



Scope Creep: Identifying and Reducing this HUGE Project Management Pitfall

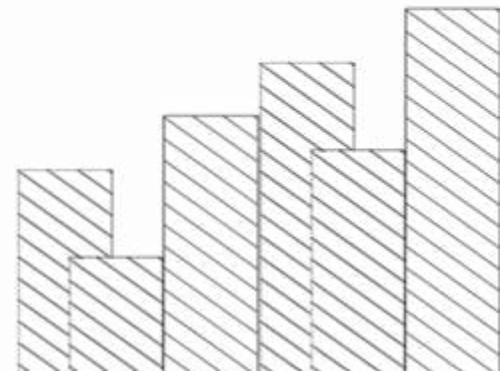
Presented by:

Anthony Fasano, P.E.

Founder of Engineering Management Institute

In partnership with **DAVIS & FLOYD**
PLAN | DESIGN | ENGINEER

March 18, 2024



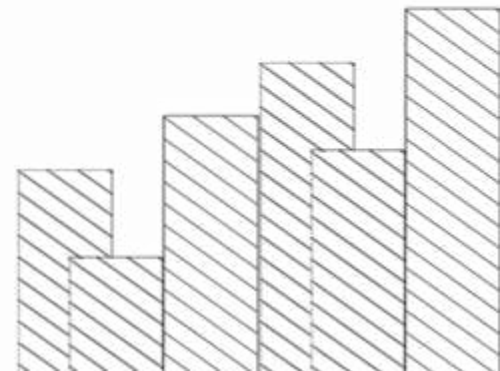
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Purpose and Learning Objectives

The purpose of this webinar is to provide you with strategies on how to **avoid or minimize scope creep** in your projects. In this session, participants will learn how to:

- Ensure the project scope is clear to all team members,
- Identify scope creep as early as possible,
- Notify clients of work to be done outside of the scope, and
- Approach a client in an “extra work” situation (this is way harder than it sounds).

“Nothing is less productive than to make more efficient what should not be done at all.”

Peter Drucker

PART II
Productivity
Making the Hours in the Day Go Further

The main thing is to keep the main thing the main thing.

—STEPHEN COVEY

Introduction – Anthony Fasano, PE

- B.S. & M.S. in Civil Engineering
- Licensed Professional Engineer
- Found success at a reputable firm at a very young age
- Attended iPEC – the top ranked executive coaching school in the world
- Wrote the best-selling book ***Engineer Your Own Success*** and started providing career coaching and speaking services to engineers





Poll Question

What best describes your current position?

- a. C-Suite (CEO, CFO, COO, etc.)
- b. Technical Professional, now in a management or executive position
- c. Human Resources or Talent Management
- d. Learning & Development
- e. Technical Professional, still doing mostly technical work
- f. Finance
- g. Other





