

How to Deal With Client Scope Creep

What is scope creep?

Scope creep refers to the expansion of a client project or client services beyond what was originally agreed to – and what the client is paying for.

Scope creep generally falls into one of three categories:

1. Work product or deliverable
2. Involvement of a person or people
3. Extension of time

Scope creep is a problem because it:

- Cuts into your profits.
- Increases your resentment and frustration.
- Costs you other opportunities.
- Leads to client dissatisfaction.

Steps to deal with scope creep.

STEP 1. Use the proven BoldHaus 5-step sales process.

By setting your process, conducting a right-fit conversation, reviewing your full capabilities, doing a thorough needs discovery process and co-creation the solution to 100% with the client, you will help the client to more accurately identify their needs from the outset.

STEP 2. Define in scope and out of scope in your client agreements.

Work with your attorney to develop a thorough client contract. Ensure you have a section dedicated to what is in scope and what is out of scope.

If you know from experience that clients often request certain additional things, mention those in the agreement specifically as being out of scope and that an additional conversation and agreement is required to add those.

Similarly, if you already have a fixed price for certain services, consider outlining those items in the agreement. For example, if additional people assessments cost \$100 each, you can include that dollar amount right in your initial contract.

STEP 3. Train your bench and team.

Make sure everyone involved in working with your client (i.e. your bench, team and/or strategic partners) is fully read in on what is in scope versus what is out of scope.

Let them know what the process is for when a client makes a request for something that may be above and beyond the agreement, so that they don't inadvertently make a commitment on your behalf to something they shouldn't.

STEP 4. Host a client kick-off meeting. Remind them of the scope.

Every client engagement should begin with a thorough kick-off meeting. One of the items you should cover is what is included in the scope of the project. You can also review what's out of scope.

In addition, be proactive in asking your client, *"How would you like us to let you know of any requests that come up that are out of scope?"*

STEP 5. Reiterate the scope at each critical client meeting.

It's always easier (and less awkward) to deal with a scope creep issue before the toothpaste is out of the tube.

That's why it's imperative to do a quick touch-and-go on scope at each milestone meeting.

If you see other needs arising, bring them up. Remind your client these are things you can help with should they want to look at additional support.

Example: *"We noticed a lot of your managers are asking about how best to communicate X to their employees. If that's something you would ever want our help with, let us know and we can schedule a time to discuss what that would look like."*

STEP 6. Pause before responding.

Should a request or expectation come up from the client that is out of scope, avoid a knee-jerk or emotionally charged reaction.

In fact, you may want to avoid responding for a full business day.

STEP 7. Maintain your boundary.

Because you laid the groundwork all along, you are in a solid position to respond to any requests for work product that is outside the scope of work.

Example 1

“Hi John, I wanted to reach out because we received a request from Jane to _____.

This sounds like it would certainly be worthwhile and contribute to the project’s success.

At our kickoff meeting, you asked that I let you know directly if anything comes up that is outside the scope of our current agreement.

This request falls into that out-of-scope category.

Of course we would be delighted to help you with this and it’s certainly something we’ve had great success with for other organizations.

Are you free on Friday for a short meeting to discuss?

Warmly,

You”

Example 2

“Hi John, thanks so much for reaching out about this.

This step sounds like it would certainly be worthwhile and contribute to the project’s success.

Given that this is outside the scope of our current agreement, let’s set up a short meeting this week to discuss further what this will involve.

We can also share with you a few other components you might want to consider as well.

Are you free on Friday for a short meeting to discuss?

Warmly,

You”