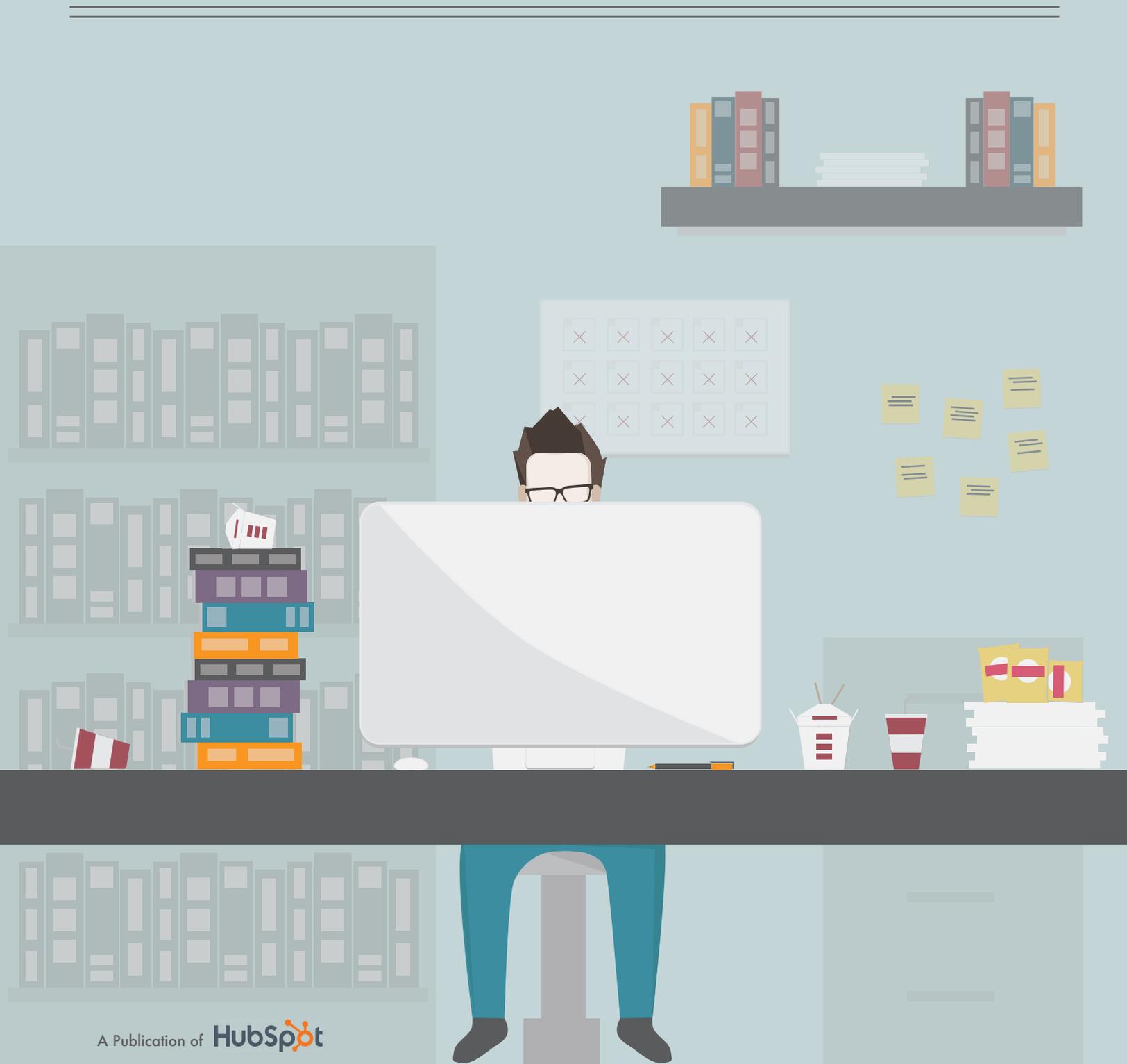


The **ULTIMATE GUIDE** to **INBOUND SCOPE CREEP**

How to ensure agency profitability and on-time client deliverables





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THE ULTIMATE GUIDE TO INBOUND SCOPE CREEP.

Written by

Patrick Shea

As Partner Marketing Manager at HubSpot, Patrick oversees the creation and execution of training and co-marketing programs designed to help HubSpot's Partner Agencies scale and grow their online business.



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Introduction

As a veteran marketing agency, you're no stranger to the classic condition known as "scope creep." You know — that uncomfortably familiar condition where a "cleanly" defined project has somehow exceeded its boundaries and suddenly you find yourself on the short end of the stick. The client might be happy, but your bottom line sure isn't.

