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PRACTICAL WORKBOOK 02

# When the client holds the constraints

## “The client won’t change it.” Have you asked the person who can?

Name one client-held constraint. Who can reconsider it, and what would they need to decide?

Until you can answer, be careful about telling people that a choice is closed. An inherited answer needs checking before it becomes your public explanation.

### For the person who owns the decision

Your team needs a clear boundary, a route back to you and an answer in time to use it. Otherwise, they may promise too much or close down a choice you would have reconsidered.

### What a useful escalation gives you

The impact on people, an option worth testing and the trade-off you need to decide. “The community won’t like it” gives you none of these.

### Start with one constraint

Workbook 01 asks what people can influence. This workbook helps when the authority to change that answer sits with the client.

### The constraint we need to take back

Write the actual instruction or assumption, rather than “client requirements”.

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# Find the basis. Find the authority.

Keep three things separate. Each calls for a different conversation.

## A verified requirement

Find the exact approval condition, contract clause or technical limit. Record who checked it and who can advise on any permitted change.

## A client instruction

Record who gave it, what it covers and who has authority to vary it. Treat a request for review as a question awaiting an answer, rather than permission to depart from the instruction.

## An assumed preference

Trace “that’s how the client wants it” to a named person or record. Until it is checked, mark the boundary as unconfirmed.

## What is the constraint based on?

Record the requirement, instruction or assumption and its reference.

## Who holds the authority?

Who can decide? Who must advise or approve? Who will take the question to them?

**A client’s agreement may still need another approval. Keep current requirements in place until the authorised change is confirmed.**

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# Take a decision back to the client

Use this as one short escalation brief. Agree the route with your delivery lead and give the client decision-maker something specific to answer.

## The current position

What are we instructed to do? What record supports it?

## The consequence for people

Who carries the impact, and for how long? Whose rights or cultural authority need direct engagement? Record evidence and uncertainty.

## The alternative and its trade-off

What could reduce the impact? What needs testing for safety, access, cost, programme and approvals?

## The decision we need

Ask for a specific change or permission to test an option. State your recommendation and what happens if the current approach stays.

## The owner and the deadline

Decision-maker: _____ Needed by: _____ Update to people by: _____

If an answer misses the deadline, agree the next escalation and tell people when they will hear again. Silence leaves the current boundary in place; it does not authorise a change.

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# What a useful escalation looks like

## Fictional example: access during frontage works

### The inherited answer

The team is told to close a shopping-strip frontage in one continuous stage. “The client wants the shortest programme” becomes the explanation to traders.

### The check

The engagement lead checks with the delivery manager. Continuous closure is the client’s preferred sequence, not an approval requirement. The client project director can reconsider it, subject to technical and access checks.

### The request

Traders explain how the closure would interrupt deliveries and access. The team asks the client to fund a check of staged works, setting out the possible extra time and traffic-management cost.

### The decision

The client funds the review. Checks confirm staged works are feasible, and the client authorises the additional cost and revised programme. Some short closures remain. The team explains those limits, agrees delivery windows and assigns the resulting commitments.

**The record connects the original instruction, people’s experience, the option tested and the authorised change. A concern reached someone able to act on it.**

### Our equivalent

What evidence or workable alternative would make our own escalation worth deciding?

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# Give people an honest answer

Match the invitation to the authority you actually have. Make clear what can change and when people will hear back.

## When a change is authorised

Explain the revised scope and invite input on choices still open. Name the decision-maker, the input deadline and the feedback date.

## While the answer is pending

“We have asked the client to reconsider ____. We cannot promise a change. You can help us understand ____. We will update you by ____, even if the decision is still pending.”

## When the boundary stays

Explain who decided, what they considered and why the limit remains. Identify any genuine influence over delivery or impacts. Keep disagreement and unresolved concerns visible.

## Our next message

What is confirmed, what is pending, what can people influence and when will we update them?

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## Which constraint are we asking people to accept that we have not properly tested with the client?

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**Next: Workbook 03 · Closing the loop when the answer is no.**

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