Navigate ADVISORY GROUP

FILLED FICTIONAL EXAMPLE

Project Plan Template

Plan the deliverables, responsibilities, dates and resources for your next project. Start with the brief, agree the action plan, then review what changed.

Fictional retailer launching click and collect

Lead and approver Amira | Target 20 November 2026 | Next review 6 November 2026

Outcome and success check What should improve, for whom, and how will you recognise a useful result? Pilot click and collect at one shop. Complete five staff test orders with correct stock, confirmation and collection records before accepting customer orders.	**Deliverables and acceptance** Name the usable outputs and who accepts each one. A tested checkout collection option, stock-check routine, customer messages and staff collection checklist. Shop manager accepts the end-to-end test and pilot readiness.
Included and excluded Where does this assignment start and stop? One shop and a limited product range using the existing website. Excludes delivery, a new inventory system and a second shop rollout.	**People and capacity** Name the project lead, contributors, approver and time they can actually commit. Amira leads and approves. Ben configures the website. Jo tests the shop process. Estimates total 38 staff hours across three weeks, fitted around shop cover.
Constraints and risks Record dates, spending limits, assumptions and what could prevent completion. Pilot target 20 November 2026. AUD 1,500 incremental-spend limit, excluding GST. Staff hours are separate, not a wage-cost estimate. Inaccurate stock could cause failed collections.	**Review and change decision** When will you review? Who can accept a change and its effect on time, cost or other work? Review each Friday with Amira. If stock tests fail, narrow the range or delay launch. Keep shop two out of scope until the first pilot review, rather than consume the same staff capacity twice.

Complete the action plan on the next page. Use the priorities companion only if work competes for time.

Action Plan

One owner per action. Keep IDs stable. Dependencies are agreed links, not automatic rescheduling. Add rows as needed.

Example estimates: 38 staff hours and AUD 1,200 incremental spend excluding GST. Spend limit AUD 1,500. Staff time is not included in spend.

ID and work Done when	Owner	Start and due Dependency IDs	Effort Budget	Status	Next action and date	Completion evidence
P1 Agree pilot range and stock check. Done when ten sample items reconcile.	Amira	2026-11-05 to 2026-11-06 After None	6 hours AUD 0	In progress	Jo checks ten items on 6 Nov.	Range draft saved. Stock check still open.
P2 Configure checkout and collection message. Done when a test order offers the correct shop.	Ben	2026-11-09 to 2026-11-11 After P1	12 hours AUD 600	Not started	Confirm stock-check result before configuration.	
P3 Test pick, notify and handover. Done when five staff orders pass and exceptions are recorded.	Jo	2026-11-12 to 2026-11-16 After P2	10 hours AUD 200	Not started	Book two staff testing slots.	
P4 Approve pilot and brief staff. Done when Amira accepts tests and each shift has cover.	Amira	2026-11-17 to 2026-11-20 After P3	10 hours AUD 400	Not started	Review test failures before confirming launch.	

Review and change record

At the review, confirm evidence, blockers and the next action. For a change, record the request, effect on dates, effort and spend, the approver and the decision.

6 Nov review: stock check is still open. Do not start P2 until P1 is accepted. A failed check means narrowing the product range or moving the launch date. Amira decides and records the change.

The Excel companion has editable blank and example tabs, calendar-day calculations and complete effort/spend totals. This Word table is manual.

Prioritisation Matrix Template

Compare a few realistic choices. Agree hard obligations and actual capacity first. Record Now, Next, Delegate, Defer or Stop with a reason. No weighted score is applied.

Decision owner Amira | Review 27 November 2026 | Constraint Same staff must cover the shop and pilot

Candidate work	Importance and urgency Evidence and leverage	Effort and capacity Risk and dependencies	Decision and reason	Owner and next action
Verify pilot stock	Prevents taking orders for unavailable items. Check ten sample items. Must precede website configuration. Enables checkout setup and reliable collection tests.	6 hours. Jo can help during Thursday stock count. Unknown stock accuracy. No prior blocker.	Now. Resolve the uncertainty before committing configuration time.	Amira. Complete sample check by 6 Nov.
Launch a second shop	Wider reach is possible, but the first-shop process is untested. No external deadline. Reuses the pilot only after it works.	Would use the same staff capacity as the pilot. Depends on pilot evidence and shop cover.	Next. Review after pilot rather than split the team now.	Amira. Review on 27 Nov.
Redesign collection packaging	Appearance could improve. No current evidence it prevents a collection. No obligation before pilot. Limited enabling effect for this launch.	Supplier quotes and extra staff time not yet known. May delay pilot and add unagreed spend.	Defer. Revisit if pilot feedback shows a material problem.	Jo. Note actual packaging issues during pilot.

Choose the stock check first. Keep the second shop and packaging redesign outside this pilot so the same people can finish and test the first-shop service.

Leverage is reusable benefit; enabling effect is other work this unlocks. Unknown effort, risk or evidence needs a next check, not a zero. This companion is distinct from the urgency/importance Eisenhower Matrix.

Project scope, action planning and deliverable acceptance are established project-management practices. The light prioritisation companion considers importance, urgency, leverage, enabling effect, effort, risk and dependencies. It is a judgment aid, not a weighted score or the separate Eisenhower Matrix. Original Navigate explanations, layouts and fictional examples.

Working files and guidance: navigateadvisorygroup.com/articles/project-scope