VOLUME 02 / LANDSCAPE BUSINESS

A clear scope. A controlled change.

Turn a site visit into a proposal, separate allowances from inclusions, and carry approved changes to the crew.

01 / SCOPE REVISION 0

What is included?

02 / CHANGE 01

What changed - and who reviewed it?

03 / SCOPE REVISION 1

What does the crew build now?

WORKED EXAMPLES / CHECKLISTS / REUSABLE WORKSHEETS

Original practical business guidance. Examples are fictional. Adapt the records to your actual scope, costs and professional review.

02 / BRIEF

Let the site visit earn the proposal.

Write down the purpose of the space before choosing the deliverable.

Hear the objective

Ask what the customer wants to use, retain, remove and maintain. Identify the decision-maker and who should attend the visit. A preferred completion date is a constraint to review, not an automatic promise.

Separate observations from conclusions

Record dimensions, access and visible conditions. An observed wet area is not yet a drainage design. Assign unresolved site, utility, approval or specialist questions to someone qualified to review them.

Send a useful recap

A good recap names the requested result, what was observed, what remains open and when the customer can expect the next update. The project brief tool helps organize that record without sending it automatically.

Leave the visit with an owner

Write the unresolved question, the person responsible and the next update you will give the customer.

Your project note / reference

Responsible person / next action

03 / SCOPE

Describe work in checkable phases.

A clear scope links customer expectations to production tasks.

Name the phases

Identify removal, preparation, materials, installation, protection, cleanup and handoff. Include drawings or specifications by current revision. Name the geographic area where each phase applies.

State what completion means

Avoid promising an unlimited outcome such as "perfect landscaping." State the agreed installed work, cleanup expectation and handoff records. Separate unfinished included work from a new customer request.

Use a reviewed selection record

Plant and product names alone may not identify the actual size, quantity or specification. Keep the approved selection schedule and substitution process with the scope. Technical suitability belongs with the appropriate review.

Phase	Willow Court base scope
Area / selection	216 ft² bed / 18 reviewed plants
Included	Defined removal, preparation, installation and cleanup
Retained	Existing tree outside work area

04 / BOUNDARIES

Make the boundaries visible.

Inclusions, exclusions and dependencies belong in plain sight.

An exclusion is specific

Name work outside the offer: for example, tree work, grading changes, drainage design or irrigation alterations. Match exclusions to the actual business and project rather than copying a blanket list that contradicts the quoted work.

A dependency has an owner

Identify who resolves a selection, specialist question, access arrangement or approval. Record what waits until that decision. Do not hide a dependency in a vague "subject to site conditions" sentence.

A date has a status

Separate a requested date, a planning target, an estimate visit and a confirmed installation commitment. Material availability, site readiness, weather and crew capacity can affect the work. Communicate the next reassessment if timing remains open.

Resolve the dependency

Identify one specialist or customer decision that must happen before the affected work can proceed.

Your project note / reference

Responsible person / next action

05 / ALLOWANCES

Do not make an allowance look fixed.

Show what is known and what still depends on a decision.

Define the allowance basis

Identify the selection or quantity it covers, the entered amount and how a final choice changes the price. A fixed inclusion, an optional upgrade and a provisional allowance are different commitments.

Separate alternatives

Give each option a defined scope and price effect. Avoid comparing prices built on different quantities without explaining the difference. A lower price may simply exclude preparation or disposal that the customer still expects.

Make the next action easy

Ask the customer to review the named selections, exclusions, price status and pending decisions. This working scope is not a legally reviewed contract or a signature service. Use your actual business terms and approval process.

Separate the choices

Identify the fixed inclusion, optional work and allowance so the customer can distinguish them.

Your project note / reference

Responsible person / next action

06 / CHANGE

Record the request before changing the work.

A request is the start of a review, not the end of approval.

Capture the change

Record who requested it, the original scope reference, what is added or removed and the reason. Review effects on labor, materials, access, technical questions and procurement.

Review price and timing together

For the fictional extra four plants, added labor costs $128 and materials $52: $180 total entered cost. At a 25% target margin, the price increase is $240. The revised price is $2,309.34 before any applicable tax.

Keep the pending state clear

Explain which affected work waits and what can proceed under the current scope. Record the decision through the actual agreed process. The sample change worksheet records your wording; it does not authorize work or capture a legal signature.

Change 01	Fictional result
Plant quantity	18 to 22
Incremental cost / price	$180 / $240
Revised project price	$2,309.34

07 / CREW

Give the crew the current version.

An accepted change is incomplete until the working instruction changes.

Publish one current reference

Issue the revised scope and selection schedule. Mark the old version superseded. Tell the crew which quantities changed and which did not; in Willow Court, plant count changes but the bed area and mulch-volume assumptions do not.

Confirm receipt and questions

Name the crew lead who receives the change. Resolve contradictory texts, sketches and verbal instructions before the affected work starts. Keep the customer update and crew instruction consistent.

Carry the record into closeout

Use the current approved scope when reviewing completed work. A closeout based on revision 0 would miss the additional plants. Keep open items and new requests separate so neither disappears into a general "finished" status.

Check the handoff

Record the current scope revision and who confirmed receipt of the revised selection record.

Your project note / reference

Responsible person / next action

08 / WORKSHEET

Review the proposal and change together.

Complete this working checklist with actual project details.

Project / current scope and drawing reference

Included phases / named areas / verified selections

Exclusions / allowances / decisions still needed

Customer next action / price and timing status

Requested change / price effect / timing effect

Actual approval record / revised crew instruction

Use the FREE tools and the completed Willow Court project: bookedworkpro.com/resources/landscaping

Fictional amounts are USD; tax is omitted for the worked arithmetic only. This is a business planning resource, not an installation specification, legal contract or guaranteed profit model.