

PM FIELD RESOURCE · CHANGE AND ADDITIONAL SERVICES

Is this an additional service request?

● SIDE 1 · MAKING THE CALL

How to think about balancing business management with client experience.

THE BIG IDEA

A request becomes an additional service the moment it moves **scope, schedule, or coordination** past what the agreement includes. Your job is to make the cost visible early, then let the client decide.

01 THE ONE QUESTION

Does the agreement already include this?

If you cannot answer that from the agreement itself, one of two things is true. Either you have not read the contract, or the contract is weak. **Both are fixable today.** Neither gets better by waiting.

02 DO THE HOMEWORK FIRST

- 1 Read the contract.** Is the request more than what it states?
- 2 Estimate the work.** Schedule, coordination, and scope.
- 3 Inform the PIC** of the request and the impact, before you go to the client.

03 TEST EVERY REQUEST AGAINST THREE FACTORS

1

Schedule

Duration, or start and stop. A large change against a fixed end date means more people on the work and a higher burn rate. A change that stays undefined and keeps coming back, such as an alternative option, keeps costing hours every week.

EVALUATE THIS ONE FIRST

2

Coordination

Consultants, meetings, shareholders, quality review. Designers assume coordination is just part of the job. Every report written, every meeting attended, and every drawing reviewed charges to the project.

THE ONE MOST OFTEN MISSED

3

Scope

Increase in area, higher level of design, services not named in the contract. This is the easiest factor to define, because the contract states the scope. Compare the request to what is written.

EASIEST TO DEFINE AND DEFEND

04 THE BEST SET OF DATA

- A clear definition of **how the change falls outside** the scope of work.
- A clear estimate of **the time required**, and whether holding the schedule takes more people.
- A clear breakdown of **how the change affects the work already in progress.**
- A clear set of **steps needed to coordinate** the change into the work.

05 FIELD SIGNALS

DO

- Ask as soon as possible. Waiting makes the ask contentious
- Price the change in time first. Time is money, and clients understand time
- Tell the PIC before you tell the client
- Log every small change from day one

WATCH FOR

- An alternative option that returns every week and never gets defined
- Coordination hours nobody counted
- A fixed end date carrying a growing scope
- Your own discomfort turning into silence

AVOID

- Waiting for a change to feel big enough to mention
- Absorbing the work now and reporting it at closeout
- Answering from memory instead of from the contract
- Asking for money before you present the data

FIRM DECISION PENDING

A firmwide threshold has been proposed and is not yet adopted. The intent: above the threshold, issue an additional service. Below it, **open a scope creep log and notify the client** that once the log reaches the threshold, an additional service will be issued. Until Grace sets the number, log everything and raise it with your PIC.

PM FIELD RESOURCE · HOW TO ASK

Is this an additional service request?

● SIDE 2 · SCENARIOS AND LANGUAGE

It is hard to make someone like you when you are only asking for money. It is easy to keep a relationship when there is full transparency. **Present the data, step back, and let the client decide.**

06 THE FOUR PART CONVERSATION · POLITELY, AND FIRMLY

1	2	3	4
Acknowledge <i>"I would love to help you with that."</i> Say yes to the person before you answer the request. You have refused nothing, and you have promised nothing.	Check <i>"Let me confirm what that takes on our end."</i> This buys you the time to do the homework. Never price a change in the room from memory.	Return With the Number <i>"We can make that change. It adds about 24 hours and pushes the set two weeks."</i> Specific, and unapologetic. Lead with time. Time is the unit a client already understands.	Hand Back the Decision <i>"Would you like to add it?"</i> Yes or no, the answer is fine. Close the same way either time: "Of course. Let me know if you need anything else."
THE SITUATION	SAY IT LIKE THIS	WATCH OUT FOR	
01 In a design meeting, the client asks to see an alternative option.	"Happy to look at that. Let me confirm what the option takes on our end, and I will come back with the time and the fee."	An ask that never gets defined and returns every week. This is the most common source of uncounted hours in design.	
02 The client adds area to the program.	"That takes us from 40,000 to 46,000 square feet. Let me price the added work so you can decide before we build on it."	Treating area as a small change. Area drives every downstream sheet and every consultant.	
03 The client expects a higher level of design than the agreement includes.	"The agreement covers design development. What you are describing is closer to construction documents. Here is what that difference costs in time."	A level of design nobody wrote down. If the contract is vague, fix the contract, not just this one change.	
04 The client asks for an extra report, meeting, or review cycle.	"We can add that review. It adds roughly 16 hours of coordination across three consultants. Would you like to add it?"	Coordination treated as free. It is real time, and it is already charging to the project.	
05 The change is large and the end date will not move.	"We can hold the date. Holding it takes two more people, and here is that cost. The other path is a three week extension at no added fee. Which do you want?"	Quietly staffing up. The burn rate climbs and the margin drops before anyone reports it.	
06 The change is small, below the threshold worth an ask.	"I have logged this one so we both see it. These are adding up. When they reach the threshold, I will bring you an additional service request."	A dozen small changes nobody logged. The first ask then carries all of them, and it surprises the client.	
07 The client pushes back on the price.	"I understand. The number is built from the hours the change takes, and here is the buildup. If it is too high, we can reduce what the change includes."	Defending a number you cannot break down. Without the buildup you cannot hold the price.	

07 HOW TO EVALUATE THE EFFORT

Blended FTE equivalent Estimate the change as a fraction of a full time person across the affected period. Fastest method, and the right one when the change is driven by schedule.	Time per sheet Estimate time per square foot for each sheet the change touches, then add a markup for engineering coordination where it applies.	Hours by discipline Build the change the same way the fee was built. Slowest method, and the strongest one when the client asks to see the buildup.
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FIRM DECISION PENDING

Grace has not named a required method. Until a standard exists, **choose the method that produces a number you can defend line by line**, and tell your PIC which one you used.

THE ONE THING TO REMEMBER

Make the cost visible before the work starts.

Full transparency protects the fee and the relationship at the same time. Silence protects neither.