

SCOPE CREEP

KEEPING SCOPE CREEP FROM KILLING YOUR SCHEDULE AND PROFIT MARGIN

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WHAT EXACTLY IS SCOPE CREEP?

- Scope Creep is when the scope of the project gets bigger
- WITHOUT any changes to the project budget or timeline
- The “Creep” part is because work isn't usually added in *obvious* ways
- It's usually in smaller less obvious ways these extra things “creep” into a project.



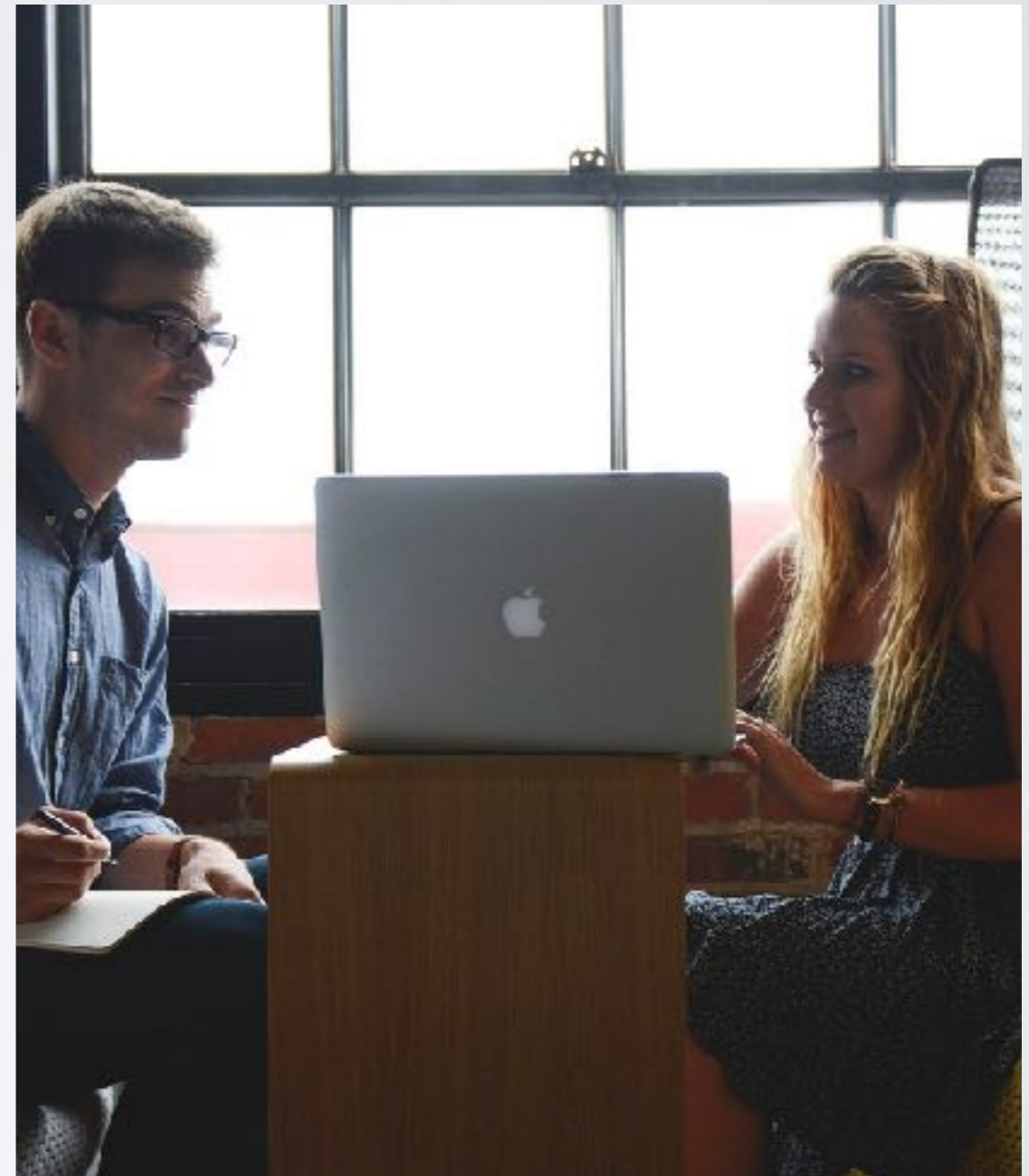
RECOGNIZING SCOPE CREEP WHEN IT STARTS

- If your client requests items that were NOT agreed to upfront, then it is SCOPE CREEP
- If your client asks for things that they never communicated to you and are NOT in the written, signed proposed statement of work — It's SCOPE CREEP.



WHY CLIENTS NEED TO CARE ABOUT SCOPE CREEP

- Their 30-hour job Creeps to a 40-hour job
- Work gets rushed
- Time set aside for code cleanup and testing is now gone
- Their WordPress Expert has lost enthusiasm for the job and is not interested in working with them again



