

One Page Plan

“A goal without a plan is just a dream” – Antoine de Saint-Exupery

“Plans are worthless, but planning is everything” – Dwight D Eisenhower

“Everybody has a plan until they get punched in the face” – Mike Tyson

Planning is almost as fraught with ambiguity and tension as strategy. So many people report suffering from “planning paralysis” as they try to anticipate and solve all the problems they could encounter, or get stuck in “alignment hell” as multiple teams pull in different directions.

Assuming you have already set out a strategy and have draft goals for the quarter (I recommend OKRs), this document lays out a refreshing approach to planning that will facilitate the difficult conversations throughout the quarter rather than trying to resolve them all at once. And it will help you nail down the right final goals, confident that they are at least somewhat realistic with the resources and other responsibilities you have available.

Planning Mistakes

There are two common mistakes people make with planning:

Blueprint Plans: They write a detailed plan with every step and contingency covered. It’s beautiful (if it’s ever finished!), it’s big, and it’s useless. Nobody ever looks at it, and it never changes. The act of writing it probably helped clarify what to do, but this one is too big and too cherished to adapt to reality. So it goes into the round filing cabinet¹ and the writer is demoralised.

Cowboy Plans: “We don’t plan, we’re Agile”². Ask them for the plan, and they can list out what they intend to do, but it’s never written down anywhere more permanent than a Slack message, and it’s different every time, though they aren’t aware of the changes because the old plan is forgotten already. Expectations are often missed, stakeholders are frustrated, and the team is often in limbo.

These both have the same root cause – a misunderstanding of what planning is for.

¹ The bin, or “wastepaper basket” if you’re from the other side of the Atlantic.

² I know, experienced Agile practitioners don’t say this, but I’ve heard it said as an excuse not to plan often enough.

Why Plan?

Planning has three purposes:

1. To be a **basis for change**, so you can assess the impact and trade-offs clearly before making a change.
2. To identify **risks and problems**, especially with dependencies or stakeholders who have expectations, so you can address them at the right time.
3. To generate **shared ownership** between teams, peers, managers, and stakeholders so there is a higher chance of success and more collaboration.

The key to doing this with a plan is to have a **One Page Plan**, written with the intent to be understood by a wide audience, gather their input, and integrate it with revisions. As those people contribute, they become co-owners of the plan, even if it's not for *their* team.

The Planning Habit

The foundation of your Management Operating System is the habit of writing, reviewing, and revising plans to meet your goals while running your business.

I call this a habit because in most companies, planning happens in a short period before the quarter begins where everyone tries to align with everyone else all at once. Trying to align everything at the start of the quarter is never going to work well, because aligning is hard and ongoing work – especially as things change. The work of aligning all at once is high-stress and not very productive – and then the plan is never referred to again (or worse, it's followed religiously and never changed).

Instead, the **owner** should write a **One Page Plan** that is easy for others to read and understand. They then review it with peers, managers, stakeholders, and teams, and take input to revise it. Throughout the quarter, they review it regularly with these same people, take further input and revise the plan as they learn and align.

This plan is then the basis for your execution cadence, not as a blueprint to be followed, but as a basis for change to be iterated on, and the planning habit reveals misalignment naturally and prompts the ongoing work to resolve it.

Golden Rule: Don't do all the work!

The plan is a plan, it's not the work.

Don't solve all the problems now. You have the whole quarter to do that. The plan is there to highlight the problems you know of so you can solve them during the quarter, and to help you identify more problems as you go. Of course, if you can solve an important problem immediately or with a half hour meeting, don't wait - but if it's more complex, add "solving this problem" to the plan.

It helps to keep your plan short - 1-2 pages if possible - because this limits you to the essence of planning, rather than allowing you to get carried away doing all the work. This also helps ensure that the plan can be reviewed, understood, and revised easily.

The One Page Plan

There are many approaches to planning, and if yours works well for you, use that. Some situations (for example major capital works) require substantially more detailed planning, and a rigorous project management approach.

This is an approach I've found that works in most cases where change is constant and there is a lot of ambiguity (for example, software development). If you want to experiment with it, but already have your own approach in use, there is no need to repeat or discard existing planning work, just collect it together in this simple form to drive collaboration.

