes the needs of typical customers
   1.5. **Value provided to customers** – defines the value the customers will receive from the product and indicates how the product will lead to improved customer satisfaction.
   1.6. **Business risks** – describes the major business risks associated with developing or not developing this product.
2. **Vision of the solution** – establishes a long-term vision for the product which addresses business objectives
   2.1. **Vision statement** – a concise statement that summarizes the long-term purpose and intent of the product. This statement should reflect a balanced view that will satisfy the needs of diverse customers.
   2.2. **Major features** – a numbered list of the major features or user capabilities the new product will provide, emphasizing those features that distinguish it from competing or existing products.
   2.3. **Assumptions and dependencies** – a listing of an assumptions that were made when conceiving the project and writing the vision and scope document.
3. **Scope and limitations** – the scope provides a description of the concept and range of the proposed solution, and the limitations identify certain capabilities that the product will not include. This section serves to establish realistic customer expectations.
   3.1. **Scope of the initial release** – summary of major features planned for the initial release of the product.
   3.2. **Scope of subsequent releases** – a summary of envisioned features of later releases of the product
   3.3. **Limitations and exclusions** – lists any product features that a stakeholder might anticipate but which are excluded from the proposed product.
4. **Business context** – summarizes some of the project's business issues.
   4.1. **Customer profiles** – each customer profile identifies essential characteristics of a different category of customer for the product. Each profile should include:
       - Major benefits received from the product
       - Likely attitudes towards the product
       - Key product features of interest
       - Success drivers
       - Any know customer constraints that must be accommodated
   4.2. **Project priorities** – it is often useful to consider the five dimensions of a software project: features, quality, schedule, cost and staff. Each of these dimensions can be categorized as: driver – a top-priority objective; constraint – a limiting factor within which the project must operate; degree of freedom – a factor which can be balanced against other dimensions to achieve drivers within known constraints.

5. **Product success factors** – outlines how success will be defined and measured for the product, and which factors are likely to have the greatest impact on achieving that success.

The Context Diagram

The context diagram graphically illustrates the product boundaries established in the vision and scope document by showing the connections between the proposed product and the outside world. The context diagram is used as the top-level abstraction in a data flow diagram.

Keeping the scope in focus

The business requirements recorded in the vision and scope document provide a valuable weapon in the ongoing battle against scope creep. The document enables you to assess whether proposed features and requirements are appropriate for inclusion in the project.