

COMMERCIAL — EXECUTIVE BRIEFING

Retainer Scope Briefing

What is in, what is out, and what triggers a change

DOCUMENT	PREPARED	OWNER	PAGES	STATUS
RSB-27-066	December 2027	Account Management	6	Illustrative sample

The read

The retainer is priced at 40 hours a month and running at 61. The overage is not one large request; it is a steady accumulation of small ones, none of which anyone would refuse individually and none of which were in scope.

40 Hours contracted, monthly	61 Hours delivered, average	0 Requests declined in the period	14 Median request size, hours
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IN SCOPE, AND DELIVERED

- 01 Monthly content set.
- 02 Two campaign concepts per quarter.
- 03 Quarterly review.

OUT OF SCOPE, ALSO DELIVERED

- 01 Ad-hoc social assets, weekly.
- 02 Presentation support.
- 03 Retail artwork amends.
- 04 Photography retouching.



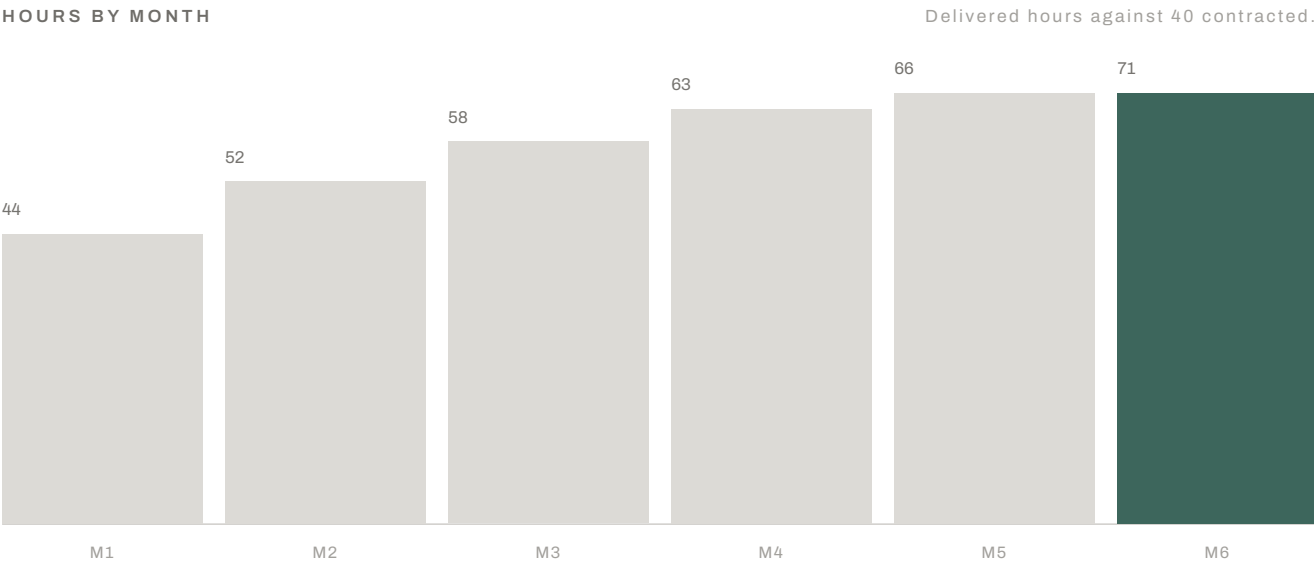
What the client asked for.

THE BRIEF · MCLEUKER HOUSE SET

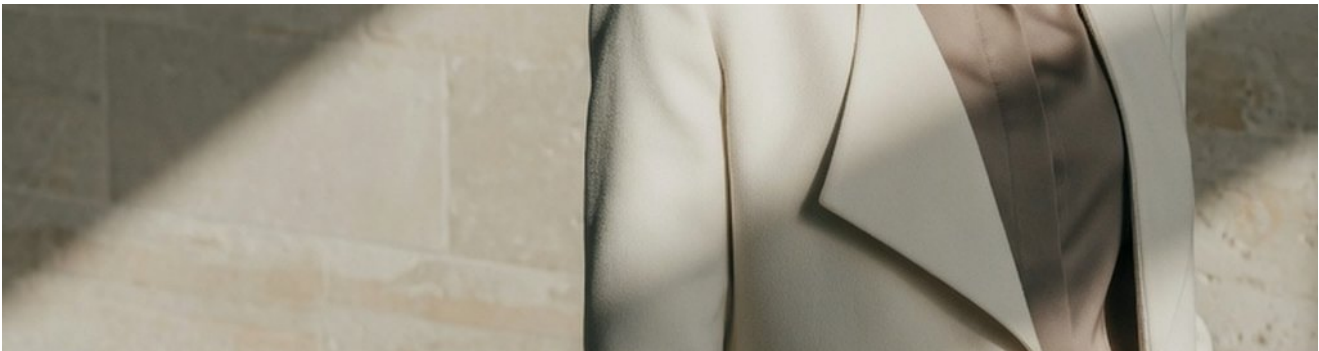
SO WHAT

No single request is unreasonable and the total is a third of a full-time person. Scope is not protected by refusing requests; it is protected by counting them.

Where the hours go



The trend matters more than the average. Overage that grows monthly is a scope that is being redefined by use rather than by agreement.



What was actually made.

THE WORK · MCLEUKER HOUSE SET

SO WHAT The overage grows every month. That is a scope being redefined by use, and by month twelve it will be double the contract if nothing changes.



The pitch is the product until the account is won, and nobody bills for it.

MCLEUKER HOUSE SET

The reset

THREE POSITIONS

OPTION	EFFECT ON RELATIONSHIP	EFFECT ON MARGIN	SUSTAINABLE
Absorb it	NONE	NEGATIVE	NO
Reprice to actual	A CONVERSATION	RESTORED	YES
Hold scope, log overage	A CONVERSATION	PARTLY	YES

HOW TO RAISE IT

Not	We are doing too much
Instead	Here is what we delivered, against what was scoped
Evidence	The log, by request, with hours
Ask	Reprice, or agree what comes out
Not assumed	That the client knows — most of these were asked casually

SO WHAT Most of these were asked casually and granted casually. Showing the log is a different conversation from asking for more money, and it is the one that works.

Decisions

DECISIONS ARISING FROM THIS BRIEFING

DECISION	OWNER	BY	IF IT IS NOT TAKEN
Log every request against scope, with hours	Account Director	Weekly	The overage stays invisible to both sides
Raise the reset with evidence, not with a complaint	Account Director	15 Dec	It reads as a fee request
Reprice or agree removals before renewal	Managing Director	31 Dec	The next term is priced at 40 for 71
Set a monthly hours report as standard on all retainers	Studio Director	31 Jan	Every retainer repeats this

SOURCES AND BASIS

Delivered hours — our own time tracking over the period stated.
Contracted scope — the signed retainer agreement.
Request log — reconstructed from project records; recorded as reconstructed.

ILLUSTRATIVE SAMPLE

This document is a rendered SAMPLE of the Retainer Scope Briefing template, produced to show its structure, exhibit inventory and register. The figures in it are illustrative and are not market intelligence. A real run of this template researches and cites its figures with an as-of year for each, or marks them as modelled and states the basis — the rule the template itself carries.