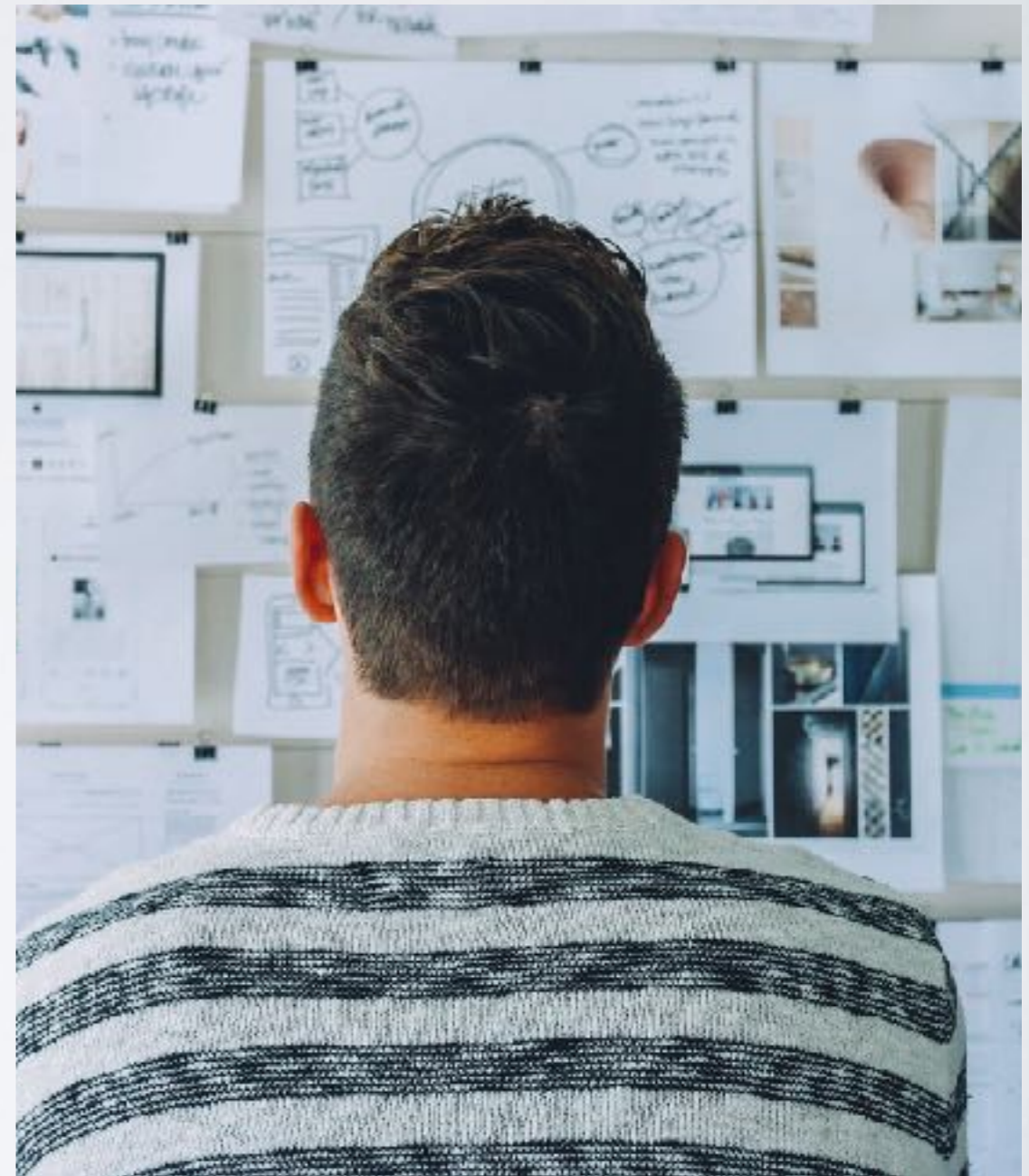
PROJECT MANAGEMENT FAILURES THAT CONTRIBUTE TO SCOPE CREEP

- Not Having Clearly Defined Project Requirements - Scope of Work
- An Ineffective Customer On-Boarding Processes
- Lack of Consistent Processes and Systems
- Ineffective Client Relations Management
- Not Sticking to the Agreed Scope of Work



START AS YOU MEAN TO GO ON

- Invest In the Time to Build a WordPress Project Brief
- Developing an accurate “Project Brief is as crucial as the execution of the project itself.
- Your Project Brief is the basis of your Project Management Plan that will save you and your client Time and Money
- If you are using sub-contractors on the Project — a detailed specification is critical to their success



WHAT SHOULD BE INCLUDED IN ANY PROJECT BRIEF

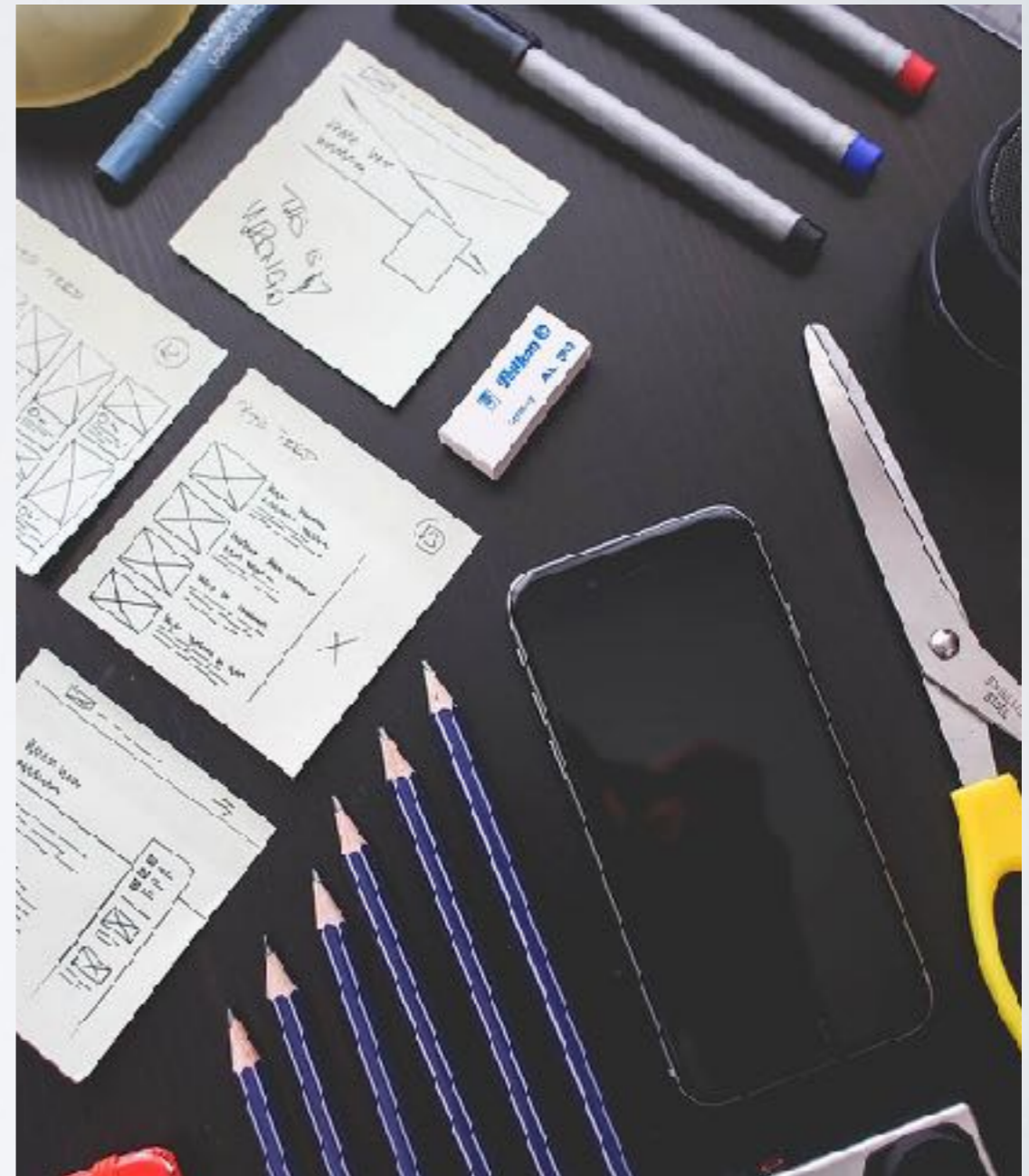
- Goals of the project
 - SMART Goals are Specific, Measurable, Achievable, Relevant, and Time Bound.
- Budget
- Timeframe
- Users and target audience
- Design consideration and preferred aesthetic

WHAT SHOULD BE INCLUDED IN ANY PROJECT BRIEF

- Success criteria
 - KPI (measurable metrics by which a project can be judged as a success (or not) in accordance with the client's primary goal)
- 15% increase in newsletter subscription
- 25% more site traffic
- Increase the amount of leads via the website by 10%
- Increase online conversions by 5%

CLEARLY DEFINE PROJECT REQUIREMENTS

- Detailed project /client discovery is necessary to develop an accurate Scope of Work that allows you to give a reliable time and cost estimate for the project.
- Get to the real motivations, agendas, drivers, expectations, goals on the table at the beginning, instead of being surprised by time-released, headaches throughout the project — when expectations are clear on both sides, implementation is less stressful for everyone.