Who should write a One Page Plan

Every team should be covered by a One Page Plan, and every owner should write a One Page Plan for the OKRs they own. Try to organize this logically according to your organizational structure and err on the side of fewer plans.

The simplest approach is that each member of the C-Suite would write a One Page Plan for their team and the OKRs they own. In larger organisations it can help to have another layer of plans, or to delegate some plans to the next level of leadership and have the relevant C-Suite members act more as reviewers, synthesizing across multiple plans to facilitate collaboration.

Writing a One Page Plan

Writing the document is relatively easy – it's deciding what goes in it that is hard!

Start with your strategy (you have one that you're aligned on, right?). Break it down into the specific actions that you can take this quarter with the resources you have available to you. Analyse the problems, breaking them down to smaller pieces, prioritise them, estimate them and then synthesize it all back into a whole – and allocate resources. Don't worry too much about future quarters, you'll plan for them when they come.

Then review with other teams to find the most critical missing dependencies, conflicts, or missed opportunities. You don't need to find all of them, and you don't need to resolve them all immediately – it's OK to leave some work for the rest of the quarter! Sometimes it's best to put in your plan the work to resolve one of these problems later, when you have more information about it.

Objectives and Key Results

Start by writing the Objectives and/or Key Results (or other goals) you're going to be addressing at the top of the page. Clearly mark those you own and note the owners of the others.

You may also want to list major processes you are responsible for on top of these – for example, a software team may include Production Software Support and Custom Integrations.

Planned Initiatives and Processes

Now write down the Initiatives³ you plan to deliver the OKRs, and the Processes you run for Business As Usual. No need to include everything but try to account for the bulk of your resources and the major contributors to success in each OKR or area. Aim for a maximum of half a page for this section, so if there are 20 initiatives and processes, you have one line each. If it helps, tag each one with the OKR it supports.

Organise these in a logical fashion. Here are five options, but most important is to use a structure that makes sense to other people in your organisation. It may help to collect the Processes together at the top or bottom, keeping them separate from the Initiatives.

Structurally. Organise initiatives by function, for example Marketing, Sales, Onboarding, etc, or by the component of business they affect (eg in eCommerce Software you might use Search, Checkout, Shopping Cart etc).

By Category. Organise them into logical buckets that have something important in common. For example, by OKR, by customer segment, or by geography.

By Size. Organise initiatives into large, medium and small projects (you can call them big rocks, stones and pebbles if you like).

By Priority. Organise your projects according to their impact and effort.

Sequentially. Put them in the sequence you've decided to do them in. For example, "First, ... Then ..."

The structure you choose to communicate your proposed solution will help you create a shared understanding with your peers. Ask yourself "What is the most natural structure here that everyone will understand?"

Resources and Dependencies

For each Initiative or Process (you can use a table that refers to the list of initiatives and processes, or if you only have a handful of initiatives and processes, integrate it all into one table), record what resources you need to deliver them, including any other teams you depend on. Record this how it best makes sense in your domain – dedicated headcount, team names, person-weeks, etc.

Leave room for a **confidence assessment** for each Initiative or Process, and for each dependency. I use traffic lights – green means on track, yellow means we may need help, red means it won't be delivered with the current plans. You can fill these in from the start based on whether the dependency has included the required work in their plans and how credible you find their plans.

³ You might call these self-contained one-off pieces of work projects, features, products, campaigns, or something else. I differentiate them from Processes because they have a defined start and end, while Processes tend to be ongoing.

Optional Sections

At this point, you have the basic plan complete, and everything else is optional, but can help drive the right conversations – remember, the goal of the plan is to drive collaboration. Sometimes it's best to stop here and start reviewing with peers, teams, managers, and stakeholders, and then add further sections as needed based on those conversations.

Non-Plan Items. If you have many stakeholders expecting things from you, it can help to write down the things you are explicitly not going to do – and who is depending on them. Do this in the same form (with Resources etc) as you write your Initiatives and Processes, because as you negotiate, you may need to move some Items between Plan and Non-Plan.

Metrics and Milestones. If your Key Results are not sufficient to measure progress, note down any other ways you (and your team, managers, peers and stakeholders) can track progress. This might be a projection of how particular metrics will evolve over time (if not obvious or linear), or a set of milestones you plan to meet with dates. These will inform conversations as you go.