As more and more agencies embrace inbound marketing and its methodology, we thought you'd find it helpful if we shared what we and our partners have found are the most likely scope creep scenarios in an inbound marketing engagement, the underlying causes for scope creep, and how you can avoid it in the future from experts who've been there and creep'ed that.

Inbound Marketing Methodology & Tactics

Before we get started, let's take a look at inbound marketing's methodology and its tactics to get some context for our discussion.



Inbound marketing's tremendous success is due to its laser focus on creating and sharing content aimed at attracting specific buyer personas and satisfying their needs for useful information at the different stages along their decision journey. If successful, people go from being complete strangers to delighted promoters of your brand.

Because most [buyer personas'](#) journeys aren't as neat or as simple as a straight line from the top of your funnel to its bottom, an inbound marketing engagement requires lots of strategic thinking, planning and above all — getting inside the buyer personas' minds. Doing so lets you identify their information needs at all the different twists and turns along that journey.



The more buyer personas (and influencers), and the longer or more convoluted the decision process, the more robust the inbound marketing strategies and the greater the volume of tactics needed, in order to earn their business.

Implementing a successful inbound marketing plan means creating buyer persona narratives, editorial calendars, social media calendars, campaign calendars, calls-to-action/offers, and lead nurturing workflows.

These in turn require long-tail keywords, blog posts, social media channels, key influencers to follow/interact with, monitoring streams, guest blogging and content syndication opportunities, video shorts, tutorials, white papers, eBooks, special reports, tools, eNewsletters, lead nurturing emails, CTA graphics, landing pages, forms with progressive profiling, smart content, analytics / reports, CRM data exchanges, and the list can (and could) go on and on and on...

...as a result, inbound marketing is rife with scope creep opportunities.

The 13 Most Common Scope Creep Scenarios

1 | **Blowing past the time allotted for upfront research about the client's business.**

We're all guilty of this from time to time. After all, a big reason why we became marketers is our curiosity and drive to learn new things. Which means it's all too easy to become fascinated with a new client's business and lose track of time — "Just one more industry report," "Oh wait a minute here's another competitor we need to consider..."

Takeaway: Treat yourself like a client, scope your research.



2 | Buyer personas are flawed — off-target, inaccurate, generic — or <gasp> even worse — the client doesn't have personas.

Having buyer personas is all the rage today (and with good reason). Sadly, many clients are too embarrassed to admit they don't have them. Or else we accept a client's buyer personas at face value, only to discover later that they're deeply flawed.

Takeaway: Insist on well-crafted buyer personas or conversion rates will suffer. If they don't exist – build time into your SOW to build.

3 | The number of client personnel to touch “inbound” suddenly grows and more training is needed.

How many times have we heard: “It's just my team and me, nobody else will be touching HubSpot or doing any inbound work.” We move ahead, only to discover some time later that:

- The client has hired new interns (“to help us get ramped up”) and / or new contractors / staff (“I don't have time to manage this project”)
- IT is now handling the CRM integration (“it's [a new] company policy”)
- [Insert Department Name] now owns all [insert inbound function] (“my company is centralizing this function”)

Takeaway: You know how many, and which, hands are needed to succeed. Don't settle for less, no matter what the client says.



4 | Turns out “smarketing” doesn’t exist and a good working relationship and processes with Sales have to be built to ensure inbound leads get worked.

We’ve been working with the CMO/VP of Marketing who assured us her VP/Sales has a clearly defined sales process that inbound will easily plug into. But when we go to set up lead scoring, CRM and workflow criteria, we discover that Sales is unprepared to get involved and worst of all, says they’re too busy to be bothered. [Face palm]

Takeaway: Get Sales involved at the start or walk away.

5 | “Make it go viral” or spending time entertaining equally unrealistic client request/expectations.

“Just get [insert celebrity name here] to like/tweet about us and everyone else will do it too.” “We want an animated video, but not a cartoon.”

It’s hard to say “no” for fear of losing the client. And sometimes it’s just as hard to avoid getting caught up in exciting new ideas, which might (or might not) solve whatever crisis (or executive ego-driven desire) has just erupted, the solution for which goes beyond the agreed-upon SOW.

Takeaway: Use data to show what’s working [or not] and why. Don’t be an order taker.

6 | Managing outsourced resources takes more time (and money) than we budgeted.

External talent has their own way of doing things, which may not always map with your processes. Many may not use the same tools, creating compatibility issues. And costs can skyrocket for buying talent on an “as needed” basis.

Takeaway: Audition talent when it’s not urgent and work out the bugs.