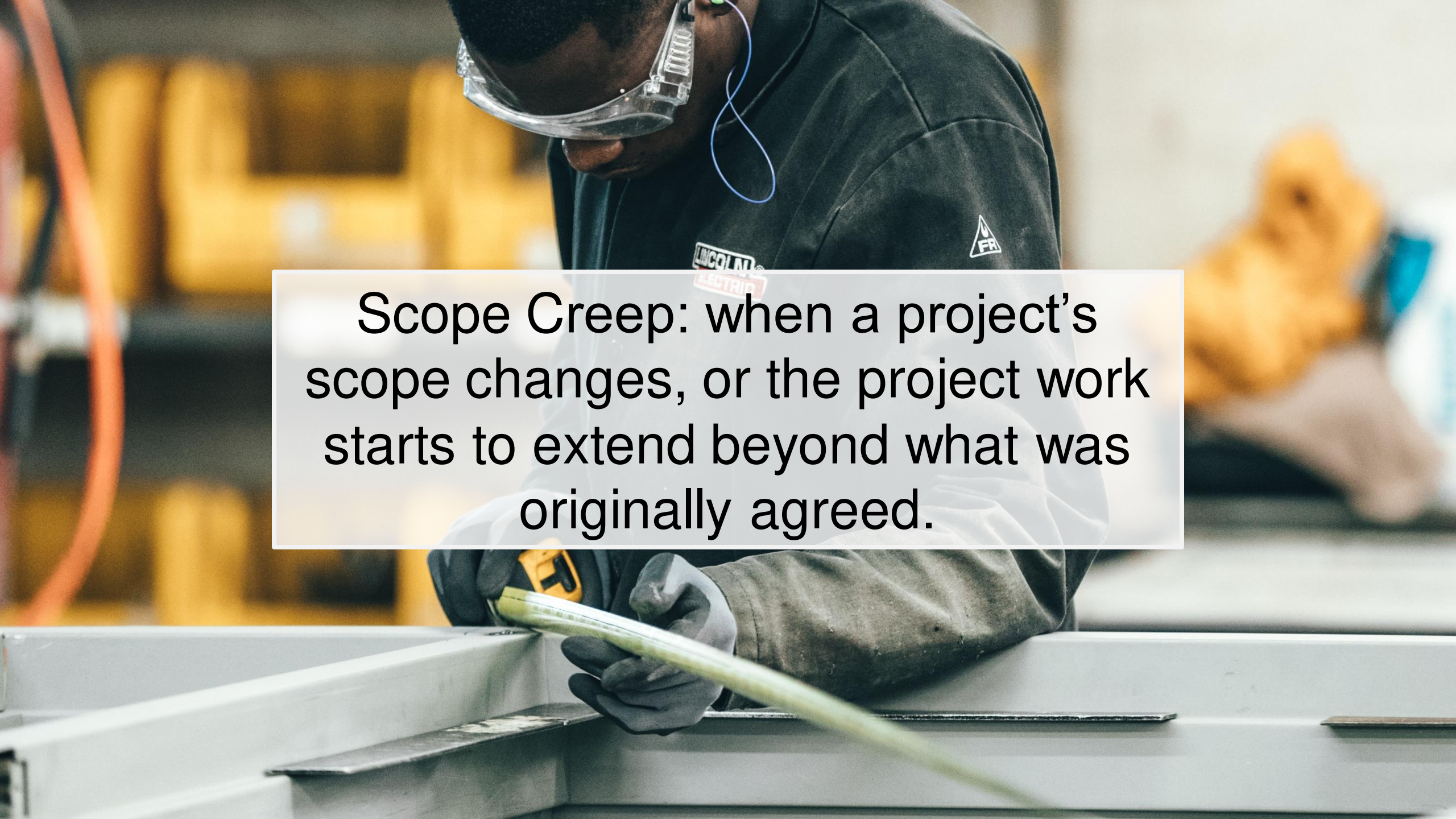
Scope Creep: What & Why?