WHAT IS A PROJECT SCOPE OF WORK?



CLEARLY DEFINE PROJECT SCOPE OF WORK

- The project scope is the work you have *agreed* to do for your client.
- The final project scope may have expanded from the original stated *project discovery requirements*
- The **Project Scope of Work (SOW)** represents the *agreed* work your client has contracted from you and your creative team.
- The Project Scope as described in the **SOW is part of your written proposal that was signed by, and agreed to, by your client.**



BAD SCOPE OF WORK = LOSS OF TIME AND MONEY

- If you skip Client Discovery and Project Scope Definition and start project with an Incomplete (Bad) brief
- Missing or incomplete information will prevent you from moving forward on project development
- You have to ask client for new details and WAIT for them,
- You'll lose more time, thus money, adding and editing what should have been provided in the first place
- Valued sub-contracts may become hesitant to work with you again – or charge a premium for the next gig
- **Costing YOU time and money**

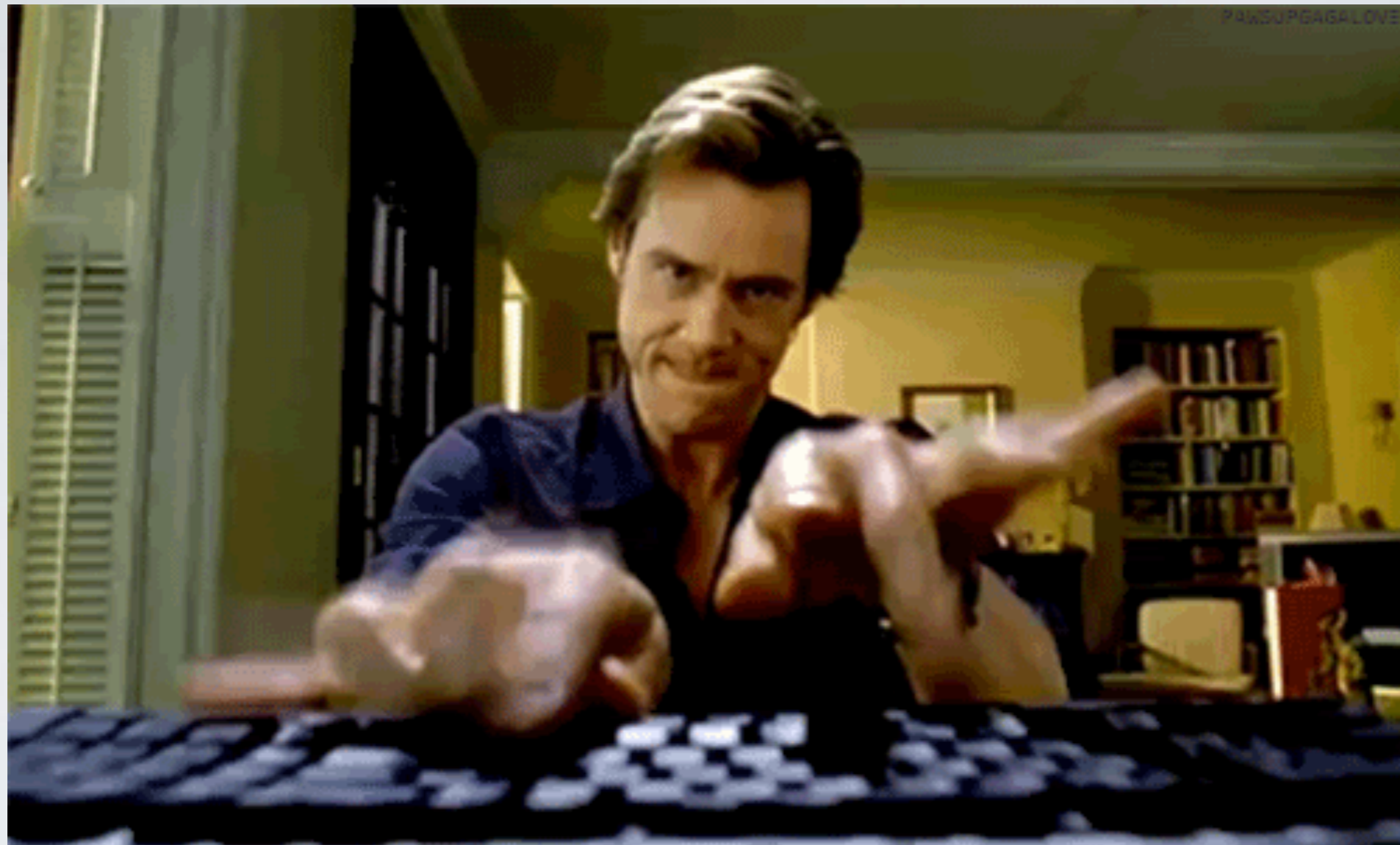
HOW TO PLAN / BUDGET FOR LIKELY REVISIONS

- Things always come up during a project
- Things the client forgot to mention
- Things the client didn't realize they needed in the first place.



SOME TYPICAL REVISION AGREEMENTS

- “Revisions are not included in the quote and are quoted when they are requested”
- “2 Rounds of revisions are included in the quote - this does not include extras outside of scope and is limited to small design and functionality changes”
- “20 small single action revisions are included in the quote - this does not include extras outside of scope and is limited to small design and functionality changes”



YOUR FINAL PROJECT SCOPE
IS IN WRITTEN FORMAT!
More About That Later...

UNCLEAR DEFINITION OF THE SCOPE AND REQUIREMENTS

- Not having a complete project brief (Scope of Work) is the fastest way to sabotage both you and your project.
- Most clients truly believe they know what they want. But once you start to define their processes it usually comes out (MIRACLE OCCURS HERE)
- You need to get the client to invest the time for a detailed discovery.