Risks. If there are specific risks that it's worth drawing attention to, list them here. Don't be a lawyer about it, even if you are a lawyer. There's no need to list every risk, it's not a legal contract and this isn't an ass-covering exercise. Just list the ones you want to draw attention to, where you or your stakeholders predict there may be problems and where you'd like a reminder to discuss regularly.

Hotly Debated Topics. As you review your plan with other people, you may find that there are topics that cause a lot of debate. The best way to deal with these is to write the topic down, and the various perspectives in a sentence each. You don't have to change the plan based on their input if you don't want to (though maybe you should!), but it helps to represent their views, so they feel heard and not ignored, and are therefore more likely to be collaborators than detractors.

The Write-Review-Revise Loop

Now you've written a draft One Page Plan (and plans are **always** drafts – remember they are a basis for change, not a perfected blueprint), or even as you are in the process of writing it, review it with everyone involved or affected – your team, managers, peers, stakeholders, and dependencies.

Include and listen to reviewers from outside your function, especially if you are at executive level. This is an opportunity to learn from different perspectives, as well as to share your own and educate them on your area of responsibility. This, in turn, creates a stronger cross-functional collaboration than functional experts who stick within their area of expertise.

If you've kept it short, it will be easy to review, and your reviewers will be able to contribute meaningfully to improving it and aligning with their own plans. Take their feedback and revise the plans to account for it. Remember, you don't have to do everything they suggest, because you own the plan – but your goal is collaboration to get the best result, rather than proving your plan is correct!

Reviewers Guide

If you've been asked to review a One Page Plan, you're a co-owner of that plan.

Even if you're not an expert on the subject matter, your questions and suggestions are valuable. Here's a quick guide to common questions you can ask while reviewing, but don't restrict yourself:

- Why are we doing this?
- Is there a better way to do it?
- Have you considered this idea?⁴
- Have you considered this impact?
- Have you considered this risk?
- What about that dependency?

If you read something you don't understand, don't just skip it as "not my domain". It's your responsibility to understand everything at this level. This may mean asking the owner to explain it or teach you about their domain, or even rewrite it so you can understand it (experts are often unaware of their own confusing jargon).

Dealing with Conflicts

If you disagree with something, it's your responsibility to make a case. You may need to involve other people to get to a resolution, especially if the issue is complex. These conflicts can be painful, but the purpose of the plan is to surface these conflicts while there is time to resolve them, rather than waiting until they are critical issues.

Use the OKRs and Strategy as a guide for resolving conflicts.

Usually, they help prioritise and focus on what's important (that's their purpose after all!). If they conflict, or if they don't help, and if you can't resolve it directly, escalate to your manager(s), who may have more context and be able to guide or decide.

Once the issue resolved either way, it's your responsibility to work with the owner to make the plan as successful as it can be. Nothing is worse than a plan which fails because someone disagreed and wouldn't cooperate – better to commit in earnest and have the plan succeed or fail on its own merits.

Conflicts with Dependencies

In many cases, there will be a specific type of conflict around dependencies. A team can't deliver the work that some other team depends on as well as their other responsibilities with the resources they have

⁴ Don't be afraid to share ideas from your own domain or experience. Often, problems have a lot in common across domains despite using different jargon and technologies, and sometimes this is where breakthrough innovations happen.

available. The only approach to resolve this is to make trade-offs, and this is inherent to the work of management in any non-trivial organization.

There are three basic options, not all of which are possible in every situation:

1. **Redefine:** Change the scope or definition of the work in such a way as to get 80% of the value with 20% of the effort⁵. This is more often fruitful than most people expect, but it does require an up-front investment of effort to find alternative approaches.
2. **Reprioritise:** Choose something else to drop to meet this dependency. Seeing all the major initiatives and processes on one plan helps do this in an informed manner. If the plan also includes the value each one is delivering and what depends on it, it's even easier to have this discussion and involve the right stakeholders.
3. **Reallocate:** This is like reprioritizing but involves allocating more resources (people) to the team from somewhere else in the organization so that more of this high priority work can get completed. This carries its own risks, as more people can make projects go slower rather than faster⁶, and there's often delays or other impacts from the re-allocation.

If none of these are possible then the harsh reality must be faced up to. This dependency is not important enough to get done relative to the other things on the list. This can be a difficult conclusion to come to, but, assuming it is the right decision, the work put in to assess it was worthwhile, and you can now all agree to focus efforts elsewhere.