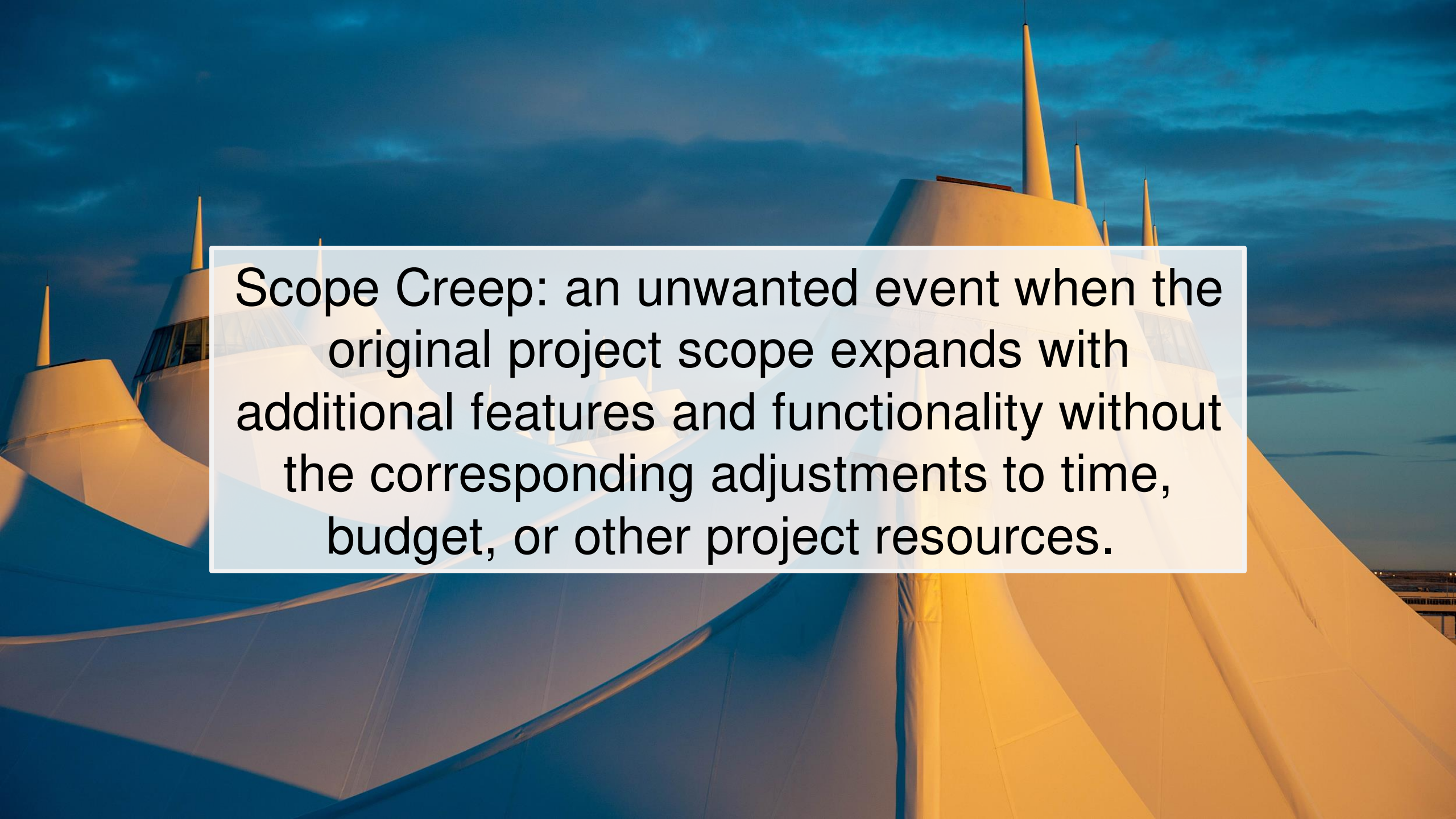
What Is Scope Creep, Anyway?




PROJECT MANAGEMENT ACCELERATOR - PM SKILLS COURSE



Scope Creep: when a project's scope changes, or the project work starts to extend beyond what was originally agreed.



Scope Creep: an unwanted event when the original project scope expands with additional features and functionality without the corresponding adjustments to time, budget, or other project resources.



What's the
difference between
Scope Creep and
Scope Change?

Defining Scope Creep and Scope Change

Scope Creep

Adding features and functionality (project scope) without addressing the effects on time, costs, and resources, or without customer approval.

Scope Change

A project management decision made by the parties involved in a project to change a feature, reduce or increase functionality, or adjust an overall project.

What Is the #1 Reason Why Projects Fail?

- Poorly defined scope
- Inadequate budget
- Client surprised by changes
- Lack of communication



Discussion

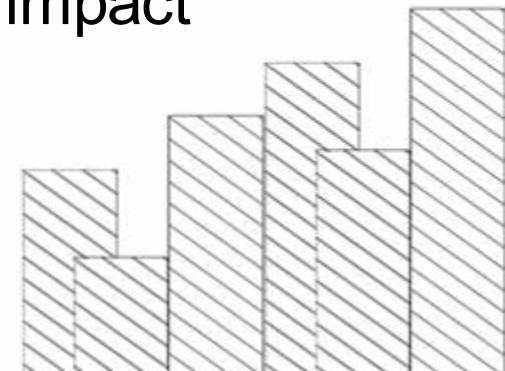


Why does Scope Creep happen?



