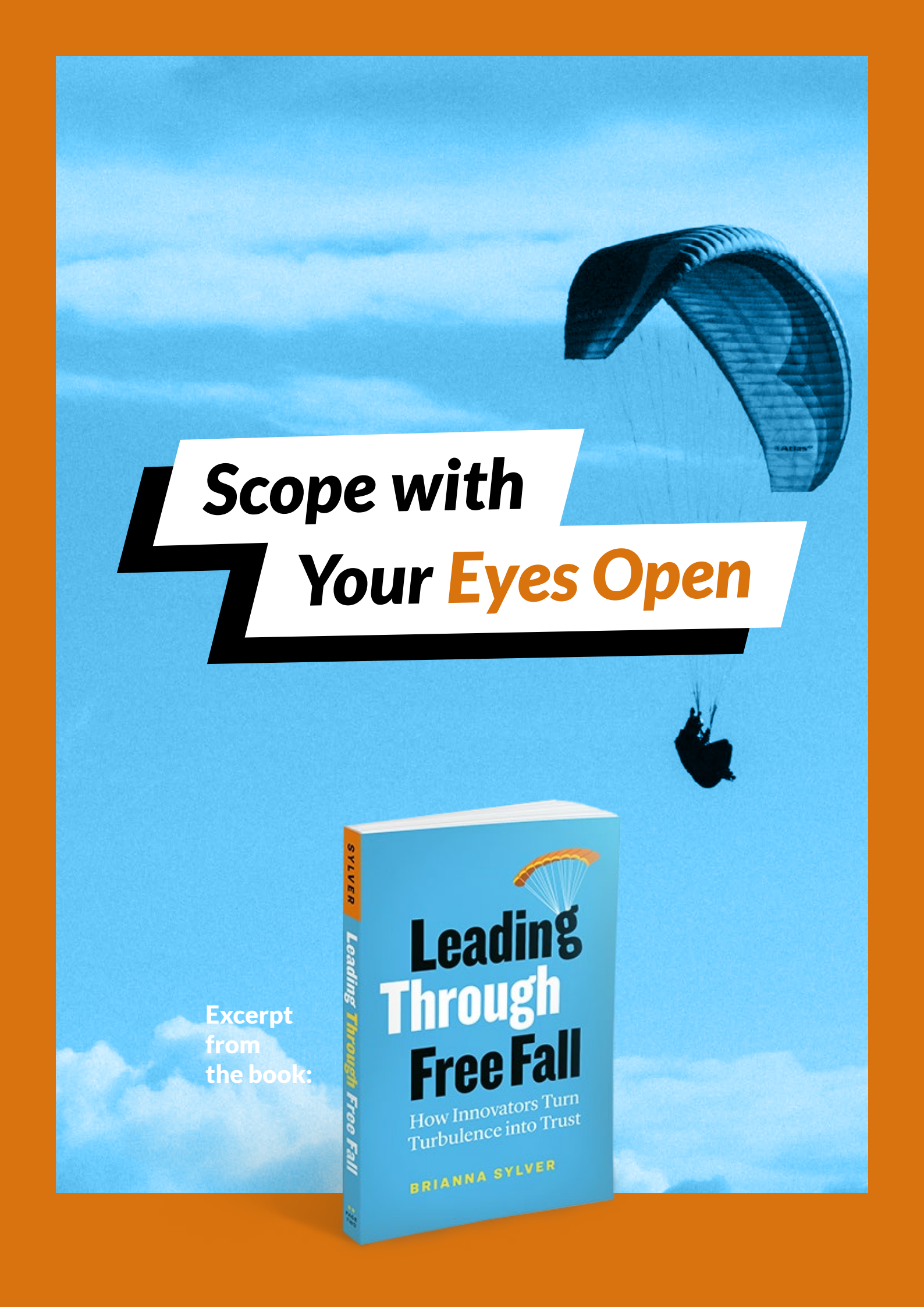
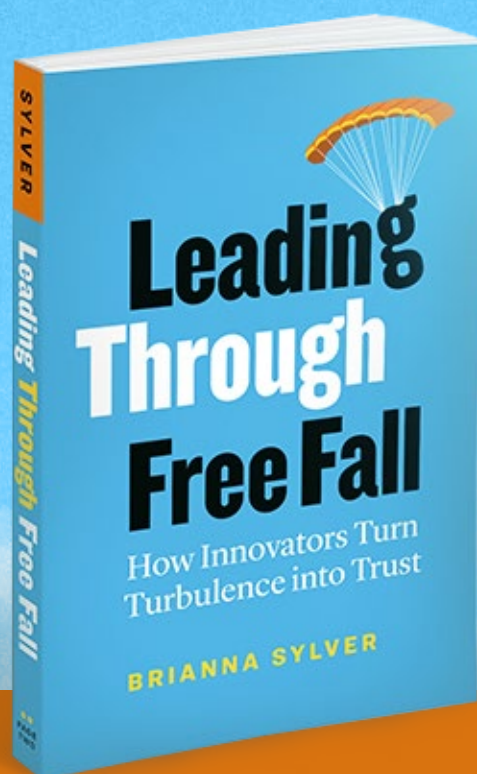




