

Scoping

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Setting a Scope

In general:

- Establish a timeline – Projects to be completed between X and Y date.
- Establish clear deliverables – for example: 1 original draft, and 2 revisions. This concept is scalable. If you have multiple deliverables, either deliver everything at once or apply the “review round” concept to each. 1 original/2 revisions is industry standard. Be careful to include and breakout concept and wireframe and/or animatic rounds.
- Define the specifications of those deliverables – resolution, frame rate, codec, format, etc
- Propose a project timeline, knowing that there will be some back and forth there and there is a certain degree of acceptable flex that breaks the “final timeline.” I’ve never worked on a project where the timeline didn’t change constantly throughout the project.
- Include obvious, high-level, caveats in-line

Example Scope Breakout

You can use the model below for most projects and replace, add, or subtract elements to make it specific to your project. If you’re doing a Projection Engineering Design, for example, you might want to include rounds for drafting, or systems’ diagrams, or R&D, etc, etc.

- **Deliverables**
 - Boards 1 Original, 1 Revision
 - Animatic 1 Original, 1 Revision
 - Final deliverable – 1x 90s animation 1920x1080, Apple Pro Res 422, 24fps
 - 1 Original Draft, 2 Revisions
- **Timeline – August 1st through October 20th, 2024**
 - Project Kick Off August 1st
 - Boards R1 8/15, consolidated feedback due 8/19 EOD
 - Boards R2 8/30, consolidated feedback due 9/4 EOD
 - Animatic R1 9/10, consolidated feedback due 9/14 EOD
 - Animatic R2 9/20, consolidated feedback due 9/25 EOD
 - Animation R1 10/1, consolidated feedback due 10/4 EOD
 - Animation R2 10/10, consolidated feedback due 10/15 EOD
 - Animation R3 Final 10/20
 - Additional time or versions will be budgeted on a case by case basis
- **Assets**
 - Stock, Voiceover to be provided by client.
- Changes outside of defined review cycles will be handled case by case.

That last point there – notice how I’m not saying “change order?” People see “change order” and they get a bad taste in their mouths. Instead, I like to soften the language. Given the amount of reviews in this example, additional rounds are unlikely – and if it’s something minor, you generally

give a pass. Read more about change orders [here](#).

Once you have this breakout clear in your mind, you can apply hours to each round and then create a rate based on those hours. Remember to add a wide margin on top as contingency (and as... margin). Then, track your project hours to make sure you're on track and that you've budgeted appropriately. This skill is worth quite a few bucks and is worth getting good at!

Also, once you have an established and trusted relationship with a client this can become quite casual.

Change Orders

Generally, you'll give your clients many freebies over the years. This is critical to good client-vendor relationships. They hook you up with being flexible about some aggressive deadline, and you are flexible with a word change here or there to the motion graphics.

Here's some boiler plate language you can use if the changes are significant:

"Hi Client,

Thanks for your notes. This change is significant enough for us to evaluate additional hours. I expect it to cost an additional \$X to \$Y. Would you like to move forward with the changes?"

Obviously, if timing is critical, **make this a phone call**. Be prepared with an estimate, or a range of costs. People don't like when things cost more than they expected! Good luck...