7 | Overanalysis.

It's easy to fall in love with inbound marketing analytics, mesmerized by all those charts and graphs. Many of which can distract you, instead of helping you make decisions. Sometimes we can overthink the problem we're trying to solve or the strategy we're recommending. Occasionally we may even doubt the conclusions of our own analyses. And worst of all, when there's less than stellar news for the client, we often keep searching for "good news" we know is buried in the data, if only we can find it. [Eye roll]

Takeaway: Focus on the key stats directly impacting the goals and have a solution ready for any bad news.

8 | Managing multiple tools.

Multiple tools, especially when they duplicate functions, are a total time suck. Many of us can also get seduced into thinking the perfect tool is out there somewhere, hoping to increase efficiencies and reduce cost. Then we realize the drain on resources they've created — learning curves, training classes, mistakes— when we could have used that time, money, and energy more productively.

Takeaway: Just as you test CTAs and landing pages, develop a testing protocol for tools and follow it.

9 | Alignment, or having more internal or client team meetings than anticipated to make sure everyone / everything is aligned.

This can easily get out of control because once we've started implementing the approved plan and SOW, all it takes is one person saying "I don't agree / understand / believe / feel / think / want [blah blah blah]" to start the re-alignment ball rolling back



down hill. Suddenly there's a flurry of emails, meetings and phone calls — and untold hours are forever lost chasing re-alignment.

Takeaway: Hold the line and deal with late objections in the post-mortem — now is the time for action and cooperation.

10 | Over-delivering on purpose, hoping for a longer engagement.

Ever the optimists, we sincerely believe that if we give the client more than they asked for, they'll be so thrilled they'll give us more work. [Buzzer] Wrong.

Takeaway: Clients end up devaluing our expertise and the results.

11 | Client's inbound assets are either MIA or a disaster in the wings.

All the content we were told existed (white papers, research, eBooks, photos, videos, etc.) can't be found. Perhaps the content doesn't belong to the client (no rights for use). Then there's the "in-house" mailing list supposed faithfully scrubbed every six months. Turns out to be a bought list from three years ago and was either never mailed to or had terrible delivery rates. Or horror of horrors! The client's domain name has been blacklisted for CAN-SPAM and "black hat" violations.

Takeaway: Do a complete content audit before committing to a plan and goals.

12 | Client [unexpectedly] adds/changes/deletes products and/or services.

Product and service line managers are constantly balancing their product / service offerings. Especially in response to competitors' moves in the market. (This is especially common for retail/eCommerce B2C sites.) The CMO tells us new products/services are coming and "we need to make a quick and dramatic shift in strategy."

Takeaway: Have an upgrade path [or other options] ready for expanding / modifying any SOW.



13 | Client has a hard time letting go control of content / misses deadlines.

Client takes back creating content (eBooks, social media posts, etc.), yet continually misses the deadlines, which then turns into “hurry up and get it done,” but more importantly wreaks havoc on the results they say they want.

Takeaway: Hold client’s feet to the fire on deadlines and redefine goals. Or walk away.

These scenarios (and more) are played out every day, all over the world. We’ve all experienced them to one degree or another. The important thing is to learn how to recognize them, as soon as possible so you cut scope creep off before it has a chance to spread. Most importantly, don’t be afraid to take a strong stand with a client. Honest. They’ll thank you for it. And if they don’t, you don’t want them as a client anyway.

What Causes Scope Creep?

Far and away, the greatest underlying causes for scope creep are because we:

- Want the deal so bad we can taste it.
- Want the client to like us, so we skip questions that could be misinterpreted in a negative way or tell us we’re not a good fit for each other. [blinders anyone?]
- Want to get going on the work to show the client how great we are.
- Don’t know enough about the industry, business, or market the client is in. To hide our ignorance, we don’t ask questions, we “assume” instead.
- Don’t listen closely enough to the client’s answers when we finally do ask questions.

- Don't take the lead. Clients come to us because they need our expertise. They want us to lead them into the "Promised Land." They don't want to wander in the desert.

- Tolerate being treated as servants, instead of compelling clients to embrace us as partners.

“



Who: Rick Roberge, Trusted Advisor to 21st Century Sales Rock Stars, RainMakers, Founders, Entrepreneurs & Startup Executives

Site: www.rickroberge.com

To be viewed as trusted advisors, we must also be experts in business — not just in marketing. Sit in the CEO's seat. Look at her business through her eyes. Understand what can and does impact her business, for better or worse. Apply our knowledge and understanding of those different aspects to how they impact marketing and vice versa.