Scope with Your **Eyes Open**

Excerpt
from
the book:



Before You Begin: Why This Chapter Matters

Every research or innovation project starts with a scoping conversation, but too often, those meetings are treated as box-checking exercises. Stakeholders arrive with confidence, assumptions, and predefined solutions, and insights professionals are pressured to simply execute.

The result?

Blind spots go unchallenged, and teams end up asking midway through a project, “*Why are we even doing this?*”

Chapter 1: Scope with Your Eyes Open equips you to avoid that trap.

By adopting the **Inquiry-Based Project Scoping Script**, you’ll learn to challenge assumptions, uncover hidden needs, and align projects to the broader business goals they are meant to serve. This shift moves you from order-taker to trusted partner, setting the foundation for insights that truly drive action.

This chapter is one of **17 tools** featured in Brianna Sylver’s playbook, *Leading Through Free Fall*. The book walks you through the **Three Stages of Innovation Leadership**:

- **Suiting Up** – Set your projects and teams up for success.
- **Free Fall** – Navigate resistance and uncertainty with resilience.
- **Safe Landing** – Ready your innovations for real-world impact.

Use this tool to help your stakeholders process the past and create space for a stronger, more hopeful future.

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Scope with Your Eyes Open

HAVE YOU EXPERIENCED those projects where you find yourself or others asking *halfway through*, “What are we even trying to learn?” or “Why does this even matter?” This untethered feeling is super uncomfortable and anxiety-riddled.

The good news is that it’s also completely avoidable. You can sidestep this fate if you put in the right work up front and approach your scoping and kickoff calls with curiosity and a healthy dose of skepticism.

Let’s unpack that a bit . . .

“Actionable insight” is the catchphrase that makes its way into every research or innovation brief and kickoff call. It’s the Holy Grail that so many strive for, and yet, many often miss this mark. That’s because most people think “actionable insight” is captured in project deliverables—the research, the solution, or the change itself. But this understanding is incomplete. “Actionable insight” can occur only if you, as the innovator, carefully curate the project’s full engagement journey . . . and the first steps in that journey are scoping and kickoff.

At this stage of the “actionable insights” journey, you want to ask the challenging questions: *Why are you doing this? What’s the broader business goal? What are the expectations and hopes that you have for this initiative?*

You pose the above questions with the intent to more clearly frame your initiative. What’s the outcome your stakeholders are looking for? And *why* are they seeking that outcome? How will they use the output of your project as the input for other projects or business decisions?

Friends, this is a meeting that you need to be on point for. You cannot let someone else lead this meeting. And you need to dig deep in your questioning in the conversation. Do not accept anything at face value, as doing so allows for your stakeholder’s blind spots to persist during the scoping process. If those blind spots turn out to be potholes of misunderstanding and erroneous assumptions, that’s when you’ll find yourself in the middle of the project asking those dreaded questions: *What are we even trying to learn? Why does this even matter?*

So, let’s make sure that you ask the hard questions up front. Let me show you how it’s done.

What It Looks Like

A software development team within an international organization asked my team and me to help them think through how to improve one of their collaboration tools.

