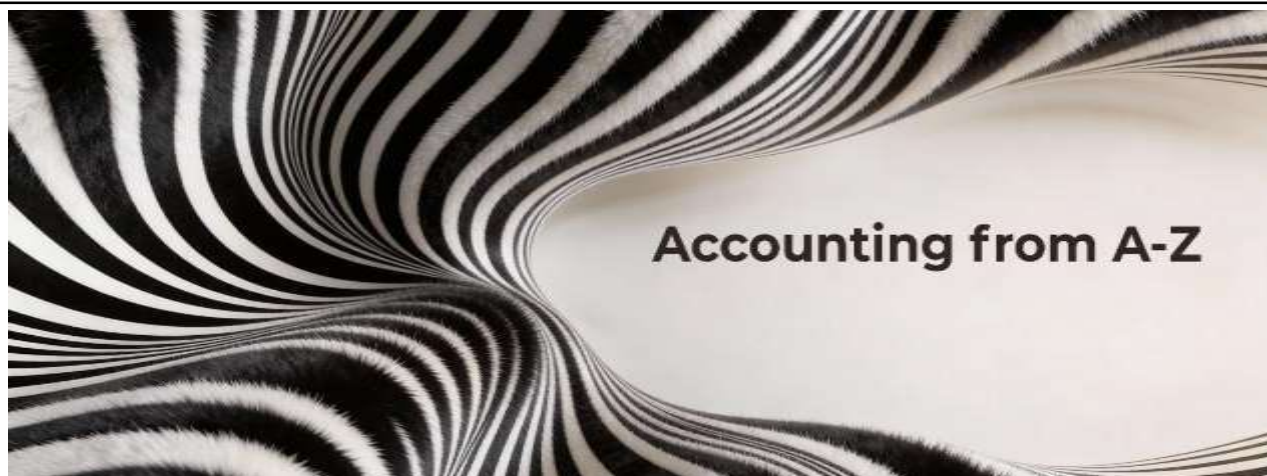




## SCOPE CREEP & BILLING LEAKAGE CHECKLIST - 2026 Edition

### IT FEELS SO GOOD TO ENSURE PROJECT PROFIT!

Consulting & Project Management Firms: Identify scope creep, missed billables, and process gaps that reduce revenue. Provided by Allegra Accounting (Pty) Ltd ([www.allegra-accounting.co.za](http://www.allegra-accounting.co.za))



Time to complete: ~5 minutes | Output: a clear top-3 action list

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#### Did you know?

Most Consulting and Project Management firms lose between 15% and 30% of their potential revenue—not because they lack expertise, but because the "value gap" between the work performed and work actually invoiced is never closed.

Allegra Accounting consistently sees the same high-risk failure patterns:

- **The "Quick Favour" Drift:** Delivering additional workshops, reports, or "minor" changes for free, which cumulatively erode project margins and consume unbilled senior resources.
- **Invisible Hours:** Failing to capture and bill for the "hidden" time spent on project coordination, stakeholder management, and out-of-scope communication.
- **The Handshake Trap:** Proceeding with significant project changes based on verbal agreements without formalising the commercial impact, leading to disputed invoices and write-offs.

This checklist helps you pinpoint where free work leaks occur, where your processes are vulnerable, and how to protect your revenue effectively.

#### Quick Start (3 steps)

1. Work through the checklist once, honestly, without overthinking it.
2. Mark gaps that are high-risk or recurring.
3. Prioritise your top 3 fixes for the next 14 days and assign an owner + due date.

Tick each true statement ☐. Use the score boxes to interpret your overall risk.

If you want a second opinion, request a **free 15-minute review** to help you feel confident in your priorities and plans.