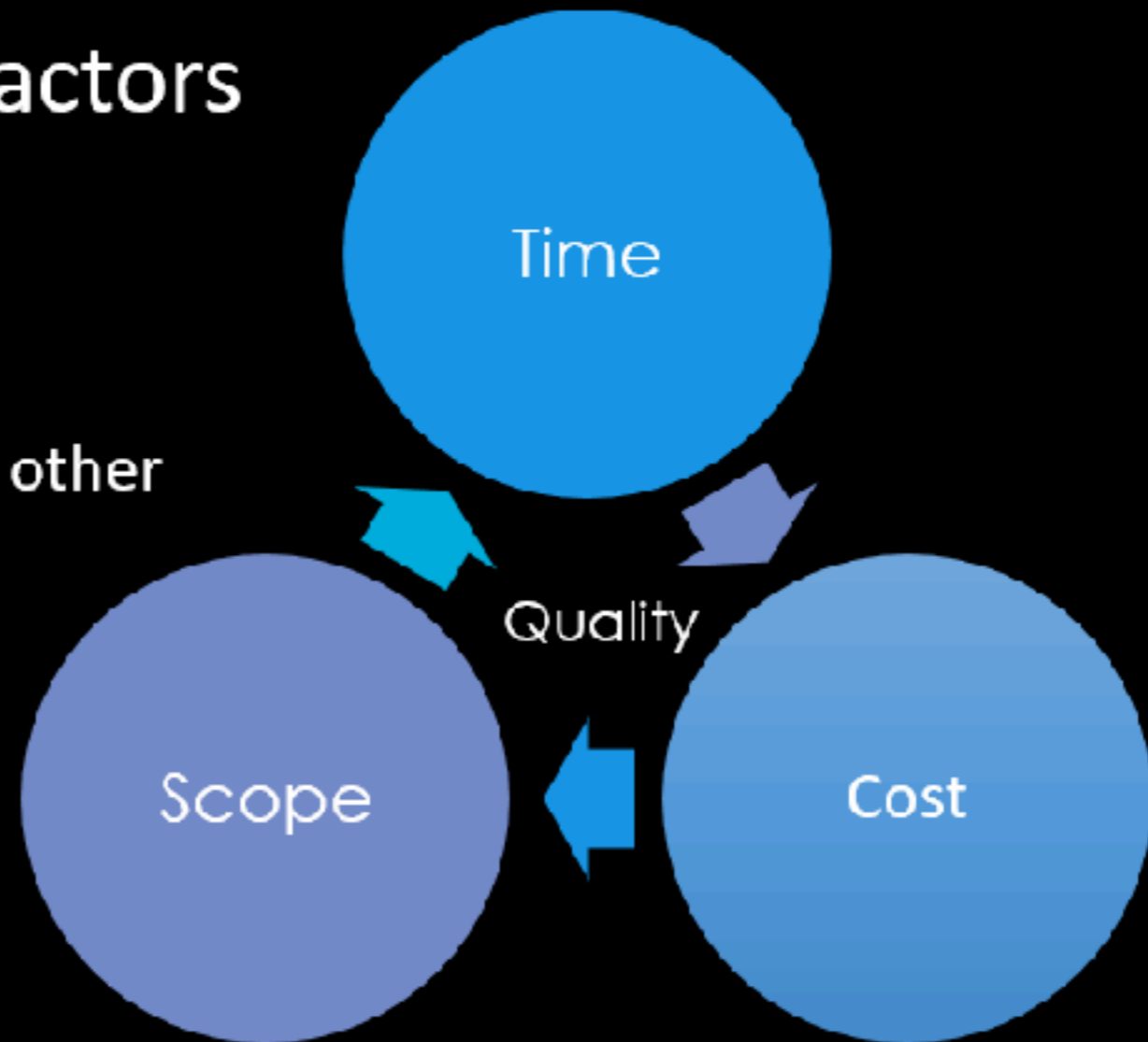
SAYING GOODBYE REALLY ISN'T HARD TO DO



- If a client is not willing to take the time to carefully delineate the scope of Work for their RUSH project
- ...Wish them God-Speed and move on...

Triple Constraint Factors

Changing one of the constraints will impact the other two constraints.

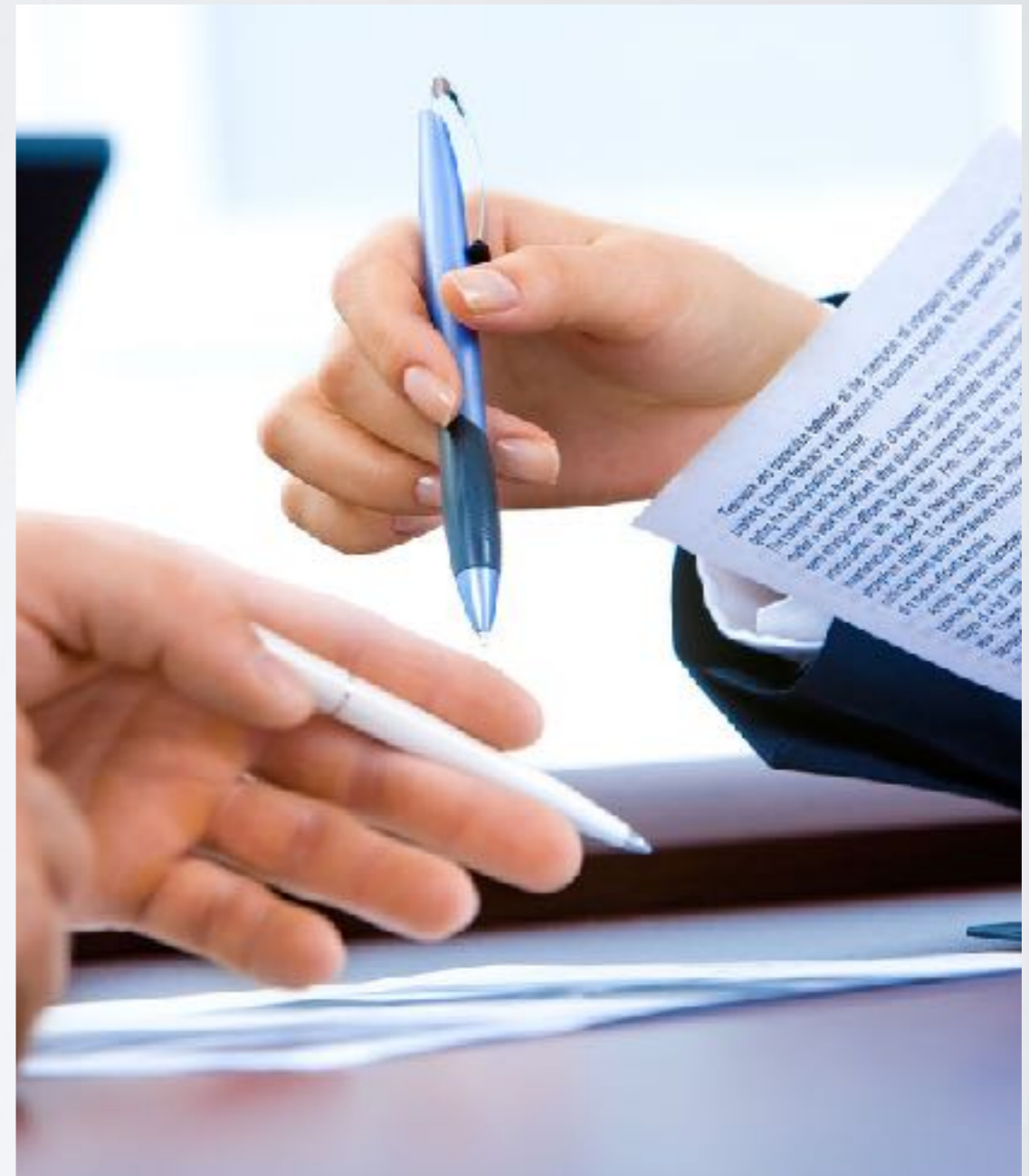


IF ONE THING CHANGES

Every Thing Changes

CUSTOMER ON-BOARDING

- A positive client on-boarding experience will define the ongoing relationship the client will have with your company.
- The On-boarding process should include educating the client about their on-going role and responsibilities within the project such as gathering and organizing content, reviewing and approving deliverables, managing change orders and testing the website.



