

Engagement Lead Development Series

Session 4: Managing Scope Creep Before It Manages You

Monthly Workshop Series — 90 minutes | In-person or virtual with breakout capability

Where This Fits in the Series

This session builds on Session 3 (Setting Expectations in the Kickoff Meeting). Participants now shift from *preventing* misalignment to *catching and correcting* it once a project is underway — one of the most common and highest-stakes challenges engagement leads face.

Learning Objectives

By the end of this session, participants will be able to:

- Recognize the early warning signs of scope creep before it derails timeline or budget
 - Apply a shared framework for naming scope changes with clients without damaging the relationship
 - Practice redirecting an in-the-moment scope request using a consistent team "script"
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Agenda

Time	Segment	Format
0:00–0:10	Welcome & Recap	Large group
0:10–0:30	Structured Discussion: "Where Did This Go Sideways?"	Large group discussion & debrief
0:30–0:35	Framework Introduction: The 3-Question Scope Check	Facilitator-led
0:35–0:65	Role-Play Scenarios	Breakout rooms (groups of 3)
0:65–0:80	Breakout Debrief & Cross-Group Share-Out	Large group

Time	Segment	Format
0:80–0:90	Commitment & Close	Individual reflection

1. Structured Discussion & Debrief (20 min)

Prompt for large group: "Think of a time a project's scope quietly expanded and no one flagged it until it was a problem. What was the first sign — and why didn't it get named in the moment?"

- Facilitator captures themes on a shared board (e.g., "client asked for 'one small addition,'" "team didn't want to seem inflexible," "no clear owner for saying no")
- Debrief question: *What would need to be true for someone to catch this earlier next time?*

This surfaces the group's real, lived patterns before introducing a framework — so the framework lands as a solution to a problem they just named themselves, not an abstract best practice.

2. Framework Introduction (5 min)

The 3-Question Scope Check, introduced as a simple script the team can use consistently:

1. Is this inside what we originally agreed to solve?
2. If not, does it need a scope conversation now or can it wait for a formal change order?
3. Who owns raising that conversation — and by when?

3. Role-Play Scenarios (30 min, breakout rooms of 3)

Each trio rotates through three roles: **Engagement Lead**, **Client**, **Observer**. Two scenario cards per group, ~10 minutes each including feedback.

Scenario A — The "Quick Favor" A client casually asks for "one more report" during a status call, framing it as minor. The engagement lead must acknowledge the request, apply the 3-Question Scope Check out loud, and propose next steps — without sounding like they're refusing to help.

Scenario B — The Slow Creep A client has made three small unlogged requests over two weeks. The engagement lead has to open a conversation naming the pattern (not just the latest request) and propose getting back on track.

Observer's job: Note one thing the engagement lead did that kept the relationship warm, and one moment where the scope language could have been clearer. Share both in the 2-minute in-round feedback window.

4. Breakout Debrief & Share-Out (15 min)

Each group shares one moment that felt hardest to navigate and how they worked through it. Facilitator connects patterns back to the framework and addresses any gaps.

5. Commitment & Close (10 min)

Individually, participants write down:

- One current project where scope may already be drifting
- The specific question from the framework they'll ask this week

Facilitator collects (optionally, anonymously) one commitment from each participant to reference at the start of next month's session — reinforcing the progressive, building-block structure of the series.

Facilitator Notes

- Keep role-play scenario cards realistic but not tied to any actual client — pull composite details from common patterns, not specific accounts
- Rotate who plays "Client" across sessions so everyone gets practice on both sides
- The consistent 3-part rhythm (discuss → practice → commit) repeats across every session in the series, which is part of what builds the shared language and comfort with the format over time