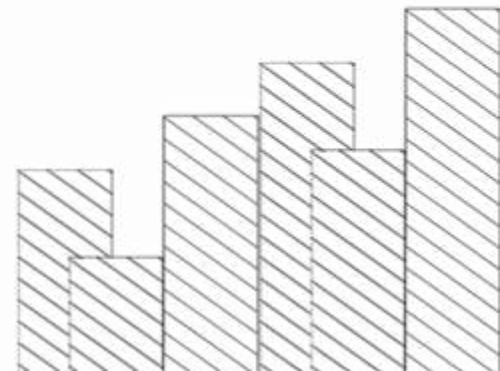
Causes of Scope Creep

1. Scope isn't as clear as it needs to be.
2. Team members aren't clear on scope and their part - AND their personal budget.
3. PM doesn't hold a kickoff meeting. Kickoff meeting topics: project scope, schedule, budget; client expectations; how to identify and handle out-of-scope work.
4. If new team members come onboard, PM doesn't make sure new members are fully briefed.
5. PM doesn't consider all the players who can cause or impact scope creep.



Causes of Scope Creep

6. Team members don't notify the PM that the client has asked them directly to execute a change.
7. Team members don't record time correctly: Wrong task, wait until Friday and try to remember, etc.
8. PM doesn't keep tabs on charges.
9. PM or team member overpromises.
10. We've allowed the client to fall into the habit of getting extra work "for free".



Examples of Scope Creep



Examples of Scope Creep





What's Scope Creep's Toll?

Type in Chat



How can we minimize or avoid
Scope Creep?





Four Steps to Reducing Scope Creep



A spiral-bound notebook with a blank lined page and a black pen resting on it. The notebook is open, showing the spiral binding on the left side. The page is white with light blue horizontal lines. A black pen is lying diagonally across the page. The background is a plain, light-colored surface.

Step 1 – Clearly identify the
Scope of Work

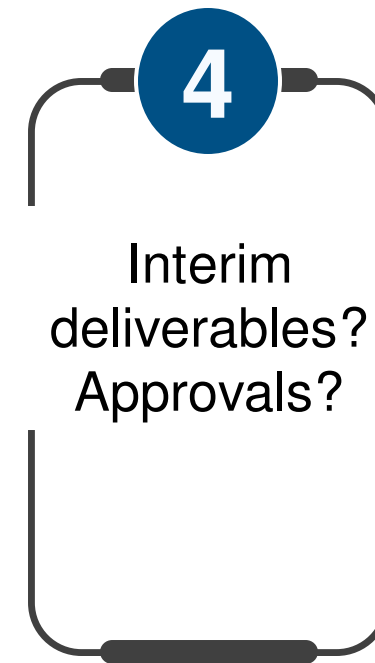
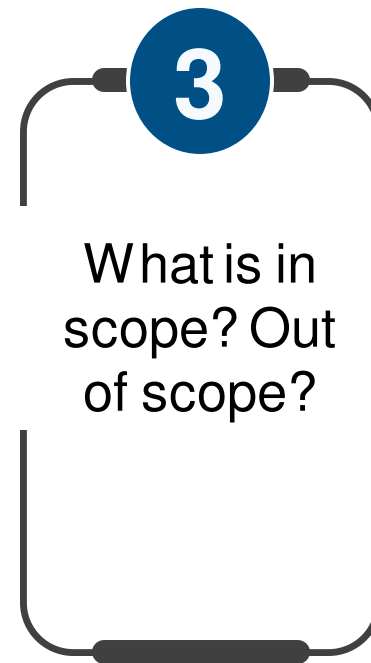
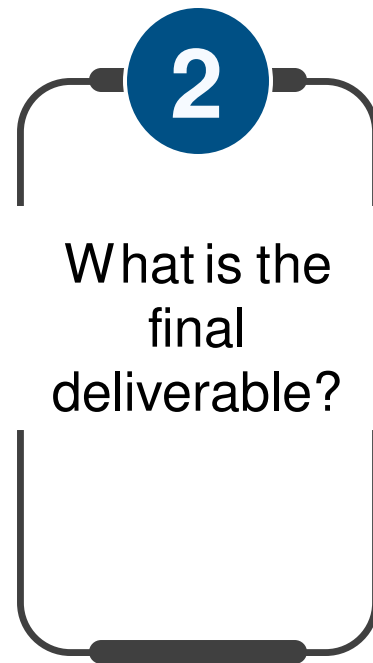
Scope:
The Fence Around
Our Project



