



Project Planner™

A reusable planning system for defining, delivering and reviewing a project.

PROJECT		OWNER	
START		TARGET END	
STATUS		VERSION	

DEFINE THE WORK

Project Purpose

We are doing this project because _____

Successful outcome

At completion, the result will be _____

Success measures

MEASURE	TARGET	HOW MEASURED

Constraints & assumptions

Budget / resources	
Deadline	
Quality requirements	
Key assumption	
Non-negotiable	

CREATE CLEAR BOUNDARIES

Scope & Stakeholders

Agree what the project includes, what it excludes and who needs to be involved.

Scope

IN SCOPE	OUT OF SCOPE

Key deliverables

DELIVERABLE	OWNER	DUE	ACCEPTED BY

Stakeholder map

STAKEHOLDER	NEEDS / INTEREST	INVOLVEMENT	CONTACT

Communication rhythm

Updates will be shared _____
Decisions will be made by _____

SEE THE ROUTE

Milestones & Timeline

Break the project into meaningful checkpoints with visible completion criteria.

#	MILESTONE	START	DUE	OUTPUT / CRITERIA	OWNER	STATUS
1						
2						
3						
4						
5						
6						
7						
8						

Dependencies

ITEM	DEPENDS ON	NEEDED BY	OWNER	CONTINGENCY

MAKE THE WORK VISIBLE

Task Tracker

Track the next useful actions. Use additional copies of this page for larger projects.

#	TASK	OWNER	START	DUE	PRIORITY	STATUS	DEPENDENCY
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

This week's focus

#	NEXT ACTION	OWNER	DONE WHEN
1			
2			
3			

PREPARE BEFORE PROBLEMS GROW

Risks, Issues & Changes

Separate possible risks from current issues, then give each one an owner and response.

Risk register

RISK	LIKELIHOOD	IMPACT	RESPONSE	OWNER	STATUS

Issue log

ISSUE	RAISED	ACTION	OWNER	STATUS

Change requests

CHANGE	IMPACT	DECISION	OWNER	DATE

We will escalate when _____

KEEP ALIGNMENT AND MEMORY

Meetings & Decisions

Capture only what changes the project: decisions, actions, owners and dates.

MEETING		DATE	
FACILITATOR		ATTENDEES	
OBJECTIVE		NEXT MEETING	

Discussion notes

Decisions

DECISION	MADE BY	DATE	REVIEW

Actions

ACTION	OWNER	DUE	DONE
			☐
			☐
			☐
			☐
			☐

CLOSE THE LOOP

Project Review & Close-Out

Confirm completion, transfer ownership and capture lessons for the next project.

Completion checklist

☐	Deliverables meet the agreed acceptance criteria.
☐	Stakeholders have approved or accepted the outcome.
☐	Outstanding issues have owners and dates.
☐	Files, instructions and access have been handed over.
☐	Budget, suppliers and contracts have been closed.
☐	Results have been measured and communicated.

Outcome review

MEASURE	TARGET	RESULT

Lessons learned

What worked well? _____

What would we do differently? _____

What should become a repeatable process? _____

Handover

ITEM	NEW OWNER	LOCATION / NOTES

PROJECT RESULT _____ / 10	CLOSED ON _____
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The future isn't something you wait for. It's something you build.