

The Conversation-Commitment Framework (CCF) is a simple way to keep projects on track by turning conversations into clear, written commitments. These are the same templates I use with clients. Copy them into your project folder and make them your own.

The 10-Minute Kickoff Script: lock in clear Conditions of Satisfaction from day one

Purpose

Lock in clear Conditions of Satisfaction (CoS) from day one.

Ask these questions:

- **Outcome:** What will make this project a win?
- **Acceptance:** What must be true at handoff for you to accept delivery?
- **Constraints:** What are the hard limits on budget, hours, or timeline?
- **Priorities:** If trade-offs are required, which comes first: quality, budget, schedule, or scope?
- **Interfaces:** Who else is impacted and needs updates?
- **Updates:** How do you want updates and escalations: email, phone, or meetings?
- **Triggers:** What budget variance requires re-authorization?
- **Documentation:** How should commitments and changes be documented?

Why it works

Ten minutes here saves dozens of hours later. It forces clarity, prevents “assumed scope,” and creates a reference point for every decision.

Quick Copy

```
Kickoff Notes - [Project Name]
Outcome: [client's words]
Handoff: [criteria for acceptance]
Constraints: [budget / hours / deadline]
Priority: [quality / budget / schedule / scope]
Interfaces: [names + roles]
Cadence: [email/phone/meeting frequency]
Re-authorization: [trigger point]
Paper trail: [where commitments live]
```

BONUS: The Disaster Prevention Checklist

This is the expanded 10-point checklist promised in the article. Use it to eliminate assumptions and prevent late-stage surprises.

Purpose

Prevent scope assumptions and late-stage surprises. Use this before you start any project or task. Paste it into your kickoff notes and fill in one line per item.

Checklist:

- **Outcome:** What must be true at handoff? Write the client's exact words.
- **Why now:** What problem does this solve, and what happens if we don't?
- **Must-have vs. nice-to-have:** What's required vs. what's optional? Get it in writing.
- **Constraints:** Where is the hard stop? Is it budget, hours, deadline, or compliance? Which one wins if you cannot have all three?
- **Trade-offs:** If we hit a limit, what comes first? Quality, budget, schedule, or scope?
- **Interfaces:** Who else is affected, what do they need, when?
- **Standards:** What does "professional quality" mean to them? (*Templates, examples, formats*)
- **Update Cadence:** Who needs updates, how often, and by what channel? Include phone-call triggers.
- **Change policy:** What forces a re-scope? Who approves?
- **Paper trail:** How will commitments be documented?

Why it works

Ten minutes on this checklist eliminates the assumptions that cause weekend scrambles, blown budgets, and lost clients.

Quick Copy

```
Disaster Prevention Checklist - [Project Name]
Outcome:
Why now:
Must-have vs. nice-to-have:
Constraints:
Trade-offs:
Interfaces:
Standards:
Cadence:
Change policy:
Paper trail:
```

The Budget Variance Trigger: know the moment you must call your client

Purpose

Know the exact moment you must call your client.

Thresholds:

- **GREEN (0–70% budget used):** Weekly email update
- **YELLOW (70–85% used OR schedule drift >2 days):** Phone call within 48 hours + follow-up email
- **RED (>85% used OR drift >3 days OR new work requested):** Phone call within 24 hours + written approval before continuing

Script example (YELLOW):

“We’re at [X]% of budget with [Y] deliverables remaining. Here are three options to stay aligned with your priorities...”

Why it works

You catch problems while clients still have choices. You never blow the budget without approval. The channel matches the stakes: email for updates, phone for decisions, written sign-off when money is on the line.

Quick Copy

Budget Variance Trigger - [Project Name]

GREEN (0–70% budget used) → Weekly email update

YELLOW (70–85% used OR schedule drift >2 days) → Call within 48 hrs + follow-up email

RED (>85% used OR drift >3 days OR new work requested) → Call within 24 hrs + written approval before continuing

The 'Oh Shit' Email Template: turn bad news into clear choices

Purpose

Use this when a project is going off track. It turns bad news into clear client choices.

Why it works

Clients stay in control. You avoid surprises. And you never eat hours that weren’t authorized.

Template

Subject: Project Variance Alert: [Work Package Name]

Current Status: 78% of budget used (31/40 hrs) with 3 deliverables left

Root Cause Analysis: Scope complexity exceeded original estimates due to [specific reason]

Options for the client:

- **Stay on budget:** Deliver essentials only, defer extras
- **Keep scope:** Approve +12 hrs, +30% budget, same timeline (*requires written approval*)
- **Phase delivery:** Deliver core now, extras in Phase 2, budget on target

Decision needed by: [Date] to stay on schedule

Who approves: [Manager level]

Next step: I will call within 24 hrs to confirm your choice

Documentation: This email is the official notice. Written approval is required before going past 40 hrs.

Why it works

Clients stay in control. You avoid surprises. And you never eat hours that weren't authorized.

Quick Copy

Subject: Project Variance Alert: [Work Package Name]

Current Status: [xx]% of budget used ([xx]/[xx] hrs) with [#] deliverables left

Root Cause Analysis: [reason]

Options:

- Stay on budget: Deliver essentials only, defer extras
- Keep scope: Approve +[xx] hrs, +[xx]% budget, same timeline (*requires written approval*)
- Phase delivery: Deliver core now, extras in Phase 2, budget on target

Decision needed by: [date]

Who approves: [role]

Next step: I will call within 24 hrs to confirm your choice

Documentation: Written approval required before exceeding [xx] hrs

The Weekly Update Generator: copy, customize, and send in under five minutes

Purpose

Give clients a five-minute update that proves control and avoids surprises.