A photograph of three business professionals in a meeting. A woman with long blonde hair is leaning over a desk, pointing at a document. A man in a white shirt and tie is looking down at a notebook. A woman with dark hair is also looking at the document. The scene is brightly lit, suggesting an office environment.

Verify with the client at the beginning of the project

Confirming Project Understanding: The 13 Questions



Confirming Project Understanding: The 13 Questions

5

Acceptance
criteria?

6

Stakeholders?

7

Timeline?
Flexibility?

8

Inter-
dependencies?

9

Budget?
Flexibility?

Confirming Project Understanding: The 13 Questions

10

Known obstacles?
How to help?

A blue circle with the number 10 is positioned at the top of a U-shaped frame. The frame has a horizontal bar at the bottom. The text "Known obstacles? How to help?" is centered within the frame.

11

Risk of NOT doing the project?

A blue circle with the number 11 is positioned at the top of a U-shaped frame. The frame has a horizontal bar at the bottom. The text "Risk of NOT doing the project?" is centered within the frame.

12

Constraints?

A blue circle with the number 12 is positioned at the top of a U-shaped frame. The frame has a horizontal bar at the bottom. The text "Constraints?" is centered within the frame.

13

What keeps you up at night?

A blue circle with the number 13 is positioned at the top of a U-shaped frame. The frame has a horizontal bar at the bottom. The text "What keeps you up at night?" is centered within the frame.

*Overwhelmed?
Break It Down!*



“The secret of getting ahead is getting started. The secret of getting started is breaking your complex, overwhelming tasks into small, manageable tasks, and then starting on the first one.”

