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The Project OneSheet Planner

THE POWER OF REMOTE

CYNTHIA WATSON & SHANE SPRAGGS

"What a delightful book."
— Dave Ulrich, BusinessWeek's #1 Management Educator

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Capture Project Essentials
On One Page!

At the start of any project, you need to define exactly what success is
or the sponsor, user and stakeholders.

You also need to assess the project's feasibility, and
envision outcomes.

Virtira's Project OneSheet Planner streamlines this
process, providing a comprehensive overview and solid
foundation for you to build from.

Use the following questions and sample worksheet to
clarify goals and responsibilities from the outset, so that
you can more easily communicate these and start on a
solid foundation.

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Embracing the Reality of Most Projects

In business management, most projects are informal and don't require the rigid structures of major undertakings like constructing buildings or launching space missions.

Many initiatives start with a simple idea from an executive, leading to a vague request that soon becomes an entry in tools like Asana or Jira.

Too often, people are loosely assigned, assumptions are made, and the project begins, often with unclear start and end dates.

Pull Everything Together With the Project OneSheet Planner

Virtira's **Project OneSheet Planner** condenses essential project information onto a single sheet, keeping everyone informed and prompting consideration of key questions.

Whether you need formal charters or informal notes, the OneSheet provides an excellent, concise summary of key elements.

Who Prepares the Project OneSheet?

Typically, a project manager prepares the Project OneSheet as soon as they are assigned, before significant work begins.

However, it can be created by anyone responsible for a project, initiative, priority, or time-sensitive task. This flexibility makes the Project OneSheet invaluable for ensuring clarity and alignment from the start.

Project OneSheet - Questions

What is it?

Start by briefly explaining the project's deliverables in plain English, focusing on the highlevel output. This gives context to the reader for the rest of the sections.

Think of it as an elevator pitch—succinctly summarize what you're working on in 2-3 lines.

Why are we doing it now?

This section is the heart of the document. It challenges the author to justify why this project is a priority over others.

Outline how this project aligns with the overall goals of the team, product, department, and business. Explain its impact on customers or internal stakeholders and describe the changes once the project is delivered.

Focus on the project's outcomes and their significance. Done well, this section should mirror the success criteria.

When is it?

Starting date – Ending date (or estimates)

Who is this for?

Make a point-form list of everyone who will directly benefit or be affected by the change this project will bring.

- • Will it make someone's job faster?
- • Will it offer a feature customers have been asking for?
- • Will it save someone's life?

Outline your project's internal, external, direct, and indirect stakeholders, summarizing the impact on each.

Understanding all stakeholders ensures the right deliverables and effective expectation and communication management. This section will list everyone to keep informed throughout the project's lifespan.

What is included?

This section can be tricky as you might be inclined to create an exhaustive list of all the tasks or, alternatively, a list of high-level milestones.

Instead, list the expected deliverables from the customer's perspective, focusing on what they hope will be delivered.

Avoid exhaustive task lists or high-level milestones. Instead, highlight meaningful deliverables, whether big or small, regardless of the effort required. This will create a point-form list of key deliverables important to stakeholders.

What is not included?

Clearly outline areas the project will not address. Specify untouched product areas, steps left intact in process improvements, and excluded ideas from brainstorming sessions.

This helps manage expectations, especially for C-Suite executives who may skim the document. Highlight this section to confirm their needs are accurately captured, even reading it to them if necessary.

Done well, this section prevents scope creep.

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What could stop us?

Are there known or unknown risks – timing, regulations, costs – that could stop this project from being successful?

Who could stop us?

Identify any people-related risks that could delay or derail the project, such as required approvals or signatures, and potential issues with stakeholders like suppliers, customers, or contractors.

Don't forget legislation or cross border data issues that could derail things.

What is the investment?

The true cost of business projects is often overlooked.

Document the expected cost in terms of time, people, and money, without needing a detailed budget.

Note how long the project will keep the team busy and any specific time commitments. For example, you might list that it's expected to keep the project team busy for 4 months or that you will need a specific person for 10 hours a week for 6 weeks.

If known, include a high-level budget for procurement costs.

Done well, this section provides another point of data when prioritizing and selecting competing projects.

How will we know we are successful?

Often overlooked in business projects is how you measure its success when it's finished, so you should try to identify measurable criteria to prove the project's success and clarify its purpose.

- Avoid vague qualitative goals and ensure success measurements are tangible and quantifiable.
- Capture the current state before starting to compare against post-project metrics.
- Focus on changes that matter to the business, rather than just completing the project on time.

Done well, this section should capture changes to metrics that matter to the business and justify the inception of the project in the first place.

Download The Project OneSheet Template

Project OneSheet Planner |

What is it?

When is it?

Starting:

Ending:

Why are we doing it now?

Who is this for?

What could stop us?

Who could stop us?

What is included?

What is the investment?

What is not included?

How will we know we are successful?

Creating more efficient teams, one project at a time.

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