Having a holistic, informed view of business and the courage to ask difficult, pointed, intrusive-feeling questions sets successful agency leaders apart from the followers.

We should be asking questions such as:

- How many employees do you plan to have this time next year and in what functions?
- What problems are you experiencing with your manufacturing supply lines? How are you fixing them so they don't ever break again?
- How do you handle defective products?
- Describe your company's culture and its core values. Now, how would your employees/customers/vendors describe them? etc.

That's because without those answers, we can't accurately scope their challenge, and provide the best solutions for them.

Fortunately, it's rare that clients are deliberately deceptive. Most of the time, they don't always see that an issue in manufacturing, customer delivery, or elsewhere could impact an inbound marketing plan. It's our job to draw out of the client the information we need so we can help them achieve their desired results.





What Causes Scope Creep?

“



Who: John McTigue, EVP, Co-Founder

Site: [Kuno Creative](#)

Once you get started with scope creep, it's hard to turn back. Your client will get very comfortable with asking you for more with no additional budget and delivery by EOB today. The best way to avoid scope creep is to address it in the sales process. Your sales conversations should lead to nailing down the precise scope needed to accomplish their goals and how your services will be deployed, and that's exactly what goes into your proposal along with your pricing. You also need to be very precise about what's outside the scope and how to procure those additional services if needed. Before anyone signs on the dotted line, have a very frank discussion with the person who will be signing.

Your client needs to understand and agree to how you will work together, not just what will be delivered. How often will you meet and what are the rules of engagement for unplanned events and other contingencies? Once the deal is done, review the scope and rules of engagement with your client project manager and team so that they understand what has been agreed to and how to work with you as well. Don't ever be afraid to raise the issue of scope in your client meetings. Keep things positive by saying that 'yes, we can do that – I will get a quote over to you by tomorrow afternoon, if that works for you.' If they push back, refer them to the SOW and show them exactly where things are spelled out.



You can't avoid every incident of scope creep. It's inevitable — like weeds growing in a garden. Circumstances will always happen that neither you nor your client can plan for or predict and will need to be addressed.

But you **can minimize the conditions that favor scope creep**. A good gardener (the account manager) applies the right weed killer, lays down appropriate ground cover, waters when and where needed, and yanks out any weeds the moment a tendril appears above ground.



With that in mind, here are the weed killers, ground covers, and tools our HubSpot Partner Agencies have successfully used to keep scope creep from sneaking up on them:

- Listen carefully to client challenges and address them fully in the sales process and the content of the Scope of Work (SOW).
- Provide adequate scope for persona development and content strategy in the SOW.
- Do an in-depth content audit to identify precisely what content assets are available and which assets need to be developed and clarify who will develop which ones.
- Address the entire scope of the website “redesign,” including design, content, search visibility, messaging, usability, responsiveness, information architecture, technical architecture, etc.
- Be more specific in the SOW, reducing any muddy / grey areas that allow for the scope to be expanded without adequate compensation.
- Review the SOW in detail with client before they (and you) sign it and make sure the scope is completely clear and meets their expectations.
- Review the SOW in the kick-off meeting with the client and your team, and subsequent planning sessions. Be sure to get client’s buy-in on the process and specific steps, and your respective roles and responsibilities.
- Co-define measurable, achievable, realistic and timely goals with the client. Get the client’s active agreement, not just a passive one. Implement those goals in HubSpot, set up your monthly reports to review progress to those goals and review them with the client.



- Take charge, lead, and execute a well-defined, mutually agreed upon plan, its strategies and associated tactics.
- Call out updated client needs when those needs go beyond scope during the engagement. Give them an opportunity to: upgrade, re-prioritize their needs / eliminate lower priority items and shelve the needs for a later time.
- Have well-defined processes and clear roles and responsibilities for executing each aspect of the plan so there's no more wasted time figuring out who does what, when, and how.
- Communicate clearly and frequently. Surface issues as soon as they appear. Make good use of client meeting time to keep things moving, on schedule, on budget and meeting client expectations.



Conclusion

Just because we “wrote the ebook” on inbound scope creep does not we’re immune to it. The exact opposite, actually. The research for this ebook took twice as long as we planned. One expert interview led to another, and required extra time for transcription and copy edits. We got jumped in in line for design help. The topic got a lot of internal attention (a good thing) and feedback loops we hoped to keep to a minimum doubled (a bad thing). The moral of the story is that scope creep happens to everyone!

Our hope is that this ebook will not only serve as a map to the areas we’ve found most treacherous, but also a guide to addressing goals and resources in the sale process, to ensure your agency avoids the issue altogether.