



# Question No. 5 to develop your safety excellence strategy

**W**hat's the scope? Projects don't fail in the end; they fail in the beginning and usually because expectations aren't aligned. Scope creation is a boundary development exercise that helps you define your expectations and resource commitment. While a clearly created scope is vital, this is still the hypothesis part of strategy creation; several more choices will need to be made.

## A successful plan must identify the boundaries of your journey.

By following this strategy creation methodology, you have identified the purpose, customers to focus on, what value they can provide, and what value you can capture and deliver to them. A vision of success has been created; you have better realized the rationale and perhaps already have an idea of what your story needs to be to shape and move the culture toward this needed focus of improvement. Now is the time to consider what you want to accom-

plish, where the specific focus should be, how small or large of a change you want to take on, and what internal and external resources are available to you.

Radio commentator Larry Elder once pointed out, "A goal without a plan is just a wish." A successful plan must identify the boundaries of your journey: Where to go or not go, who should be involved to help make the important decisions, what tools and vehicles are available, what milestones will be along the way and when you expect to arrive. This is the importance of creating a realistic scope.

These additional questions will help you establish your scope: What size of change are you looking at? Is it the right size? Why is that? How are you making room for contingencies? How are you taking unknowns into consideration? Where are the scope boundaries, and how will you contain them? How will you determine the scope? Do you have data? Is your guess educated enough, or do you need to go back to previous questions? What are your initial expectations? Why are they realistic? What has to happen? What has to be

prevented? What biases are active? What are the cost boundaries? How flexible are they? Are costs aligned with expected value? What does commitment look like? Who will do what by when? Who are the dissenters? Do they have well-argued positions? Could they be right? Are you trying to do too much? Are you able to focus on the agreed-upon scope? What might distract you, and how will you handle distractions? What won't you do to make room for additional effort? If you accomplish success more quickly than expected, how will you then expand the scope? If you don't initially succeed, what will you do next? Who should be involved in all of these decisions? What resources (internal and external) might need to be involved? What is the budget or request for expenditures process?

Defining the scope creates a boundary of what you will and won't do, which items you will address and, just as important, those items you will not address. Bear in mind, your original idea will probably change as you gather data and test your narrative. Progress is rarely linear.

You may need to reevaluate and correct course. You may come across hidden biases or conditions you didn't account for. Then, you'll need to go back to earlier questions and reexamine your story, rationale, vision or customers. Boundaries align effort and expectations. What's the scope?

Upcoming articles will continue to focus on the remaining questions that must be asked and answered to create your safety excellence strategy.

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