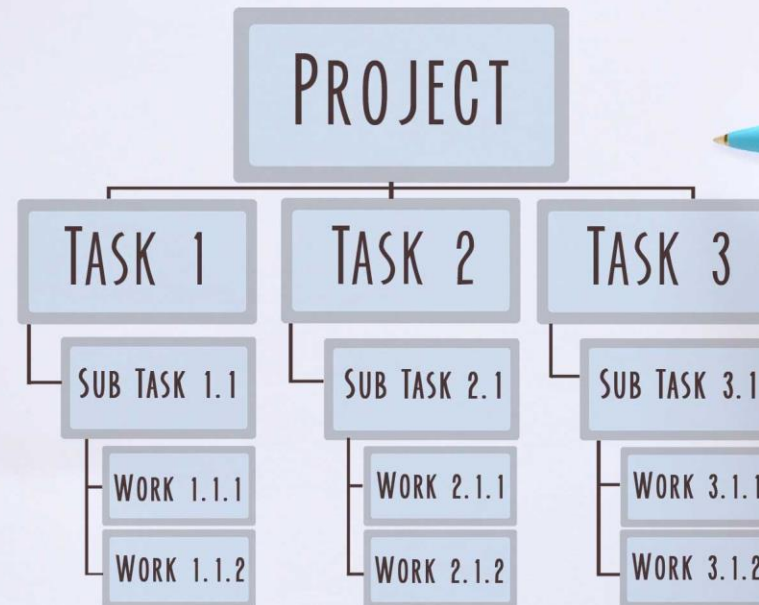
- Mark Twain



Task List

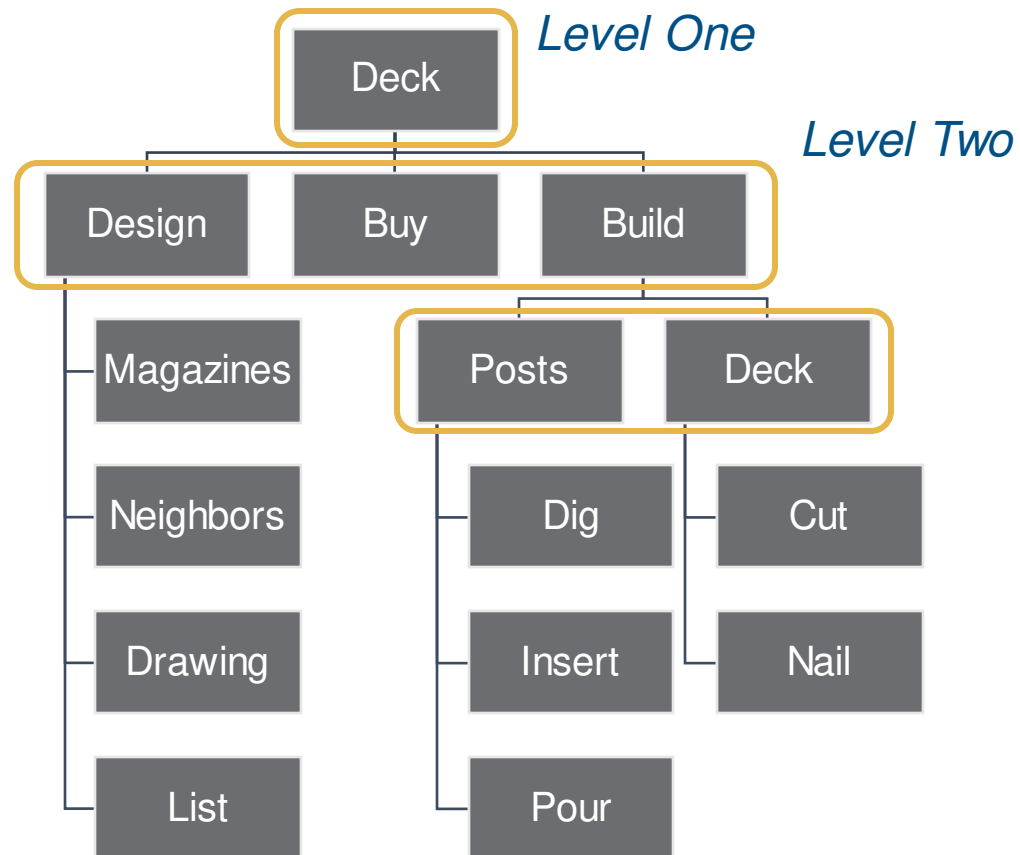
aka Work Breakdown Structure (WBS)

WORK BREAKDOWN STRUCTURE



Typical Task List Formats

Graphic



List

Deck

1. Design
 - a. Magazines
 - b. Neighbors
 - c. Drawing
 - d. List
2. Buy
3. Build
 - a. Posts
 - i. Dig
 - ii. Insert
 - iii. Pour
 - b. Deck
 - i. Cut
 - ii. Nail



Step 2 – Communicate the Scope of Work to the Project Team

Use a common project platform where team members can see the allocations for the project



Microsoft Project

Deltek®





Make sure the team understands the scope, how to head off scope creep, and what to do about scope creep if it might seem unavoidable

Hold Kick-Off Meeting(s)



Suggested Kick-Off Agenda Topics

Project
Scope

Project
Budget

Project
Deliverables

Client
contact(s)

Process
for scope
changes

Project
Meeting
schedule

Project
technical
issues

Project
contract
issues

Client
sensitivities

Example Kick-off Meeting Agenda

CALL-IN NUMBER IF YOU CANNOT ATTEND IN PERSON:

[Date]

[Time]

[Location]

Client: _____ Project Number: _____

Project Manager: _____ Note taker: _____

Timekeeper: _____

Attendees: _____

Please read: _____

Please bring: _____

AGENDA ITEMS

Topic	Presenter	Time allotted
-------	-----------	---------------

Project scope and proposal

Project budget; hours budgeted for each team member

Project deliverables; schedule for completion

Client contact(s); procedures for communicating with client

Process for identifying and analyzing scope changes

Project meeting schedule

Project technical issues

Project contract issues (e.g., allowable charges)

