

Planning Workbook

Your working document for detailed planning. Scope it, break it down, timeline it, staff it, risk-assess it. All in one place.

Context

Project Name	
Project Lead	
Date	
Brief Approved On	Reference to the approved Project Brief

1. Scope Definition

What are you doing and, just as importantly, what are you not doing? Be explicit now to prevent pain later.

In Scope	Specific deliverables, systems, processes, or outcomes included.
Out of Scope	What is explicitly excluded? Name it. If someone might assume it's included, call it out here.
Key Constraints	Budget caps, hard deadlines, technology limitations, regulatory requirements, team availability.

Success Criteria

Measurable outcomes everyone agrees to. These become the finish line in your Project Charter.

Criteria	Target	How Measured

Open space: What scope questions are still unresolved? What needs further discovery or stakeholder alignment?

2. Work Breakdown

Break the project into every piece of work. Nothing is too small to list. Things you forget here blow up your timeline later.

#	Task / Deliverable	Owner	Depends On

Gaps & Trade-offs

Where are you short on people or skills? What are your options: reallocate, hire/contract, reduce scope, extend timeline? Be explicit about the trade-offs.

5. Risk Assessment

What could go wrong? Think about people, technical, dependency, scope, and political risks.

Risk	Chance	Impact	Mitigation Plan

Assumptions

What are you assuming to be true that, if wrong, changes the project?

Assumption	Impact if Wrong

Dependencies

What do you need from other teams, systems, or external parties?

Dependency	Owner / Source	Needed By	Status

Open space: What keeps you up at night about this project? What's the risk nobody wants to say out loud?