Navigate ADVISORY GROUP

YOUR WORKING TOOL

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.

Project _____ Business or client _____ Prepared by _____

Project lead _____ Approver _____ Target date _____ Next review _____

Outcome and success check What should improve, for whom, and how will you recognise a useful result?	**Deliverables and acceptance** Name the usable outputs and who accepts each one.
Included and excluded Where does this assignment start and stop?	**People and capacity** Name the project lead, contributors, approver and time they can actually commit.
Constraints and risks Record dates, spending limits, assumptions and what could prevent completion.	**Review and change decision** When will you review? Who can accept a change and its effect on time, cost or other work?

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.

Effort unit _____ Currency and tax basis _____ Spending limit _____ Available people and time _____

ID and work Done when	Owner	Start and due Dependency IDs	Effort Budget	Status	Next action and date	Completion evidence

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.

Review date _____ Change or blocker _____ Decision and approver _____

Next action _____ Owner _____ Due _____

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 _____ Review date _____ Capacity or hard commitments _____

Candidate work	Importance and urgency Evidence and leverage	Effort and capacity Risk and dependencies	Decision and reason	Owner and next action

Chosen work and reason _____

Carry into action plan ID _____ Owner _____ Review date _____

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