Client sensitivities

Project quality assurance procedures

Confidentiality requirements

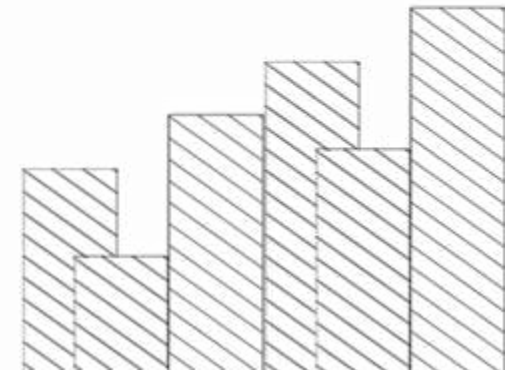
Interfacing with prime

Interfacing with subcontractors (if applicable)

Health and safety plan and procedures

Action items

Date of next meeting



A close-up photograph of a person's hands writing on a white document. The person is wearing a light blue button-down shirt. The right hand holds a black and silver pen, and the left hand rests on the document. The background is blurred, showing more of the person's torso and the desk.

**Step 3 - Create a Regular Scope
of Work Review Action Item**

Review project progress

- 1 Run or obtain a Project Summary Report from your accounting team.
- 2 Review the Job To Date (JTD) \$ Spent and Budget numbers.
- 3 Calculate the remaining budget available to complete the job.
- 4 Compare remaining budget to the estimated amount to complete the job.
- 5 Share bi-weekly status with the project team. Escalate issues as they arise and talk through your options.
- 6 If applicable, repeat bi-weekly reports throughout the remainder of the project.

Engage the client throughout the project



Review the following:

- Project overview
- Milestones and deliverables
- Scope and technical details
- Schedule and timeline

Type in Chat



How often are your project managers holding meetings?



Taming the Meeting Beast



“Time is money”...but

- If I steal your money, it's possible to repay you.
- If I steal your time, I've taken something that I can never replace.





Effective Meetings...

1. Achieve the meeting's objective...
2. In a minimum amount of time...
3. And leaving participants feeling they've accomplished something.



Meeting Process

Before	During			After
1. Plan	2. Start	3. Conduct	4. Close	5. Follow Up
<ul style="list-style-type: none">• Purpose• Participants• Methods• Time-indexed agenda 	<ul style="list-style-type: none">• Check in• Review agenda• Ground rules• Parking lot	<ul style="list-style-type: none">• 1 item at a time• Stay on time• Focus 	<ul style="list-style-type: none">• Decisions• Review action items• Clear parking lot• Agenda for next mtg• Set next mtg• + / Δ• Thank	<ul style="list-style-type: none">• Document (minutes) ASAP• File notes, etc.• Do action items





Meeting Agenda

Example Meeting Agenda

Subject: _____
Purpose _____ Date: _____
Location _____
Start _____ End _____ Total: _____
Attendee
1. _____ 5. _____ 9. _____
2. _____ 6. _____ 10 _____
3. _____ 7. _____ 11 _____
4. _____ 8. _____ 12 _____