This team of engineers had built a proprietary collaboration software that operated like a big digital whiteboard. Team members from Alabama could draw on it and all their coworkers in Texas, Russia, and Germany could see what they were doing, as if it were happening on their own boards in real time.

They had written their own product specifications for this whiteboard. The tool had been tested. Everything was

operating smoothly. There was only one problem: No one was using it.

The leader of the team started the conversation like this: “We’ve got some money set aside to further develop this tool, but people aren’t utilizing it. We need to focus on fixing the product experience.”

They were assuming the team wasn’t using the software because of its user experience. They were also assuming that expanded functionality would move the whiteboard from its dormant position in the corner of the conference room to become a center-stage enabler of team collaboration and connection.

These were red flags for me. Something felt off in my gut.

“I think we need to take a step back,” I told the software team. My intuition was telling me this wasn’t a product issue. If it were, people would at least be trying to use the whiteboard, but they weren’t. It was literally sitting in the corner, not plugged in. Few people had detailed feedback about the tool itself, just a unanimous position that what existed “wasn’t working for them.” And yet each person I spoke with was actively involved in creating the base requirements for what this tool should be and how it should work. And because they’re all engineers, I was also pretty confident that nothing got lost in translation.

To say that my spidey senses were turned up is an understatement. The problem we were dealing with was not about the whiteboard tool; it was about workflow and process. Something about how the team did its work and interacted with one another didn’t quite jive with this whiteboard device. This reflection is what set the focus of the research to come.

I told the team, “I think first and foremost we need to understand what collaboration means for your organization.”

It was time for me to get curious. As I asked many questions of this team, I discovered that collaboration was becoming increasingly tricky. They were quickly expanding into new

countries, bringing on additional team members, and encountering more cultural differences across these multiple agencies. The whiteboard had become a glorified solution to a growing sense of unease about collaboration, and ultimately workflow, considering this growth.

When the team approached me about this work, they defined the project as a product usability study. What we ended up conducting was a workflow process study, with the intent of understanding the following:

- What does collaboration mean to this organization?
- What does it look like?
- How and when does it show up?

By scaling out and making the project a workflow and process project, we uncovered that collaboration, in this team, happened when they were working independently, not together. The moments when they came together were moments of *negotiation*. Decisions on resourcing would be made in those connections, and then, outside that meeting, plans would be adjusted accordingly.

The digital whiteboard was trying to change a behavior of the team—to turn a moment of negotiation into one of collaboration, which just wasn't going to happen. That said, there were many opportunities identified to improve the collaborative workflow of the team.

We learned through the workflow and process analysis that this team used seven different systems in their work, with not even one of them integrating with the others. This caused a lot of rework for the team, with a high risk of errors due to manual data entry.

Ultimately, the money set aside to improve the idle whiteboard tool was diverted to further building out the seven other tools. As a result, collaboration improved significantly across this team.

Lead these
conversations with
a thirst for deeper
understanding.
**Seek to parse facts
from assumptions.**

By leading the scoping process with curiosity and a healthy dose of skepticism, this team avoided spending time and money on a study that was too narrow in scope to offer them long-term value. Sure, we could have done a usability study on the digital whiteboard. I'm sure we could have developed new product specifications for that tool as well. Yet, none of this would have moved the needle on improving the team's real goal, which was to enable better collaboration across the team. A further build-out of the team's seven core systems, however, did just the trick!

Your Challenge: Accept Nothing at Face Value

Accepting nothing at face value is easier said than done, right? After all, while you're likely hearing about this problem or project for the very first time, your key stakeholders have been living or talking about it for quite a while.

Therefore, they'll likely come into this conversation confident not only about the problem itself, but also about what needs to be done to solve it successfully. They may define the solution pathway: "We need to improve the user experience of our product." Or dictate methodology: "We need to run focus groups with engineers at each key location of the organization."

This combination of stakeholder confidence paired with a predetermined solution pathway or methodology can result in you, the innovator, becoming an "order-taker"—reacting to what your stakeholders *say* they need instead of probing to understand what they *actually* need.

Stay vigilant, my friend. Take the posture of a question-asker rather than that of an order-taker. Ask the hard questions that will help you understand the real and underlying goals of the initiative.

