

Briefing note

Project scope: making sure it's understood

AVOIDING THIS IN THE FUTURE

This situation arose from a simple presumption by our client. They were used to dealing with larger clients with detailed knowledge of contractual matters about consultancy. It was simply presumed the SME would have similar experience. The third party, on the other hand, assumed our client "knew what they were talking about", and signed up thinking that what they wanted matched what was on offer. We assumed our client would explain the scope clearly. Of course, what should have happened was this: our client should have fully explained the scope of the services on offer. Once that did happen, the third party duly understood the scope of the services and was able to tell us what they really needed.

A LESSON-LEARNT

In a sub-contract situation, we now insist on proof that the end user understands our scope. We have always done that as standard where we deal directly with clients and now it's part of our quality systems to make sure it happens in sub-contracts.



We were asked by a client to develop options for treating effluent for a third party. Now, BWC goes to great lengths to make sure the scope of any work we do is as clear as it can possibly be but in this case the project had already started and the third party had apparently agreed to a scope that had been issued by our client.

Data sets were analysed and options were developed. Graphs were plotted and reports written. The third party absorbed our outputs. And then decided there was a problem. What we had delivered was not what they thought we were going to give them. This really surprised us because what we delivered matched the project scope exactly. Ever eager to learn, we investigated what had happened. It didn't take long to find out that our client had not explained the scope to the third party in detail. The third party is an SME, we are an SME, but our client is much bigger.

This was a very valuable lesson for all concerned. Our client wasn't that familiar with dealing with SMEs and simply assumed the scope would be understood. The third party wasn't used to dealing with consultancies (let alone larger consultancies) and hadn't fully read or fully understood the project documents. We assumed, wrongly, that our client had made sure the third party understood the scope. Lack of one vital step led to a tense situation. Thankfully it was resolved amicably and professionally and the third party received the help they needed.

The lesson here, however, is to always make sure the end client fully understands the scope of the services on offer. We updated our procedures to cover this. Consultants of the world – make sure you do too!

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