Clean Scoping

Applying the power of Clean Language for successfully scoping new business

By Caitlin Walker

The best way to explain what Clean Scoping is, is to describe what I am *not* doing.

On my way to an initial Clean Scoping, I am not:

- Wondering if I can fulfil the business need my clients have in their heads
- Thinking about how I can sell to this customer
- Forming thoughts about what I could do for them.

What I am doing is noticing what information I have already about the client and his project, and any assumptions I'm making. And then, I settle myself into a state of *not knowing*. The success of any Clean Scoping is guided by the principle that it should always be an emergent process.

In my experience, the more attached I am to winning the piece of work, the less likely I am to be scoping a really strong, robust, successful project. At the base of it all, I treat each Clean Scoping meeting not as a sales pitch but as an opportunity for the client and I to learn something new, regardless of whether it results in a commission of work.

Equipment

The only things I take with me are an A3 pad of blank paper, some coloured pens and a nice writing pencil. At the start of the meeting, I start by asking questions as 'Cleanly' as I can, such as:

- What would you like to have happen?
- What would you like to know before we begin? About me? Our company? Results etc?
- If this meeting were to be really useful for you, it will be like what?

From that point on, I am using a dynamic mixture of Clean or Clean-ish questions to accept and extend their answers, and Systemic Modelling™ tools to support them to model out their current state, desired state and the resources available to them. These tools are used conversationally.

Here's a partial transcript of a typical Clean Scoping that resulted in losing one piece of business to gain a stronger one.

A prospective client asked me to run a session on 'Overcoming Challenges and Difficulties' for their team at an Away Day. The scoping went like this:

Me: What would you like to have happen?
Client: We've got an Away Day coming up and I'd like you to come and run a session on 'Overcoming Challenges and Difficulties'.
Me: If the Away Day were to be really successful, it'll be like what?
Client: Provocative, inspiring, fun and challenging.
Me: When it's provocative, inspiring, fun and challenging, what happens next, after the Away Day?

Client: My team would be overcoming challenges, tackling difficulties face on.
Me: What would you see and hear that would let you know they were tackling difficulties face on?
Client: They'd be more self-reliant, getting together as a group and working out how to resolve difficulties, not coming to me until they'd tried a few things.
Me: Is there anything else happening on the Away Day?
Client: I'm bringing in a Paralympian to talk about how she's overcome her challenges and difficulties.

During these preliminary exchanges, I am listening for the presuppositions they have already made, in this case:

What would you like to have happen?

> **The success of Clean Scoping is guided by the principle that it should be an emergent process**

- People in the team do not face up to challenges and difficulties enough
- They need motivating and to become more self-reliant
- Hearing how someone else has done this and succeeded will inspire them to do more of it
- The boss is relying on outsiders to help the team become more reliant, rather than relying on them.

I'm noticing the incongruence of bringing in outside expertise to get the group to be self-reliant so I decide to investigate this further.

It is crucially important not to get into contempt with a client about the way they are thinking about their issue. Contempt clouds your ability to pay exquisite attention to what is happening right now and to the possibilities of what else could happen. The more I think about what they should be doing, the less I am paying attention to what they are doing and how I can stay in a modelling frame.

I turn his attention to personal experience of his own self-reliance, and ask the following questions.

Me: Have there been times when you have faced up to difficulties at work, just like you'd like the rest of your team to?
(*It's important when I ask this question that I am open to any answer. He may say, 'No, it's me who is unable to cope.' This would mean I would take the session one way. If he says, 'Yes', I will go a different way.*)

Client: Yes. It's not a work-based one; it's a personal one.

Me: Don't tell me about the event. I'm really interested in what was it that allowed you to face up to that difficulty?
(*It's important for me not to get overwhelmed with detail, and it's the context that I really want to find out about.*)

Client: I knew my family would support me.

Me: What kind of support?

Client: If it all fell apart, I knew they'd pick up the pieces.

Me: Now have a think – has there been a time when you have done this at work? Overcome a challenge or faced up to a difficulty successfully?

Client: Yes. There were a number of them. I was able to do it in that workplace because I had a really strong team.

Me: Don't tell me the content, but tell me the context.
(*I am becoming more overt about what I am doing because right now his attention is on his own experience and memories but soon I'll be feeding back to him what he's said and turning it into a proposal.*)

Client: I knew if it wasn't the right decision my team would still have my back.

Me: Is there anything else about them having your back?

Client: Yes, it about how far I can move out of my comfort zone and take a risk. The stronger the support behind me, the further I can go, knowing I can always return, no matter how it turns out.

