



RESEARCH SCOPE STATEMENT

[Document Title]
[Document Subtitle]

Author's name

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1. Background

Brief description of what or who initiated the project.

Statement outlining the research needed and how the research meets these needs.

Key stakeholders (either in a simple list or in the table provided).

	Group	Priority level 1	Priority level 2
Internal	<i>Project initiator</i>		
	<i>Upper management</i>		
	<i>Project team</i>		
	<i>End users</i>		
	<i>Groups commonly involved</i>		
External	<i>Collaborators and consultant</i>		
	<i>Suppliers/vendors</i>		

2. Project description

Define the business objectives (that relate to the research need).

Define specific research objectives (these should relate to the business objectives).

3. Project scope

3.1 Deliverables

Outline deliverables.

Define any areas not included in the project scope.

Set completion dates for all deliverables.

Outline any external dependencies (where the success of the research depends on the work or input from other work teams, individuals or external consultants).

Define change advisory contacts (persons authorised to decide if changes to the scope are permitted or required).

3.2 Assumptions

List assumptions (these are usually considered risks and must therefore be identified in the planning stage, for example, 'funds will be available to pay for the new website by [date]', 'marketing employees will be available to work on the scheduled project activities when required').

3.3 Constraints

Outline project constraints.

4. Project milestones

List research project start date.

List completion dates estimated for each stage of the project.

List research project completion date.

Milestones	Target date
Project commencement	dd/mm/yy
Project completion	dd/mm/yy

5. Project overview

5.1 Research methodology

Detail how you will undertake the research.

Learner should identify how they're going to find relevant data for their research.

Examples of the different data they might use for their research could include the following.

- *Formal or informal comments and feedback*
- *Government statistics*
- *Industry planning information*
- *Qualitative data*
- *Quantitative data*
- *Sales figures*

5.2 Data collection tools

Outline research methods and data collection tools you'll use.

Methods used to obtain the data could include the following.

- *Case study investigations*
- *Focus groups*
- *Literature review*
- *Mail surveys*
- *One-on-one interviews*
- *Personal observation*
- *Small group discussions*
- *Completion of questionnaires or other survey tools*
- *Questionnaires completed by staff to record data about enterprise activities*

Additional data sources could include the following software options.

- *Customer relationship management software/database (CRM)*
- *Enterprise resource planning software/database (ERP)*
- *Inventory management system (IMS)*
- *Automated web tracking, internet traffic and sales conversion rates*

5.3 Communication plan

Summary of your marketing communication plan (promotional methods).

Outline who you will include in project meetings, how updates on your research will be reported and how often.

5.4 Resources required

List resources required (internal and external, human, financial, physical).

5.5 Known risks

List any known risks or issues that could potentially impact the research.

Known issues that could potentially impact the research could relate to the following laws, codes of practice and national standards.

- *Anti-discrimination legislation and principles of equal opportunity, equity and diversity*
- *Ethical principles*
- *Environmental sustainability*
- *Market codes of practice and conduct*
- *Australian Consumer Law (ACL)*
- *Privacy law*
- *Copyright law*

6. Quality process

Outline how you will quantify required data.

Determine verification processes (how you will check successful completion of project deliverables).

Define person/team for checking processes.

7. Budget

Define anticipated costs (salaries, purchase of software, equipment, external consultation, etc.)

Outline any ongoing expenses or services required.

8. Project approvals

List the employee responsible for approving different aspects of the project, such as the project budget, allocation of staff resources, scope changes, purchase of materials, etc.

Include a detailed scope statement approval for the required employees to acknowledge, date and sign.

Scope statement to be approved by: **[insert name and title]**

Scope changes to be approved by: **[insert name and title]**

Project budget to be approved by: **[insert name and title]**

Purchases to be approved by: **[insert name and title]**

9. Approval statement

I certify that I have reviewed and agree with the information contained in this scope statement **[insert title of scope statement]**. I understand by signing this approval statement I am accepting this document as a formal outline of the research to be undertaken.

Name	Signature	Position	Date