Template

Subject: Project X: Weekly Update (Scope: G | Budget: Y | Schedule: G)

Status:

- **Scope:** Green. All deliverables on track to CoS
- **Budget:** Yellow. 28/40 hrs used (70%), projected final 38 hrs
- **Schedule:** Green. Delivery confirmed 10/28 with 2-day buffer

Proof of Progress:

- Completed: v0.3 HMI screens (6 hrs), I/O validation, P&ID approval (2-day delay, mitigated)
- All commitments verified in writing: [Y/N]
- Burn rate: 14 hrs/week vs. 13 planned (ahead of plan)

Risks to Watch:

- Critical path: Tag names from vendor (Owner: Client Eng, due 10/21, escalate 10/20 if no response)
- Next trigger: 32 hrs (80% budget used)

Client Decision Points:

- Alarm package: Option A (no cost, basic alarms) vs. Option B (+8 hrs, comprehensive)
- Decision owner: Ops Manager. Due 10/22. Delay adds 2 days.

Next Week Commitments:

- Deliverables: Screen testing completion, training materials finalization
- Checkpoints: Client review 10/25, sign-off needed for commissioning

Why it works

Clients see you're in control. Small problems surface early, not when it's too late to act.

Quick Copy:

Subject: [Project Name]: Weekly Update (Scope: [G/Y/R] | Budget: [G/Y/R] | Schedule: [G/Y/R])

Scope: [status]

Budget: [status with hours used/authorized]

Schedule: [status with target date/buffer]

Proof of Progress:

- [deliverables completed]
- Commitments verified in writing: [Y/N]
- Burn rate: [xx hrs/week vs. xx planned]

Risks to Watch:

- [risk + owner + due date]
- Next trigger: [xx hrs or % budget]

Client Decision Points:

- [option A vs. option B]
- Owner: [role], due [date]

Next Week Commitments:

- [deliverables/tasks]
- [review/sign-off date]

The Project Closeout Checklist: Finish Strong and Capture Lessons That Stick

Purpose

Finish strong, lock in lessons, and set up future work.

Phase 1: Client Completion

Subject: [Project Name]: Declaration of Completion
We are declaring completion of [Project Name] against the original Conditions of Satisfaction.

Original CoS:

1. [First CoS bullet from kickoff]
2. [Second CoS bullet]
3. [Third CoS bullet]

Delivered:

- ✓ [Deliverable against CoS #1]
- ✓ [Deliverable against CoS #2]
- ✓ [Deliverable against CoS #3]

Final Metrics:

- Budget: [X hours used vs. Y authorized]
[Difference: [+/- Z hrs]
- Schedule: [Delivered on/before target date]
- Scope: [All must-haves delivered | Deferred items: list]

Action: Please confirm acceptance or identify any gaps.

Silence is not acceptance. Always get written confirmation before closing.

Phase 2: Internal Lessons

What went right:

- [communication wins]
- [decision points that helped]
- [monitoring that caught problems early]

What went wrong:

- [assumptions vs. confirmations]
- [missed escalations]
- [gaps in documentation]

Scorecard (1-5):

- Clear CoS kickoff goals
- Commitments in writing
- Updates on schedule
- Problems caught early
- Budget sign-off

Next project changes:

- [process change #1]
- [process change #2]

Capture lessons now. If the same problem shows up three times, it's a process problem, not an execution problem. Fix the process.

Phase 3: Relationship Maintenance

Subject: [Project Name]: Thank You + Future Planning

[Client Name],

Thanks for confirming acceptance of [Project Name]. Working with you on [specific challenge] reinforced why I enjoy these projects.

You mentioned future interest in [future work]. I've already documented the integration points that will make Phase 2 straightforward.

I'll check in around [timeframe client mentioned] to see if timing aligns.

[Your name]

Why it works

This structure proves you delivered, locks in improvements for the next project, and keeps you top-of-mind for future work.

Quick Copy

[Project Name]: Declaration of Completion

Original CoS:

1. [...]
2. [...]
3. [...]

Delivered:

- ✓ [...]
- ✓ [...]
- ✓ [...]

Final Metrics:

- Budget: [X vs. Y | +/- Z]
- Schedule: [Delivered on date]
- Scope: [Delivered vs. deferred]

Action: Please confirm acceptance. Silence is not acceptance.

Internal Lessons

What went right: [...]

What went wrong: [...]

Scorecard (1-5):

- Kickoff goals clear
- Commitments in writing
- Updates on time
- Problems caught early
- Budget sign-off

Next project changes: [...]

Relationship Maintenance

Subject: [Project Name]: Thank You + Future Planning

Body: Thanks for confirming. You mentioned [future work]. I'll check in [timeframe].

Toolkit Implementation Priority

If you can only do ONE thing:

Use the 10-Minute Kickoff Script. Nothing else works without clear CoS.

If you can do TWO things:

Add the Budget Variance Trigger. This catches problems while you can still fix them.

If you can do THREE things:

Add the Weekly Update Generator. Consistent updates prevent most client disasters.

Full implementation:

All five tools together create the closed-loop control system from the article. Start with kickoff, add monitoring, then refine updates and closeout.

The time cost:

About 1 hour per project. Ten minutes at kickoff, five minutes per weekly update, fifteen minutes at closeout. That hour prevents disasters that waste dozens of hours and can kill client relationships.

Next steps

Need help applying CCF to your projects?
Book a free 30-minute Strategy Session.

Website: <https://chrisstasiuk.com/>

[Schedule a call](#)

Email: coaching@chrisstasiuk.com

Roll CCF out to your team

Workshop options for engineering teams. Practical, hands-on, built around your projects.

Workshops: <https://chrisstasiuk.com/services/team-workshops-and-training/>

[Schedule a call](#)

Email: coaching@chrisstasiuk.com