01 / Scope, made clear

Agree on the starting point

Copy this brief into your project document. Complete the fields in brackets and share it for review before starting work.

Scope brief

Project: [name or code]
Client and authorised approver: [name]
Objective: [specific intended outcome]
Deliverables: [quantity, format, dimensions or features]
Acceptance criteria: [how each deliverable will be checked]
Excluded: [tasks or formats outside the scope]
Client-supplied materials: [list and due date]
Schedule: [milestones, dates and dependencies]
Included revision rounds: [number]
What counts as a round: [one consolidated list of comments on the delivered version]
Price and payment terms: [reference to the agreed quote]
Brief version and date: [version / date]

Before you finalise it

Make deliverables countable or verifiable. Distinguish fixing a failure to meet the agreed requirements from adding a new requirement. Do not label a correction of your own error as extra work.

Using this kit

The PDF is a static guide; the included TXT files are editable. This material helps organise work. It does not replace a contract, signature or formal acceptance and is not legal advice.

02 / Scope, made clear

Record each change

Give every request an identifier. Keep the original scope and record subsequent decisions alongside it.

Change request

Identifier: [CR-001]
Date and requester: [date / name]
Request: [what should change]
Current scope reference: [affected deliverable or condition]
Proposed classification: [included / correction / potential extra]
Reason: [basis for that classification]
Estimated additional work: [tasks and hours]
Proposed additional fee: [amount and currency; state whether taxes are included]
Schedule and dependency impact: [specific change]
Options: [expand scope / replace a task / keep the agreed scope]
Status: [pending / approved / rejected / superseded]
Decision, date and approval reference: [record]
Resulting scope version: [version]

Working rule

Sending a proposal does not mean it has been approved. Record the authorised person’s response before treating extra work as agreed. If there is no response, keep the request pending.

Reusable log

The included CSV contains these fields and one fictional example. Add rows for new requests. Classification and status are entered manually; there are no automated reminders.

03 / Scope, made clear

Respond with options

Adapt these messages to the actual agreement. These are communication drafts; nothing is sent automatically.

Clarify a request

Thanks for your feedback. To assess this change, could you confirm [missing detail]? The current scope includes [deliverable]. I want to check whether this means adjusting that deliverable or adding [new requirement].

Propose additional work

I have reviewed request [CR-001]. Adding [work] requires approximately [hours], with a proposed additional fee of [amount and currency; taxes included or excluded]. Delivery would move from [current date] to [proposed date], provided I receive [materials or approval] by [date]. We could also replace [task] to keep the budget unchanged. Please let me know which option you prefer so we can update the scope before I begin.

Consolidate a revision

Please bring the stakeholders' comments together in one list and flag the essential changes so we can work from a single version. Under our agreement, this is round [number] of [total]. I will first review which items are included and which may change the scope.

Confirm a decision

I have recorded your response dated [date], reference [message or document]. Version [number] includes [change], with [agreed fee] and [agreed date]. Unchanged terms remain as set out in the referenced document. Please tell me if this summary does not reflect your decision.

04 / Scope, made clear

A request from start to finish

Fictional example. Figures illustrate the workflow; they are not recommended rates or customer results.

Original scope

Project: visual identity for Cloud Studio. Deliverables: one logo concept, PNG and SVG versions, and two revision rounds. Animation is excluded. The client supplies the name and references before the first milestone.

Request CR-001

After the first delivery, the client requests a five-second animation. It is classified as a potential extra because it adds an excluded format. Estimate: 3 hours at a selling rate of EUR 40/hour = EUR 120 before applicable taxes. Proposed extension: two working days. The price and dates both require agreement.

Decision and delivery

Initial status: pending. The client chooses to keep the original scope and postpone the animation. Record “rejected” and keep a reference to their response. Do not add EUR 120 to the quote or start the animation. The final delivery contains the agreed files, a version list and usage instructions.

Handover checklist

Check files and formats. Review the acceptance criteria. Separate outstanding items from future work. Record receipt and the client’s feedback. Keep the scope and decisions with the delivered version.

Next: work through the numbers

To calculate rates and quotes and track projects and payments, explore Precio Claro’s six-sheet XLSX kit. It is a separate paid product and is not included in this free resource.

View the pricing spreadsheet kit >