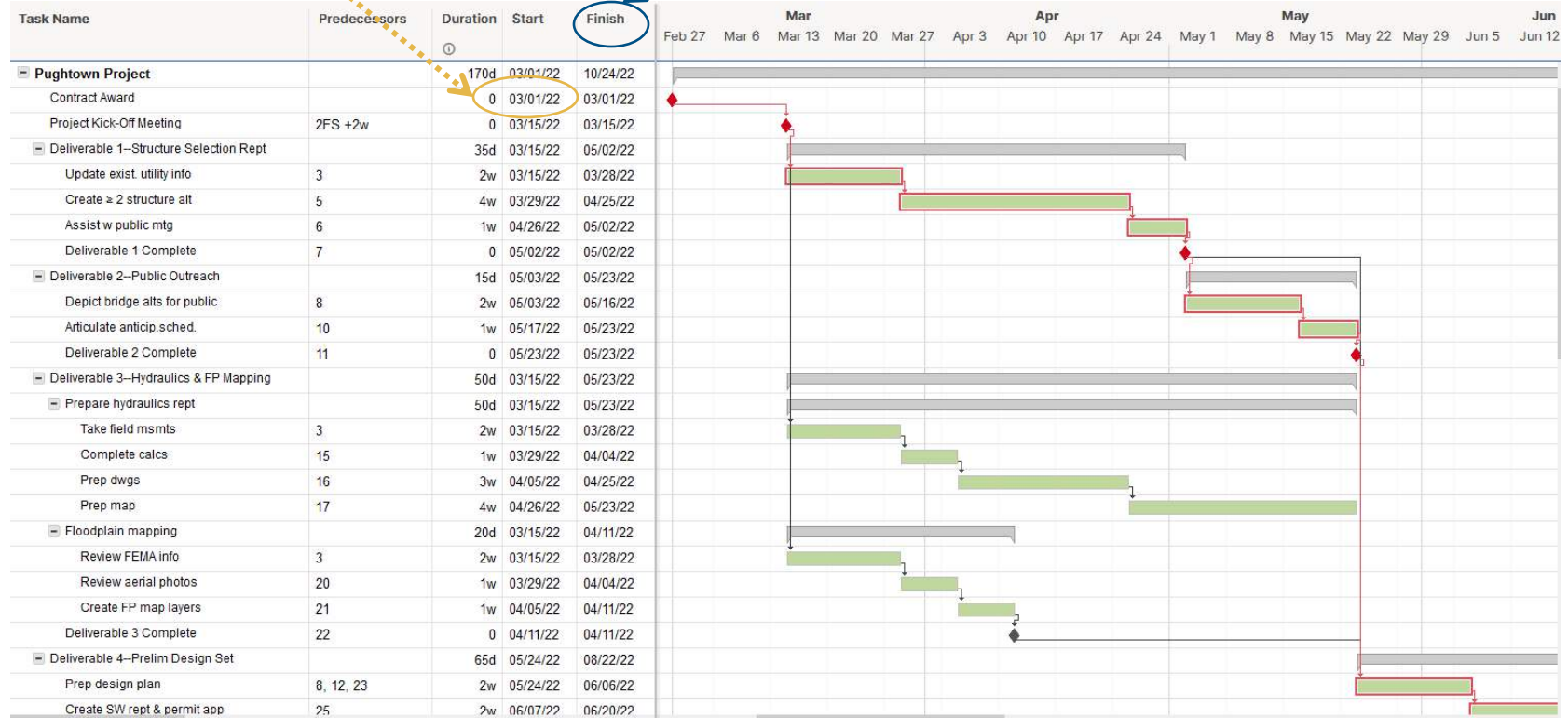
attend X avg \$/hr X mtg length X 2 = \$ _____

Planned Outcome(s)

	Agenda Items	Time	Person Responsible
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____
9.	_____	_____	_____
10.	_____	_____	_____
			Person Responsible
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

Set Start Date ONLY!
(1st task below summary task)

Do Not Touch!
Hide Finish Column!




Step 4 - Leverage Technology to Increase Visibility and Streamline Workflows

Record time correctly

- Do them daily
- Be honest and be accurate
- Descriptions - Generally describes what you did



Be cognizant that a Client may see what you write someday



Keep tabs on charges

10:48

< Back New Expense Entry Save

Employee	Steven Burns	>
Project	19-08 - PASADENA: Construction Documents	>
Expense	Travel:Mileage	>
Description	Travel	
Quantity	11.87	
Unit Cost	\$0.54	
Markup %	20%	
Charge Amount	\$7.69	
Total Cost	\$6.41	
Date	Jun 15, 2020	
Credit Card	Select Account	>
Billable	<input type="checkbox"/>	

[New Expense Entry](#) [Documents](#)

In Summary...

1. Clearly identify the scope of work
2. Communicate the scope of work to the project team
3. Create a regular scope of work review action item
4. Leverage technology to increase visibility and streamline workflows





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Questions?

*We appreciate
your feedback!*