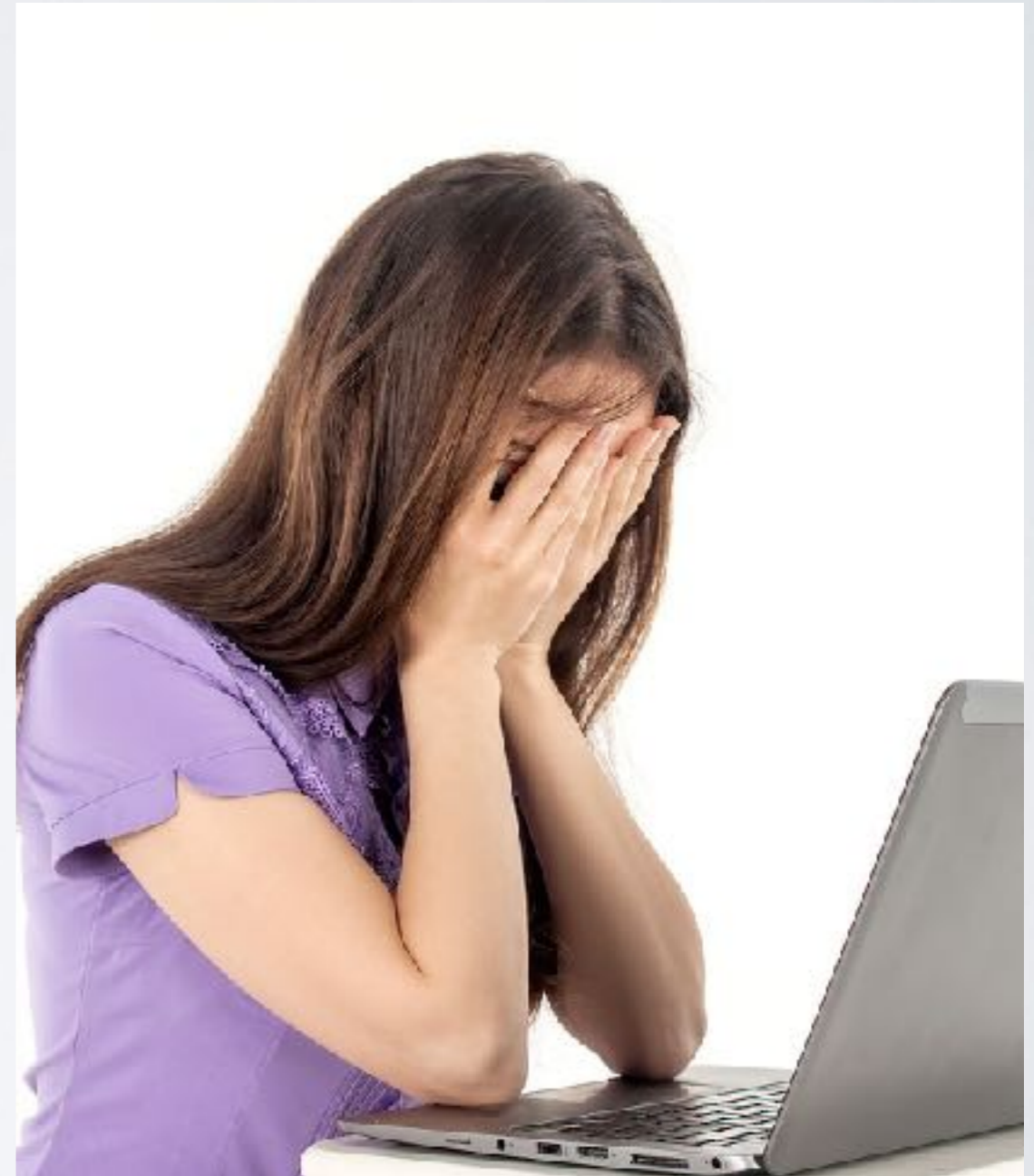


BUILDING AND IMPLEMENTING AN
EFFECTIVE ON-BOARDING PROCESS —
JENNIFER BOURN'S SETTING NEW CLIENT EXPECTATIONS

<http://www.bourncreative.com/implement-new-client-onboarding-process-set-expectations/>

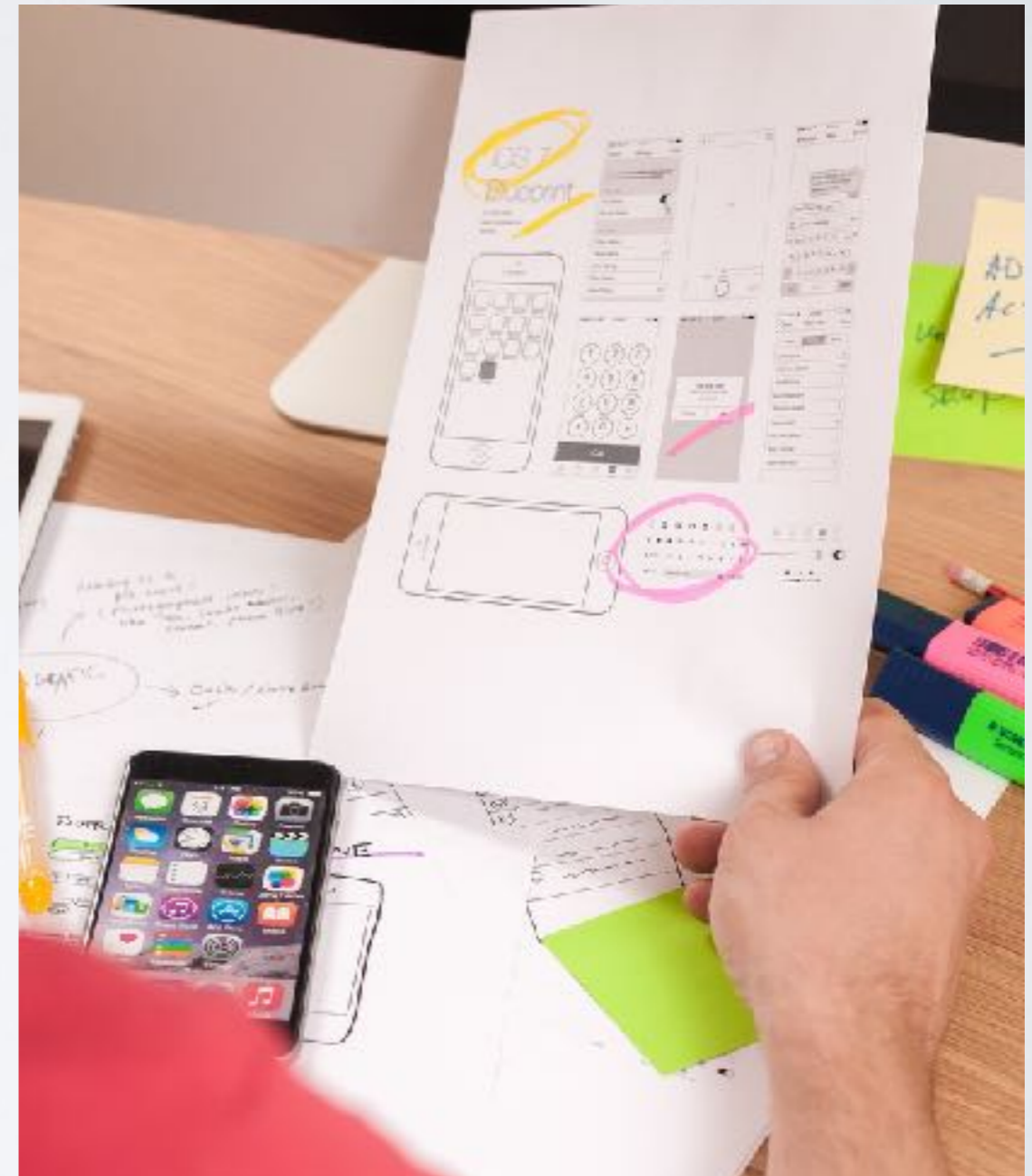
LACK OF CONSISTENT PROCESSES AND SYSTEMS