Accept the Challenge: Adopt an Inquiry-Based Project Scoping Script

As you enter your next scoping connection, I challenge you, innovator, to ask a lot more questions. Set aside the desire to be perceived as having it all figured out and trust the process of discovery. This isn't a sales pitch. You're not selling yourself in this conversation. You're genuinely trying to understand your stakeholders' needs so that you can design a project that will solve their real problem.

Lead these conversations with a thirst for deeper understanding. Seek to parse facts from assumptions. Here's a script that you can use to guide your next scoping conversation:

- 1 Have your project stakeholders communicate the project in their own words.

Example question: Tell me about your project. I've read the Request for Proposal (RFP)/scoping document that you've shared and have some questions, but before we get there, tell me why we're here. What do you most want to learn or accomplish through this project?

- 2 Drill into the specifics of the project topic area and its connection to the broader organization.

Example questions: What has led your team to focus on *this initiative* now? What business decision is the organization trying to make as a result of this work?

- 3 Explore the gaps in understanding, especially gaps that your stakeholder team perceives are holding them back from successful decision-making today.

Example questions: What is holding you back from making that business decision today? What information or insight do you need that you currently don't have?

4 Identify what the “clarity outcome” looks like for your stakeholders.

Example question: How does gaining that information or insight help you and your team move forward toward your broader business goals?

Asking these questions—in this order—helps you to

- get your key stakeholders to share, in their own words, what they believe the project’s scope is (they’ll reveal more when they talk than when they write);
- connect the project to broader business goals and find out if there’s any history that could impact the work—for better or worse;
- identify what’s blocking clarity for the team;
- clarify how the project’s outcomes will help stakeholders make more confident decisions. What will they be able to do that they can’t do today?

I highly encourage you to engage in *live conversation* for this dialogue. Don’t make this a form that you send to your stakeholders. Instead, treat your project-scoping connection like the qualitative, in-depth interview that it is. Lean in to probe the underlying beliefs impacting your innovation scope. Do you need a product usability test? Or are you better served with a workflow or process study, as was the case in the story I shared?

Pay attention to the details, stay fully engaged in the conversation, and probe the yellow and red flags that arise in the connection. Sometimes your stakeholders’ preconceived solutions or methods are correct. But many times—*oftentimes*—they are not.

What to Expect

Calling bull on your stakeholders can be terrifying—especially if they’re more senior to you. You might feel vulnerable going into this conversation, hesitant to ask the hard questions. You don’t know them; they don’t know you. They might question your knowledge, leadership, and capabilities. However, I urge you to move past your discomfort here. Your stakeholders will thank you and your project will be so much better when you do.

As humans, we naturally want to make ambiguous situations feel more concrete. So, we make declarative statements about solution pathways and methodologies as a way to feel more “in control” of the less-than-clear innovation challenge ahead of us. Your stakeholders are not trying to mislead you or the project. Most of the time, they haven’t paused to recognize or question the assumptions they’re presenting as facts.

This is where you come in. You turn off the autopilot. When you lean in with curiosity and probe with a healthy dose of skepticism, you walk away with a full understanding of what the team wants to accomplish. When you do this, you’ll

- earn trust and credibility from your stakeholders;
- stay centered, grounded, and focused on the business decisions your work drives;
- scope the project to yield actionable insight that advances the business.

Mindset Shift: Accept Nothing at Face Value

Resist the urge to let your stakeholders lead the way. Yes, they're more familiar with the ins and outs of the problem. But they may be too embedded in it to see the forest for the trees. You know how to shape change-making processes to yield business impact. Be the question-asker rather than the order-taker in project scoping and kickoff to make sure you get real *actionable insight*.

From Order Taker to Strategic Partner

By using the Inquiry-Based Project Scoping Script, you've taken the first step in redefining your role as a researcher or innovator. No longer just executing on surface-level asks, you're uncovering the "why" behind projects, surfacing blind spots, and aligning initiatives with the outcomes that matter most.

This is just one of the **17 tools** in *Leading Through Free Fall: How Innovators Turn Turbulence into Trust*. Each chapter provides practical guidance to help you embrace resistance, manage the messy humanness of innovation, and lead with clarity through uncertainty.



Get the full book now and step into
your next chapter with confidence:

