

We continuously aim to find engaging ways to phrase the challenge and excite and align key stakeholders involved in scoping improvement projects.

BOSCARD is a great tool for helping you and your team capture key information – it forces important questions to be asked upfront and to align your team.

What is it? A way to structure a project or business improvement proposal in a way that describes all of the relevant aspects succinctly and quickly.

What can it be used for? It can help structure both complex and simple project proposals and briefing documents. To communicate via written word or presentation the key points and areas of interest to a wide range of people.

It is particularly useful for presenting an executive summary either as a written document or presentation.

Getting the team to prepare the BOSCARD is a useful way of ensuring project team members have a shared understanding of the project.

How to do it When preparing a proposal or briefing use the BOSCARD acronym to structure your document/presentation using the following steps:

Background & Opportunity

Gather information, identify relevant issues & answer ...

1. What are the reasons for creating the project?
2. Who are the key business functions that will benefit ?
3. What is one key opportunity for change that the project relies on?

Opportunities could be DIRECT or INDIRECT but must have a positive impact on the business if the project is successful.

Objectives & Benefits

Key aims of the project & how they will be measured

Describe the specific project objectives and link each of them with the SMART framework for project objectives.

Specific – objectives must be clearly defined

Measurable – measuring criteria for objectives must be fully understood

Achievable – objectives must be achievable

Relevant – provide the willingness to involvement; relevant to the people involved

Timely – objective must be bound with a time frame. e.g. within 2 months

Well-scoped improvement projects have a greater chance of delivering successful outcomes than poorly scoped ones.

Scope

Project boundaries e.g. dept.'s, systems, sites, people, timescales

This section is KEY and needs to be agreed upon to avoid scope creep later in the project.

In Scope?

- What business areas ARE included and impacted?
- Which tasks ARE included?
- Is there anything else you need to include?

Out of Scope?

- What business areas will NOT be included, but may be included by assumption?
- Which tasks will NOT be included, but may be included by assumption?
- Is there anything else that could be assumed to be included but you know it isn't?

Constraints & Risks

limitations & issues external to the project itself

Identify ANYTHING that could delay you from reaching your ultimate goal – the constraints

- A great example is a lack of resource
- Identify ANYTHING that could cause the project to fail – the risks
- Include a quick assessment of the significance of each risk and how to address them.
- Document in a table format

Add constraints and risks to the project plan (when done) and address them throughout the project.

Your Business.
Better.



The purpose of BOSCARD is to summarise. It is not a substitute for a detailed project plan or proposal.



Assumptions

The agreed decisions about the project.

You can include references to other projects and initiatives that may impact the project. Get your assumptions wrong and the project WILL be delayed! Or worse still – FAIL!

You will need to:

- Specify all factors that are, considered to be true, without validation.
- Validate your assumptions throughout the project.

Tip: Not recognizing the project's dependencies WILL mean you fail to obtain the right resource or assets to reach your goal.

Ask yourself this:

- What do we need?
- Who do we need to be involved?
- Where do we need to work?
- What other projects need to be completed FIRST?

Tip: ALWAYS actively work to remove constraints and assumptions



Roles & Governance

Resources - people, money, time & facilities the project needs

When people don't know what their roles are in a project, they can react in different ways, be aware of:

- Some people are REALLY enthusiastic and try to do everything
- Some people becoming demotivated because there's no leadership

Tip: Defining the roles of the project stakeholders will ensure everyone works together in conjunction with each other.

Do this...

- Provide the roles of the management team who will govern the project.
- Provide details of team member (or Subject Expert) requirements and how much of their time will be taken up by project work.



Deliverables

Defining what the outputs of the project will be

Include references to measurable benefits and also physical deliverables, asking:

- What are you delivering?
- Is this key

The bottom line is If you get this wrong there will be disagreements at the end of the project. And, are some upset stakeholders - so be sure to complete this section.

Define the key deliverables that the project is required to produce to achieve the stated objectives. Deliverables must be tangible, e.g. Documents, Presentations or even the development of a system functionality

Try to keep your descriptions for each of the seven headings to a maximum of one page per presentation chart. If the terms used do not fit with the usual terminology change them to suit (e.g. if you usually use the term Aims instead of Objectives use that as the heading in your proposal).