- Is your current on-boarding informal and inconsistent?
- Is your email inbox is stuffed with customer questions.
- Does dealing with client communication take time away from project production activities.
- Have you ever missed project critical information in a collapsed email string.



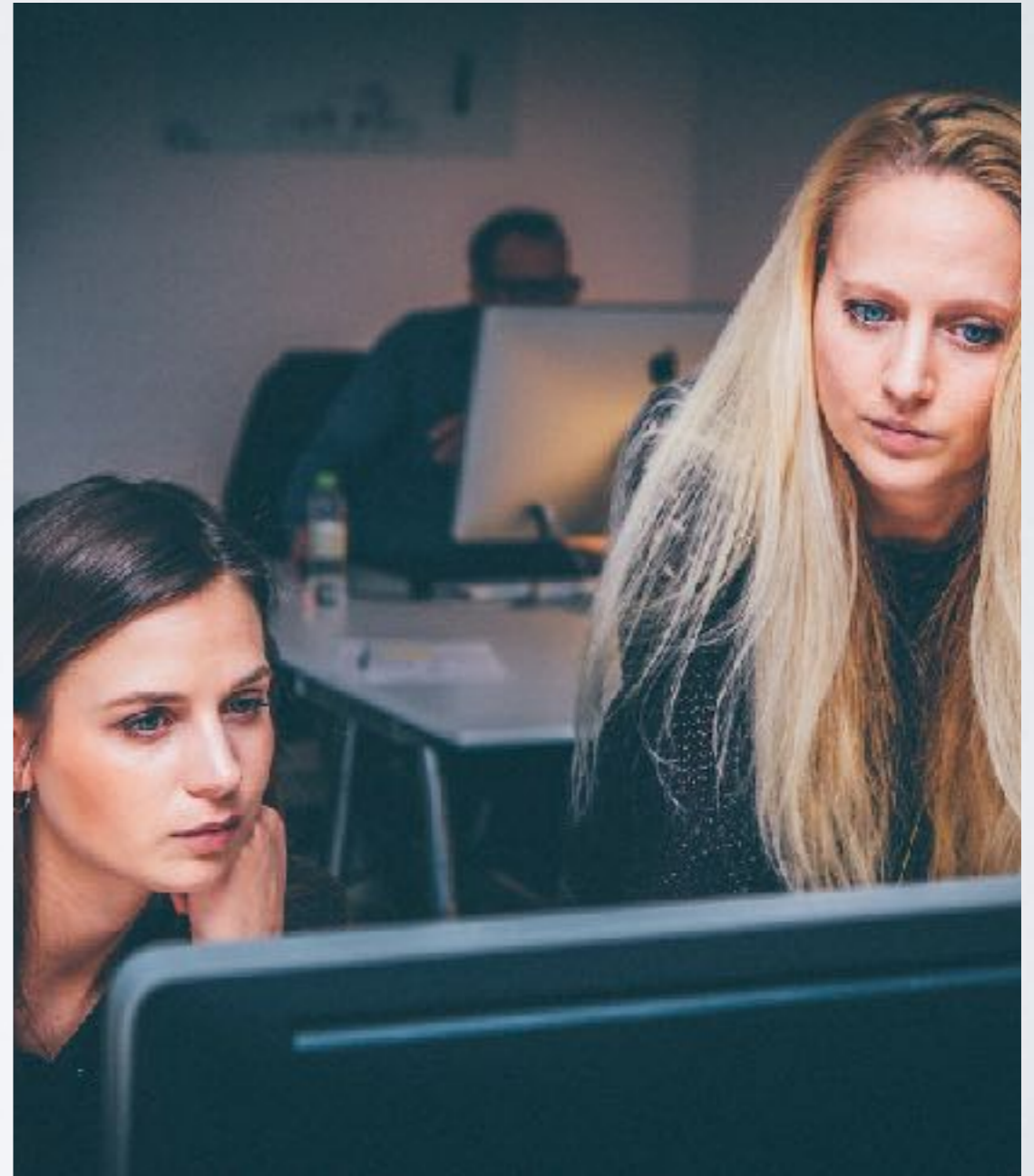
INCONSISTENT DESIGN/DEVELOPMENT PROCESSES AND SYSTEMS

- Yup! I am doing to go there.
- Not all designers have been trained to understand the importance of designing to a site's purpose and function
- An ill-conceived website design can double the cost of a build
- Request both a prototype and a wireframe as part of the designer's deliverables



INEFFECTIVE CLIENT RELATIONS MANAGEMENT

- You are a busy WordPress Professional
- Have you ever failed to return a client phone call?
- Have you ever missed an important client email.
- Have you 'forgotten' an important project requirement.



COMMUNICATING THE PROJECT MANAGEMENT PLAN

A PM can control scope creep by clearly explaining the role(s) the client will play in the “management” of the project such as:

- Provide input when requested
- Approve deliverables in a timely manner
- Being available to receive and review status reports
- Resolving conflicts
- Change Order Management



NOT STICKING TO THE AGREED SCOPE OF WORK

- Is “Yes, we could probably do that.” Your default answer to a client inquiry?
- OR Do you say, “Let me check the SOW to see where or *if* that item fits into the project Scope.
- If not, practice saying “Not now, but let's talk about that in *Phase Two*.”



LACK OF A GOOD PROJECT MANAGEMENT PLAN



Is Inviting a Train Wreck

WARNING #1

CLIENT RELATIONS MANAGEMENT

The Last Minute Addition...

Client contracted with you to build their website, and you have an agreed SOW based on client requirements...

When they review the pre-launch site they say: “I’ve been thinking about it, and we will need another page — just a really basic text page. That’s simple— right?”



OUT OF SCOPE “SIMPLE” STILL TAKES A CHANGE ORDER

- **There is no such thing as a “Simple Addition”**
- If this is not a contractually agreed-to change, the client has entered into the **‘Change Order Zone’** that place where we discuss how this change will affect the cost and the timeline.



WARNING #2

CLIENT RELATIONS MANAGEMENT

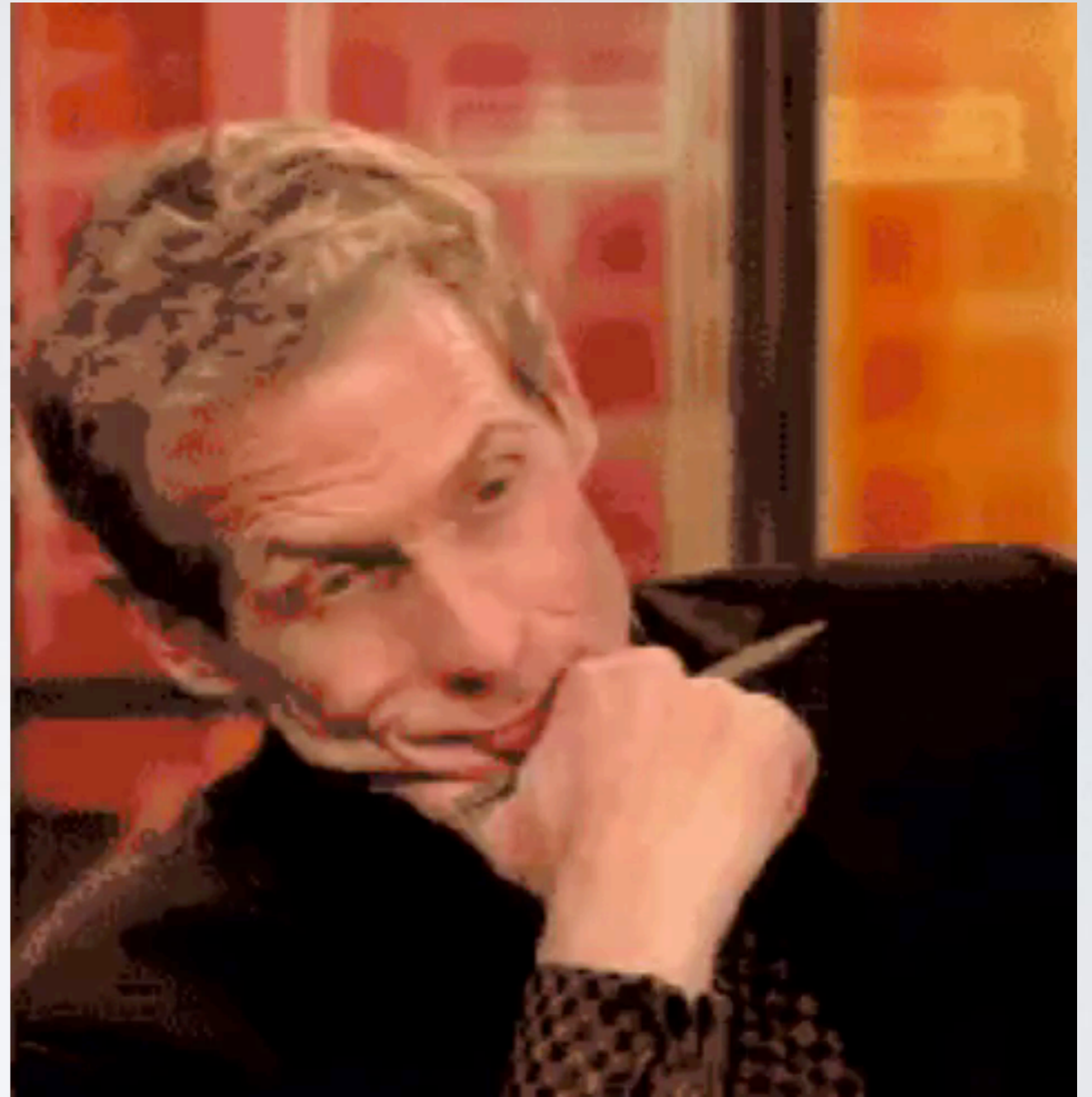
Out Of Scope Requests

- Your customer reviews the pre-launch site, looks up and smiles:
- ...*"I didn't realize before but I think this form needs a **couple of extra fields**".*



If It Isn't In The
Scope Of Work,
And We Don't
Have A Change
Order That
Approves The
Additional Costs

The Answer Is
No



CLIENT RELATIONS MANAGEMENT WARNING #3

Pre-Launch feature addition

- The Pre-Launch Checklist has been completed. All systems are GO!
- ...and your client takes one last look at the site before going live, and asks:
- ***“Hey, I just noticed something, Can we add our contact form to the bottom of this page?”***



WARNING #4

OUT OF SCOPE REWORK

"Are You Freaking Kidding Me" Scope Creep Example

- The client “rethinks” the custom plugin project upon final review and asks you to change how the plugin works...but doesn't think he should be charged any extra to completely rework the plugin?



THE WORDPRESS PRO KNOWS WHEN TO SAY NO



- “Actually that is not a simple rework. It will require several changes to the structure of the plugin that was not in our bid or Statement of Work.”
- We are happy to give you a bid for the requested rework”

WARNING #5

CLIENT RELATIONS MANAGEMENT

Prevent Profit Eating Pitfalls

- Some Clients Have No Shame
- They have No Problem asking for changes that can take hours, even days to complete...at no increase to the agreed upon SOW



PROJECT PROFITABILITY DEATH BY A 1000 CUTS



Unfunded, Out of Scope Client Requests can mount
up to UNPAID Hours of your time

WARNING #6

PREVENTING PROFIT EATING PITFALLS

- A new client calls you
- His HAIR IS ON FIRE
- This is RUSH JOB!!!
- No Time for Project Statement of Work
- We need this YESTERDAY!!!

