

PLAN WITH PURPOSE

Project Clarity Worksheet

A successful project begins with a shared understanding of what it must accomplish. Use this worksheet to define the goals, priorities, requirements, and direction that should guide every decision before design begins.

THE CORE IDEA IS

Agree on what the project must achieve before design begins.

Work through the eight questions with everyone who has a say in the outcome. Disagreements found here are inexpensive; the same disagreements found during construction are not.

THE PURPOSE OF THIS WORKSHEET

The purpose of this worksheet is to surface the goals, constraints, and priorities a project must serve — so that design decisions, trade-offs, and scheduling all trace back to something the whole team already agreed on.

NAME

PROJECT

DATE

— DEFINE THE OUTCOME

Goals & Purpose

1 Primary Goal

What is the primary goal of this project?

Example: Create a client meeting space that feels professional, welcoming, and easy to use.

2 Operational Need

What business or operational need must the project support?

Example: Improve how customers move through the space while giving the team better access to storage and equipment.

3 Noticeable Improvement

What should be noticeably better when the project is complete?

Example: Fewer workflow interruptions, clearer organization, and a stronger customer experience.

— SET THE DIRECTION

Success & Priorities

4 Definition of Success

How will you know the project has succeeded?

Example: The space supports daily work, stays within budget, opens on schedule, and is well received by customers and staff.

5 Top Priorities

Which three priorities matter most?

Example: Function, schedule, and durability.

6 Trade-offs

Where are you willing — and unwilling — to make trade-offs?

Example: Finishes can change to protect the schedule, but accessibility and core functionality cannot.

— SET THE DIRECTION

Requirements & Direction

7 Requirements

What requirements must be captured before design begins?

Example: Capacity, equipment needs, accessibility, storage, technology, materials, budget, and timeline.

8 Team Direction

What clear direction should the entire team follow?

Example: Every decision should support an efficient, welcoming space that is durable, easy to maintain, and aligned with the budget.

✓ Project Direction

In one sentence, summarize what this project must achieve.

Ready to put this into motion

A clear brief is the strongest start a project can have — and you don't have to carry it forward alone. Visit nwcbuildlab.com/book to schedule a conversation about what you've written here.