Using the Plan during the Quarter

During the quarter, use the plan as the basis for your weekly execution meeting discussions, and continue to update it as a living document.

Do this not just to keep you on track, but to re-assess dependencies and risks. As you review your plans together, you may uncover problems – a dependency has encountered an issue, a change of plans has been made that affects you, or perhaps something was harder (or easier!) than expected.

Write Weekly Updates

In weekly team meetings, most teams default to verbal updates, because they are easier to give. However, they are harder for others to follow, and you get less value from them, especially as people tune out when it isn't their turn.

⁵ The Pareto Principle usually applies when you look hard enough – and the numbers, while seemingly arbitrary, are surprisingly predictive. I have had situations where a feature was originally scoped at six months of work, and then after using this principle aggressively, we found an alternative approach to get most of the benefit with just two weeks of work. Of course, we missed out on certain other benefits, but those benefits were not worth the extra effort required to do it “properly”.

⁶ Refer to Fred Brooks' 1975 essay “The Mythical Man Month” for a discussion of how this works in software projects.

Instead, send written updates about your progress in advance, and read them at the start of the meeting. You'll have a more efficient meeting, with higher value conversations because everyone will have the information in front of them.

The updates should be brief – half a page maximum, ideally less. Nobody wants to read a bunch of multi-page essays. Refer to the plan and link to it or include it as an appendix to make it easy to review.

In your update, summarise what progress was made on various initiatives, and any changes to the Plan you have made. Report any updates to the key results or other metrics and milestones – and if you have any new ones or have discovered some to be less than useful.

If you have encountered any problems or uncovered any new risks, report them. If you've got concerns about a dependency based on something that happened this week, state that in the update (and make sure you've let the owner of that dependency know that you have concerns before they come to the meeting!). If these problems, risks, or concerns are already resolved, state the resolution as part of the update; if not, highlight them as candidate discussion points when you review and revise the plans.

Review and Revise Plans

During the meeting, you are having discussions about what changes to make to the plans. The participants have full context from the updates and other metrics reviewed in the meeting and can have informed discussions and make decisions about what needs to be changed.

Refer to "The Write-Review-Revise Loop" on page 5 for a guide on how to drive this discussion productively.

The changes raised will fall into three categories:

- **Immediate actions** that can be taken with no further discussion. Record the action, the owner, and the expected completion date.
- Actions that require a **dedicated meeting**, perhaps with a deeper analysis to solve. Allocate an owner for the meeting and the analysis if needed and record exactly what decision needs to be made. As always, record the action, the owner and expected completion date.

If the right attendees are present, set up the meeting immediately. If not, record another action to set up the meeting with the right attendees.

- Decisions where the action in the short term is to **update the plan** and work through the impact on dependencies. Update the plan and work through the dependencies immediately if possible; if not, take an action to do so, possibly including a dedicated meeting as above. As always, record the action, the owner and expected completion date.

After the meeting, the AI-taker or meeting chair can share the actions with everyone, any changes to plans can be recorded and implemented (writing it down doesn't make it happen!), and the work for the week begins.

The following week, the progress on these actions should be shared again as part of the updates.

A. Example⁷ Plan:

Onboarding Team QX 20XX

OKRs

Objective	Key Result	Owner	Support
3. Get Ready for Massive Scale			
	1. Increase Weekly Unique Visitors to Website from 2,756 to 20,000	Marketing	N/A
	2. Enable customers to onboard self-service	Product	Supported
	3. Increase number of clients onboarded per day from 247 to 600 (7 Day Rolling Average)	Us	Owned
	4. Decrease number of inbound support requests per customer per week from 0.4 to 0.01 (7 Day Rolling Average)	Customer Support	Not Supported

