

Customer Promise and Scope Guard

Use the method

Translate a customer promise into a clear delivery boundary. Use this before accepting work and whenever a customer asks for something additional. The output is a written scope summary and an explicit decision about changes. This worksheet helps organize the conversation; the signed agreement governs the engagement.

- 1. State the result.** Describe what the customer will receive in observable terms. Replace broad promises such as "improve everything" with named outputs.
- 2. Define the boundary.** List included work, excluded work, quantities, revision limits, delivery format, and customer inputs. Record unresolved points before committing.
- 3. Agree on acceptance.** Identify who reviews, what they check, and when they respond. Confirm the delivery date and the assumptions that support it.
- 4. Capture the request.** For extra work, record the request in the customer's words and the reason. Compare it against the agreed scope.
- 5. Decide before doing.** Choose included correction, approved change, deferred request, or declined request. For a change, document effects on deliverables, schedule, and commercial terms in the appropriate approval record.
- 6. Confirm and update.** Obtain the required approval, update the working scope, and tell the delivery owner which version governs the work.

Worked example

Illustrative promise: deliver three documented office procedures in Word with one review round. The customer provides current instructions by Monday and names one reviewer. Acceptance checks that each procedure covers the agreed task and contains the required steps.

Exclusions: employee training, system configuration, and additional procedures. Delivery date depends on receiving the inputs and review comments when agreed.

A request for two additional procedures is recorded as CH-01. The owner evaluates added effort and schedule, prepares a change for customer approval, and waits for the required authorization before starting it.

A missing agreed step in one original procedure is a correction within scope. It is not automatically treated as an extra request.

Before you put it to work

- ☐ The customer result can be checked against named outputs.
- ☐ Inputs, exclusions, and revision limits are explicit.
- ☐ The governing scope version is identifiable.
- ☐ Extra work begins only after the required change decision.

If the problem keeps returning

If scope disputes repeat, improve the promise before the next sale. Add the ambiguous output, assumption, or exclusion to the scope conversation and confirm it in writing.

Connect the tools

Use BO-01 for the offer and BO-02 for the delivery handoffs.

First use

Use the worksheet on the next page for one real task. Complete the decision fields, name the person responsible, and choose a review date. Duplicate the worksheet when you need another record.

Working worksheet

Name or team _____ Date _____

Customer and governing record

Customer, delivery owner, agreement or scope reference, and current version.

Promise and included outputs

Result, quantities, format, revision allowance, and delivery date.

Exclusions and assumptions

What is outside scope, customer inputs, dates, and dependencies.

Complete and review

Acceptance criteria

Reviewer, checks, response window, and evidence location.

Change request and effects

Request ID, work requested, reason, disposition, and deliverable schedule or commercial effects.

Authorization

Required approver, approval evidence, and governing scope version.

Review after use

Which request was a correction and which changed scope? _____

What ambiguity caused the disagreement? _____

What needs to be clarified in the next scope summary? _____

Who must receive the updated boundary? _____

Next action _____ Owner _____ Due _____