Me: And in these two examples, it's the strength of the support behind you that means you are self-reliant, able to face difficulties straight on and able to go further to overcome challenges.
(*I summarise what he's shared and now start moving from modelling his experience to matching what he's discovered about his own self-reliance to how we could apply this process to his wider team.*)
The strength of support is particularly important to you. Each member of your team will have their own criteria for what supports them to be more self-reliant.
(*I'm using his own outcome for developing self-reliance as the guiding principle for shaping the Away Day.*)
We could spend the morning of the Away Day helping them find out what each of them needs to be more self-reliant, look at any themes or patterns across the team and ask what could happen at work to help them be more self-reliant more of the time. Then in the afternoon, they could work out together how to put a couple of those changes into place over the next month and test whether they've been effective.
This way, the Away Day will be an example of what you'd like them to be doing in the future: developing and then relying on their own and one another's ingenuity and resources.
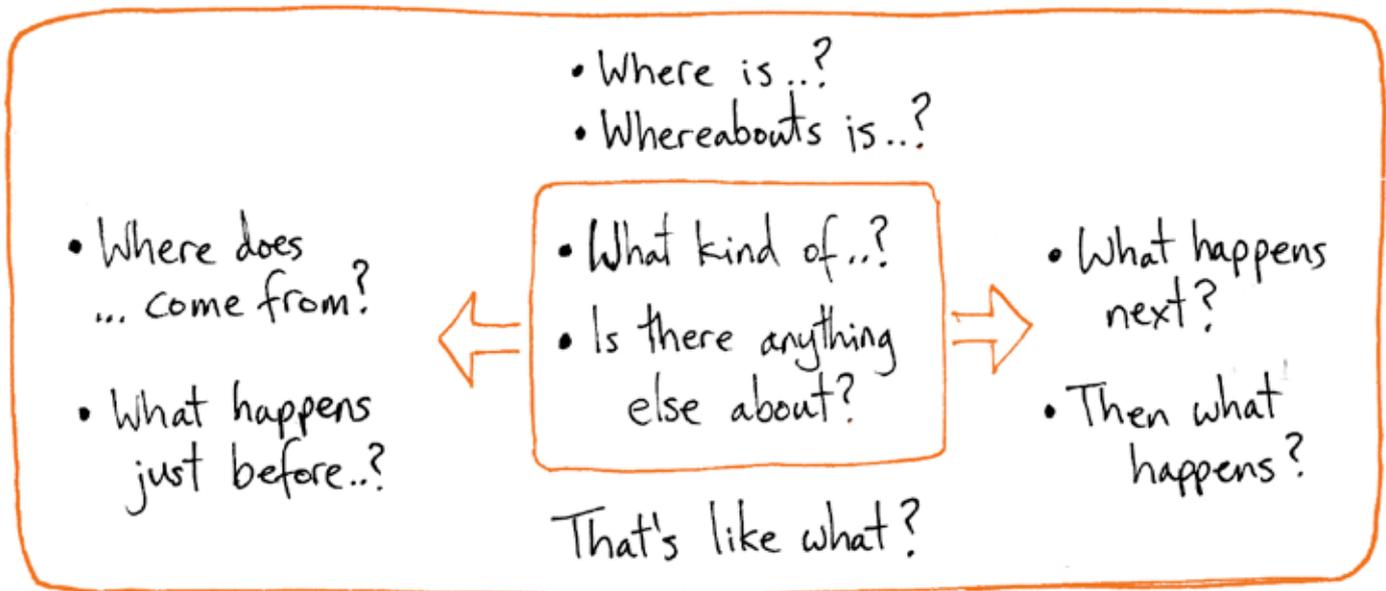
How is Clean Scoping different?

What makes Clean Scoping different from other kinds of client meetings is that you should never have to sell the process. The process sells itself. If I can't make the process tangibly useful to them within the time frame of the meeting, then it's probably not going to suit them or I'm not the right person to be working with them.
The first question I need to answer is whether the person I'm ▶

