

bt

THE BULLING TOWNE GROUP, LLC

# Defining the Scope



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# Introduction

THERE IS NO SUCH THING ON EARTH AS AN UNINTERESTING SUBJECT;  
THE ONLY THING THAT CAN EXIST IS AN UNINTERESTED PERSON.  
G.K. CHESTERTON

So, your department or team needs “training”? First, you must identify what and why. This is a sample of the project scoping document we use with clients—to help them identify leadership development needs and next steps.

There are 6 steps to defining the scope. Answer the questions in order, under each of the following categories:

1. **Current Situation**
2. **Ideal Situation**
3. **Measurement**
4. **Commitment**
5. **Budget**
6. **Selecting a Partner**



# Current Situation

1. Describe the current situation.
2. What is your role?
3. Who is there?
4. What are they doing? Saying?
5. Why are they doing that?
6. What's working well/What's effective?
7. What's not working/What's ineffective?
8. What skills are missing?

1. What skills do you wish to add or change?
  
2. What kinds of problems have you been experiencing by not having . . . ?
  
3. What opportunities do you see?
  
4. Who are the stakeholders?
  
5. What is the current training agenda? Tell me how often employees and managers participate in training sessions. Is there an initiative for management/leadership growth? If so, please describe.
  
6. Worst case scenario . . . if you never change this, approach it, or nothing changes, what will happen?



# Ideal Situation

1. Describe the ideal (desired) situation. Why this situation vs. any other? What is desirable about this situation?
2. What is your role? What does it look like?
3. Who is there?
4. What are they doing? Saying?
5. Why are they doing that?
6. What are managers doing differently?
7. What are employees doing differently?
8. Let's say your team effectiveness was where you wanted it to be. What would that allow you to do as an organization that you can't do today?
9. How will the sponsor and executive team feel?
10. How will this initiative help you reach revenue goals?



# Measurement

1. How will we measure success?
2. When does success need to occur?
3. What will your role be?
4. What will the supporting managers do?



# Commitment

1. On a scale of 1-10, where does this issue rate?
2. How committed is the sponsor? The executive team?
3. What are the steps you need to take as an organization to implement new behaviors learned in a workshop?
4. Are you talking to other vendors?
5. What is your time frame to make a decision and when would you like to hold the sessions?



# Budget

1. Have you thought about what level of investment is appropriate for the results we've discussed?
2. Have you established a budget for this project? If so, what is it?
3. Are there affected employees outside of headquarters/this location? If so, how many and where?



# Selecting a Partner

1. Please describe your ideal learning partner.
2. What do you wish your role to be in the development and facilitation of material?
3. What information do you need from us in order to proceed and make a decision?

# About Your Coach

Leila Bulling Towne is an executive coach who specializes in helping leaders decide what to say and how to say it. She coaches executives to speak with authority and authenticity, whether they are communicating to employees, the board, or customers.

Leila hosts her own CBS Interactive video series, “Leila’s House of Corrections.” The videos are streamed thousands of times a day on BNET.com. She is a regular leadership commentator for CBS TV in San Francisco and can be heard on CBS radio stations nationwide.

Her work has been featured in *The Wall Street Journal*, Reuters, *HR* magazine, CareerBuilder.com, *The Rotarian*, and *Women’s Health*, among many others. Her clients range from well-funded Silicon Valley startups to Fortune 500 companies.

Workshops by The Bulling Towne Group include core management skills, behavioral interviewing, transition to leadership, coaching for leaders, and teambuilding with the MBTI®.

In addition to coaching and leadership development, Leila facilitates strategic retreats, speaks at conferences, and hosts webinars for professional associations and clients.

Leila graduated from the University of California at Berkeley with an AB in English and German. She received her MA in English from The Claremont Graduate School at The Claremont Colleges. She has worked with organizations in the US, UK, Germany, France, China, and Australia and currently resides in the San Francisco Bay Area.

You can learn more about Leila and her team at [www.bullingtowne.com](http://www.bullingtowne.com), by calling **415-744-1991**, or by emailing [coach@bullingtowne.com](mailto:coach@bullingtowne.com).

The screenshot shows the website for The Bulling Towne Group, LLC. At the top left is the logo 'bt' and the company name. A navigation menu includes: COMPANY (about leila, partners), EXECUTIVE COACHING (programs, example plan, assessments, consultations), TRAINING (workshops, webinars, hr only), SPEAKING (topics, featured in), RESOURCES (media kit, newsletter, videos, reading list), CONTACT, and BLOG. Below the menu is a map of the San Francisco Bay Area with several pushpins in various colors. Under the map is a section for 'EXECUTIVE COACHING' with a sub-headline: 'We help executives on their way to the C-suite decide what to say and how to say it.' To the right of the map is a featured article titled 'What are the 5 Leadership Themes for this Year?' with a 'submit' button and a note: '\*You'll also get our monthly newsletter with leadership tips from Leila and additional resources to help you and your team lead with ease!'. Below the map are four service sections: 'EXECUTIVE COACHING' (We help executives on their way to the C-suite...), 'LEADERSHIP WORKSHOPS' (We make training tangible and fun...), 'WEBINARS' (Our webinars mean you can train employees...), and 'MEDIA COMMENTARY' (Credible, articulate, and personable commentary...).