

Change-Order / Scope-Creep Checklist

One-page mid-project money defence for UK freelancers & sole traders

Free lead magnet — not legal advice. Templates and checklists only. Adapt to your practice; seek professional advice for contracts. A fuller Scope Guard pack may be offered later via the OpsKit Digital store when available. No purchase required to use this page.

1. Pause before you say yes

- ☐ Re-read the original proposal / SOW / email brief
- ☐ Classify: in scope, clarification, or new work?
- ☐ Estimate hours or fixed fee before committing in chat
- ☐ Avoid “sure” on Slack / WhatsApp with no paper trail

If >~30 min, or changes deliverables / timeline / price → change order.

3. Classify the impact

- ☐ New deliverable
- ☐ Changed deliverable
- ☐ Extra revision round beyond the proposal
- ☐ Timeline change (bring forward / delay / new milestone)
- ☐ New third-party / access dependency
- ☐ Out of scope entirely (different service than sold)

Rough effort: ☐ under 1 hour ☐ 1–4 hours ☐ half day+ ☐ needs re-quote

4. Decide: absorb, amend, or decline

Option	When	Action
Absorb	Tiny goodwill, under ~30 min	Confirm in writing — no extra fee
Amend	Material time, money, or risk	Send change-order note <i>before</i> starting
Decline / defer	Wrong fit or kills margin	Offer later phase or separate quote

5. Short change-order note (paste / adapt)

Hi [Name], thanks for the request to [short description]. That's outside the current scope for [Project].

Proposed change: [what you will do] | **Extra fee:** £[amount] (or [n] hrs at £[rate]) | **Timeline:** [none / +X days] | **Payment:** [on approval / add to final / 50% now]

If you're happy, reply “approved” and I'll proceed. Or we can park this for a later phase. — [Your name / trading name]

- ☐ Clear written approval
- ☐ Fee & dates in the thread
- ☐ Tracker / calendar updated

6. Protect the next project

- ☐ Revision cap in proposals (extra rounds billed / change-ordered)
- ☐ Out-of-scope list + written change process
- ☐ Know Late Payment of Commercial Debts (Interest) Act 1998 for overdue fees — not a substitute for change orders

2. Capture the request

Date		Client	
Project		From	
Ask			

Quick red flags

“Can you just...”	Pause → classify → change order if material
Scope only on a call	Same-day written summary
“Fee later”	Do not start until fee/timeline agreed
Endless “final” tweaks	Point to revision cap; offer paid round