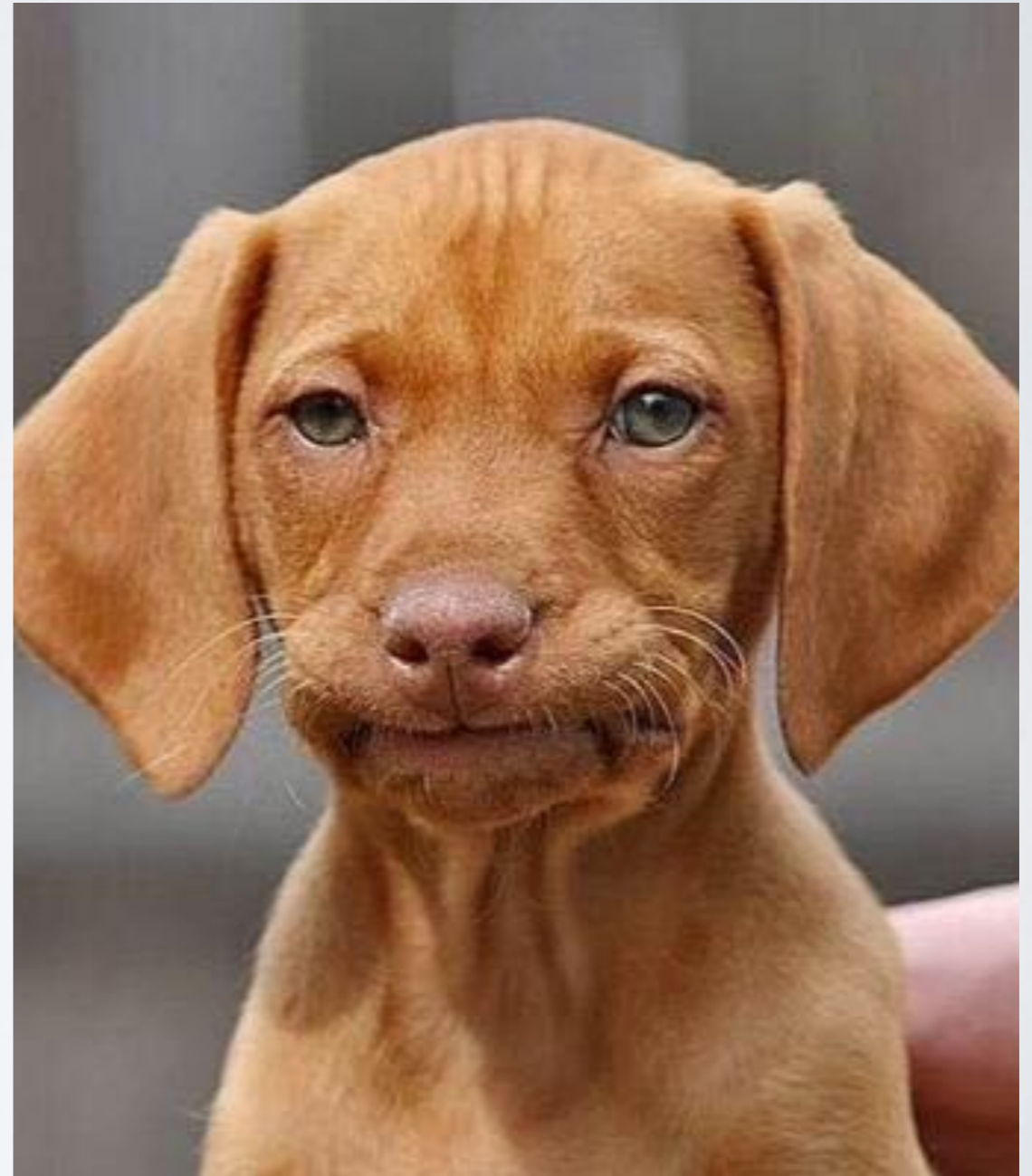


TRANSLATION: ANOTHER DEVELOPER JUST FIRED THEM

...And the Hair-on-Fire Client
will be upset because YOU
missed HIS deadline

...and will probably hassle you
about payment

...Just saying



KNOW WHEN TO FOLD 'EM



- Take a pass —even if you feel, I need another client this month...
- You do not need a client who will end up costing you money, peace of mind and professional relationships.

HOW TO COMMUNICATE WITH CLIENTS ABOUT SCOPE CREEP – IN A POSITIVE WAY!

The advantage of clearly communicating with a client

Client Knows Change of Mind
= Change of Budget & Time

Possible Disadvantage

Client budgeted changes lead carelessness because the client knows they can 'always' make changes



HOW TO COMMUNICATE WITH CLIENTS ABOUT SCOPE CREEP – IN A POSITIVE WAY!

In a helpful tone say...

“Yes, we can do that for you. Since this is a new requirement that we haven’t discussed before, I’ll need to quote separately for this – however, I think it’s a really good idea and will make a big difference to your website. The cost will be...”



WHEN A CLIENT REQUEST **IS NOT** SCOPE CREEP

Client work is requested and...

- A written change order is issued
- The budget is increased
- Delivery Time is extended
- More work + more money +
extended timeline = Profit
- **Happy! Happy! Happy!**



CHANGE MANAGEMENT PLAN HANDLING CHANGE ORDERS

A Change Management Plan should include:

- The definition of change and the different types of change that may occur
- Examples of project change
- The concept of the Change Budget
- Who can initiate a change request

CHANGE MANAGEMENT PLAN HANDLING CHANGE ORDERS

A Change Management Plan should include:

- How should the change request be documented and submitted
- Who will analyze the change request for project impact
- Who will approve or reject the change request
- When will the costs associated with a change be invoiced

SUMMARY REVIEW

HOW TO PREVENT SCOPE CREEP

- Set Clear Requirements
- Proactive project management
- Develop Consistent Processes and Systems and Stick to Them
- Produce and Use a Project Management Plan
- Write and Follow Written Project Scope

SUMMARY REVIEW

HOW TO PREVENT SCOPE CREEP

- Manage your Client On-Boarding Process Consistently
- Good and Open Relationship with the Client
- Being a Clear, Concise and Consistent Communicator
- Practice Consistent Client Relations Management

TOOLS TO PREVENT SCOPE CREEP

- [Bidsketch](#)
- [FreshBooks](#)
- [Slack](#)
- [Trello](#)



ADDITIONAL RESOURCES

- Keeping Scope Creep From Killing your Schedule and Profit Margin
- <https://handsonwp.com/keeping-scope-creep-from-killing-profit/>
- How to Write a Proposal
- <https://handsonwp.com/how-to-write-wordpress-proposal/>
- How to Use the Discovery Process to Writing a Winning Proposal
- <https://handsonwp.com/introverted-freelancers-guide-writing-winning-proposal/>



Presenter

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Introverted Freelancer, WordPress evangelist, trainer, consultant, curricula developer, author, unapologetic geek, unrepentant capitalist, lucky enough to do what I love every day. I've served as Austin WordPress Meetup co-organizer since 2010. With my husband, Nick Batik co-founded Pleiades Publishing Services in 1992 and Hands-On WordPress Training in 2010.

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