Book your free Scope and Billing Leak Check Call: — [CLICK HERE.](#)

## 1. SCOPE DEFINITION & DOCUMENTATION

| Checklist                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Notes / Owner / Due |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Every project has a written and signed Scope of Work</li><li><input type="checkbox"/> Deliverables are clearly defined (what is in scope)</li><li><input type="checkbox"/> Exclusions are spelt out (what is NOT in scope)</li><li><input type="checkbox"/> Assumptions and client responsibilities are documented</li><li><input type="checkbox"/> There is a straightforward process to raise change requests</li></ul> |                     |

**Section Status: CONTROLLED / NOT CONTROLLED**

## 2. CHANGE CONTROL & APPROVAL

| Checklist                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Notes / Owner / Due |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Changes in scope are captured in writing (email or formal change order)</li><li><input type="checkbox"/> Impact on timelines is discussed and documented</li><li><input type="checkbox"/> Impact on fees is calculated and agreed upon before extra work is done</li><li><input type="checkbox"/> No significant scope changes are implemented without written approval</li><li><input type="checkbox"/> There is a log of all change requests per project</li></ul> |                     |

**Section Status: CONTROLLED / NOT CONTROLLED**

## 3. TIME TRACKING & BILLABLE HOURS

| Checklist                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Notes / Owner / Due |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <ul style="list-style-type: none"><li><input type="checkbox"/> All consultants track their time (billable vs non-billable)</li><li><input type="checkbox"/> Time entries are linked to specific projects and tasks</li><li><input type="checkbox"/> There is a review of time entries before invoicing</li><li><input type="checkbox"/> Write-offs (unbilled time) are tracked and analysed</li><li><input type="checkbox"/> No repeated patterns of large unbilled hours on key projects</li></ul> |                     |

**Section Status: CONTROLLED / NOT CONTROLLED**

## 4. INVOICING & MILESTONE BILLING

| Checklist                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Notes / Owner / Due |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Invoices are sent on time at milestones or month-end</li><li><input type="checkbox"/> All agreed deliverables and hours are billed</li><li><input type="checkbox"/> Retainers are invoiced each month consistently</li><li><input type="checkbox"/> Payment terms are clear and enforced</li><li><input type="checkbox"/> No habitual delays in sending invoices after work is complete</li></ul> |                     |

**Section Status: CONTROLLED / NOT CONTROLLED**

## 5. PRICING DISCIPLINE & DISCOUNTS

| Checklist                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Notes / Owner / Due |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Standard rate cards exist for different roles/levels</li><li><input type="checkbox"/> A senior decision-maker approves discounts</li><li><input type="checkbox"/> Exceptions to pricing are documented (strategic deals only)</li><li><input type="checkbox"/> No informal, on-the-fly discounts to “keep the client happy”</li><li><input type="checkbox"/> You regularly review which clients/projects are underpriced</li></ul> |                     |

**Section Status: CONTROLLED / NOT CONTROLLED**

### YOUR SCOPE & BILLING LEAKAGE SNAPSHOT

**Count how many sections are marked CONTROLLED:**

✓ 5/5 Controlled = Strong control. Leakage is limited but still requires periodic review.

⚠ 3–4 Controlled = Moderate risk. Some projects are likely leaking revenue.

+ 0–2 Controlled = High risk. You are almost certainly giving away free work.

**Did you find any of these leakage risks?**

- ⚠ Additional workshops, reports, or meetings delivered for free
- ⚠ “Quick changes” that turn into a complete rework without extra billing
- ⚠ Hours written off because the scope was never clarified
- ⚠ Delayed invoicing and missed milestones
- ⚠ Strategic discounts that never end or expand beyond intention

### RECOMMENDED NEXT STEP

**List your Top 3 Actions:**

If fewer than five sections are CONTROLLED, book a free Scope & Billing review. We’ll support your efforts to improve your scoping, pricing, and billing, helping you identify where you’re overservicing or underbilling and suggesting practical scope-control practices.

**Book your free Discovery Call - — [CLICK HERE.](#)**



- Web: [www.allegra-accounting.co.za](http://www.allegra-accounting.co.za)
- Email: [hello@allegra-accounting.co.za](mailto:hello@allegra-accounting.co.za)
- WhatsApp
- LinkedIn
- Facebook

**Allegra Accounting & Tax Services Pty (Ltd)**

Please note: Free consultations are available only when the client provides sufficient, up-to-date information. If this information is unavailable, Allegra may first need to bring the company up to date to enable an adequate review.