Initiatives

Initiative	Sub-Initiatives	Milestones	Resources & Dependencies	Risk
1. Grow Team: OKR 3.3 Hire, onboard and train 3 more Onboarding Analysts (Pending Finance approval)		1: Wk 7 2: Wk 10 3: Wk 12	10% team allocation each week – Business As Usual	High
2. Increase Throughput: OKR 3.3 Increase clients per Analyst per day from 50 to 75		See metrics projection below	40% Senior Analyst	Medium
	1. Onboarding Tool v2: +10% efficiency	Wk 5	Dev Team A (25 pw⁸) 10% Senior Analyst	Low
	2. Improve Documentation: top 7 issues	Wk 8	20% Senior Analyst	Low
	3. Review workflow: identify inefficiencies	Wk 12	10% Senior Analyst	Medium
3. Onboarding Handover Flow: OKR 3.2 (Sales) Define a self-service Onboarding Handover Flow		Wk 11	10% Senior Analyst	Low

Processes

Process	Status	Resources
a) <i>Onboarding Clients</i>	Owned	90% of 5 Analysts, onboarding 50/day each on average
b) <i>Hiring Analysts</i>	Owned	10% of 5 Analysts (plus 30% Hiring Manager)

Resources

- 1 Manager – 30% Hiring, 70% Managing
- 1 Senior Analyst – 50% Onboarding Clients, 40% Increase Throughput, 10% Onboarding Handover Flow
- 5 Analysts – 90% Onboarding Clients, 10% Hiring (10% of one analyst supporting product)

Non-Plan

⁷ This is an entirely hypothetical example, but you can understand much of the hypothetical context from this plan alone.

⁸ Person Weeks – use whatever makes most sense for your organisation. If it's variable, say 25-40 pw, then write that down. If it requires something else, write that down as well – eg 25pw & €2000/mo opex. (Opex is operational expense – like server costs for example).

Initiative	Resources
4. Client Tiering: Customer Support (OKR 3.4) Tiering clients to provide differentiated onboarding and improve client education to reduce support load	Unknown
5. Update Onboarding Process: Product Modify Onboarding Process to include new features launching this quarter	Unknown

Metrics

Clients Per Analyst Per Day

Week	1	5	7	8	10	12
<i>FTEs</i>	4.5	4.5	5.5	5	6	8
<i>Per FTE</i>	50	55	55	60	60	75
<i>Clients/wk</i>	225	240	290	350	420	600
<i>Est Total</i>	225	1140	1670	2020	2790	3810
<i>Comment</i>	Start Improve Documentation (2.2): -0.5 FTE	Onboarding Tool v2 (2.1) complete: +10%	Grow Team (1): +1 FTE	Finish Improve Documentation (2.2): +0.5 FTE; +10%. Start Review Workflow (2.3): -1 FTE	Grow Team (1): +1 FTE	Grow Team (1): +1 FTE. Finish Review Workflow (2.3): +1 FTE, +25%

Risks

- **Grow Team (1):** We have never hired that fast before. More realistic is Wks 15, 18 and 25, impacting projected metrics.
- **Review Workflow (2.3):** significantly unknown effort and benefit.
- **Improve Documentation (2.1) and Review Workflow (2.3):** Dedicating Senior Analyst to projects may have higher impact on onboarding pace as they take the most complex cases.
- **Total Onboarded:** Sales projects ~5000 new clients by wk 12 so we could be behind by up to two weeks and growing.
 - **Request:** Increase Headcount allocation to +6 and start hiring so we can catch up in following quarters.

Hotly Debated Topics

Client Tiering/Reduce Support Load (OKR 3.4/Non-Plan 4): We have been asked to help **Customer Support** reduce the number of support requests per client with improvements to client education, driven by a tiering project (non-plan 4).

- **Invest:** Tier clients and provide differentiated service and then improve client education and tune the onboarding process to eliminate common errors that lead to customer support tickets later for the largest tiers
 - **Reasons:** This will help Customer Support reach OKR 3.4
 - **Concerns:** We believe we will have some improvement as a side-effect of plan to improve documentation (2.2) and improve workflow (2.3), but if we split our attention, we risk missing both, as well as taking extra resources away from onboarding to support this work.
- **Delay:** Until next quarter
 - **Reasons:** We will have significantly more data and leverage to improve after this quarter is finished, and we believe improving onboarding pace is more critical than customer service efficiency
 - **Concerns:** Customer Support estimate they will only reach 0.1 without help from Onboarding

Our Decision: To delay to next quarter where we can more easily dedicate a person to this without affecting onboarding. The additional clients onboarded will give us additional revenue to support higher support workload with more people if needed.

Recommendation: Adjust OKR 3.4 and Customer Support resourcing to accommodate these priorities.