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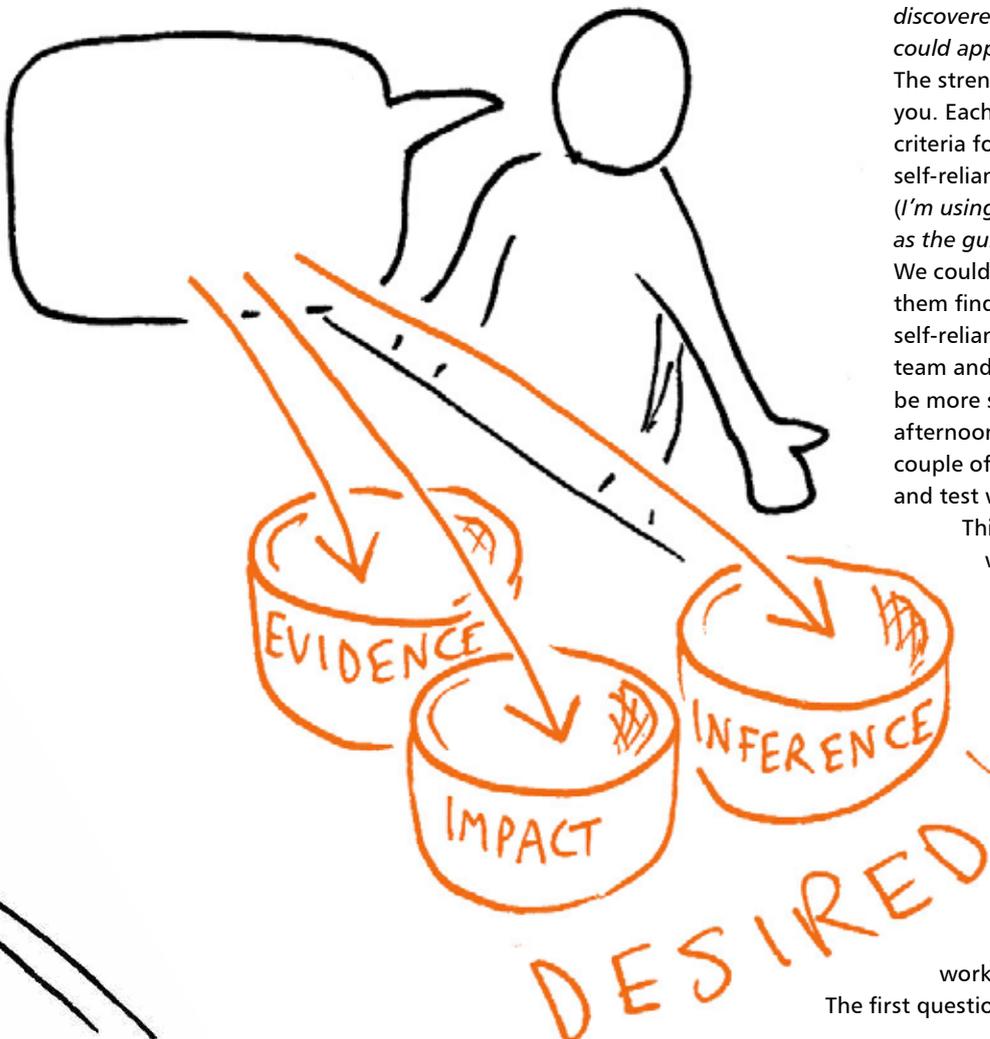
> **During preliminary exchanges, I am listening for the presuppositions they have already made**

- Where is..?
- Whereabouts is..?

- Where does ... come from?
- What happens just before..?

- What kind of..?
- Is there anything else about?

- What happens next?
- Then what happens?

That's like what?

meeting is open to reflection, feedback and updating their ideas in the moment. If they aren't and they don't respond well to this kind of modelling then they probably won't enjoy having me in their team.

The second question that needs answering is whether this person has the influence to make the project a success. For example, if I discover in the meeting that the wider company has a policy of scapegoating or being highly punitive about mistakes, then no amount of self-modelling will induce this team to stop checking with a higher authority before taking risks in a self-reliant way.

If the answer to both these questions is, 'No', then I'll get myself out of the meeting as pleasantly and efficiently as possible.

If the answer to the first question is 'Yes', and to the second question is 'No', then my question would be whether I could get access to the people who do have the sphere of influence required. If no, I would exit the meeting and leave the person with the question, 'What would need to happen to get the right people in the room?'

If the right people who have influence over the project's success can be brought to the meeting table, I would begin the process again and run Clean Scoping with the new group.

A business risk with this process is that I may commit two or three half days with a prospective client, giving them high quality attention without charging them for my time.

For some consultancies, there is a push to make this initial scoping chargeable. Over the 20 years we've run Training Attention, I've found that not charging for it has reaped more rewards in terms of client appreciation of our integrity than we would have earned for the time billed. The position we take is, 'I can't agree to this piece of work unless I'm sure and you're sure we can succeed. I don't want to waste my time or your money'. What this means is that clients have called me months and even years later when they've moved positions or the climate at work has shifted and they know that they have the conditions necessary to move from outcome to action to sustainable change. ●