

The project on one page

Project sheet, decision log, portfolio status, go or no-go: four tools to launch a project, follow it every week and decide on a cutover from written answers.

Who it is for

- SME and mid-sized company leaders who launch a project (new software, a move, a new offer) without a dedicated project team.
- Managers who follow several projects at once and want to see, in one line per project, which one is slipping.
- Anyone who has to say yes or no on cutover day, and put it in writing.

The problem it solves

A project rarely goes off track all at once. The objective was never given a number, the budget has no contingency line, three people think they are in charge, and the cutover date is set by the schedule rather than by the real state of things.

The module makes you write these points on one page and have it reviewed by the one who pays and the one who delivers. Then four signals are followed every week: progress, budget, major risks and deadlines. Decisions are logged with their reason. And the cutover is decided on five answers, 48 hours before.

In the module

- The Excel workbook “The project on one page”: six tabs, live formulas, a completed fictitious example.
- The one-page project sheet, to print and fill in by hand during the first meeting.
- This guide: each tab step by step, with screenshots, and the fictitious example explained figure by figure.
- A video of two to three minutes showing the completed workbook.

Contents

Before you start: the workbook in six tabs	p. 2
Step 1 · The project sheet	p. 3
Step 2 · The decision log	p. 5
Step 3 · The portfolio status	p. 6
Step 4 · The go or no-go	p. 7
The fictitious example, figure by figure	p. 8
What the tool does not do · The suggested routine	p. 10
Two rules to check · Sources · About the author	p. 11

This guide and the workbook are management tools, to be adapted to your project. Fictitious example: no figure comes from a real company. Free module, version 1.0, October 2026.

Before you start: the workbook in six tabs

The first tab, “How to use”, says what to fill in and in what order. The tabs follow that order.

The project on one page

Free module · Tudor Hilcu, by THG Conseil · thgconseil.fr

What to fill in, and in what order

1

“Project sheet”: at launch, fill in the five boxes, then have the sheet reviewed by the one who pays and the one who delivers. Allow an hour.

2

“Decision log”: for each decision, one line with the date, who decides, why and the deadline. Five minutes per decision.

3

“Portfolio status”: every week, one line per project (progress, budget, major risks, next deadline). The status calculates itself.

4

“Go or no-go”: 48 hours before a cutover, answer the five questions. Five yeses, you go; otherwise you postpone and tell your customers.

5

“Fictitious example”: a made-up project, filled in from start to finish, to see the result before you start.

Cells

Input cell: your text, dates, amounts; drop-down lists for answers and statuses.

Calculated cell: protected, it updates by itself.

Red

Alert: incomplete box, “postpone” verdict, “Red” status, overdue decision.

Good to know

•

The status thresholds can be changed at the top of the “Portfolio status” tab.

•

To add rows, unprotect the sheet (Review menu, Unprotect Sheet: there is no password), then check the formulas.

•

The step-by-step guide (PDF) explains each tab with screenshots, and walks through the fictitious example figure by figure.

An outside view

To frame a project, prepare a go or no-go or keep a portfolio status: call me or write to me. The first conversation is complimentary, within 48 hours.

thgconseil.fr/en/contact · +33 6 74 86 88 70 · contact@thgconseil.fr

Tudor Hilcu, founder and head of THG Conseil. PMP®, PRINCE2 Agile®, ITIL® 4. Module version 1.0, October 2026.

Screenshot: the “How to use” tab of the workbook.

Tab	When	Time
How to use	when you first open it	2 minutes
Project sheet	at launch, then whenever the date, budget or owner changes	1 hour, then 10 minutes
Decision log	for each decision	5 minutes per decision
Portfolio status	every week, on the same day	15 minutes for 5 to 10 projects
Go or no-go	48 hours before each cutover	30 minutes with the leads
Fictitious example	before you start	10 minutes of reading

Cells

Dark grey border, white background: input. Drop-down lists for answers, agreements and statuses.

Chalk background: calculated and protected. The cell updates by itself.

Red

Red text: alert. Incomplete box, “postpone” verdict, “Red” status, overdue decision.

Protection

Sheets are protected without a password, so that a formula is not deleted by mistake. To add rows: Review menu, Unprotect Sheet, then check the formulas of the new row. The workbook was checked in Microsoft Excel; another spreadsheet application may display the lists and colours differently.

1

The project sheet (boxes 1 to 3)

Step 1 · “Project sheet” tab · at launch · one hour, review included

A · Project sheet

Project

New sales management software (fictitious example)

Sheet drawn up on

05 Oct 2026

1

The objective, in one sentence, with a number

What will have changed, by how much, and by when.

1

Record every order and every invoice in the new software by 1 February 2027, and cut the time between delivery and invoice from 4 days to 1 day.

Check

Number included

2

2

The budget, with a line for contingencies

Contingency is a separate line, not a margin hidden in every item.

Budget, excluding contingency

3

180,000

Contingency

27,000

Total

4

207,000

13% contingency

Check

3

The date, and what happens if it slips

Write down what a month's delay costs: money, customers, a missed season.

Planned end date

01 Feb 2027

5

Time left

17 weeks

Check

If it slips by a month

6

Old software licence extended by three months: €4,500. After 15 March the busy season starts: no cutover before September.

Screenshot: “Fictitious example” tab, part A, laid out like the “Project sheet” tab.

- 1

Write the objective in one sentence, with a number: what will have changed, by how much, by when. “Improve invoicing” cannot be checked; “from 4 days to 1 day” can.
- 2

The check looks for a number in the sentence. If there is none, it shows “Add a number” in red.
- 3

Enter the budget excluding contingency, then the contingency on its own line. An empty or zero contingency line triggers the alert “Add a contingency line”.
- 4

The total and the share of contingency are calculated for you. You see straight away whether the margin is realistic for this kind of project.
- 5

Enter the planned end date. The time left, in weeks, is counted from the date of the sheet, top right.
- 6

Write down what happens if the date slips by a month: a cost, customers, a missed season. Without this line, the check for box 3 stays red.

Wording examples: an objective that cannot be checked, then the same one that can	
~~Modernise our sales management.~~	→ Record every order in the new software by 1 February 2027.
~~Improve invoicing.~~	→ Invoice one day after delivery instead of four, by the end of March.
~~Reduce stock-outs.~~	→ Fewer than ten stock-outs a month on the 200 best-selling items, from June.

1

The project sheet (boxes 4 and 5, review)

Step 1 · “Project sheet” tab · continued

4 The owner: one person only

A name, not a department or a committee.

Name	1 Claire	Role	Finance and administration director	Check	2
------	----------	------	-------------------------------------	-------	---

5 The three main risks, and the response to each

The risk: what could happen. The response: what you do before it happens.

No.	Risk	3	Response	4	Check
1	Item and customer data migration is incomplete: orders blocked on D-day.		Two trial migrations, in November and January; check of the 200 best-selling items.		
2	Sales staff are not trained in time: quotes redone by hand in February.		Training in December; two super-users per branch.		
3	The link with the carrier does not work: deliveries not triggered.		End-to-end test in January; delivery notes sent by email as a fallback.		

Review, before launch

If they disagree on a box, talk about it now, not after launch.

Reviewed by	Name	5	Date	Agreed?	Disagreement or reservation
The one who pays	Marc, managing director		07 Oct 2026	Yes	
The one who delivers	Julien, integrator's project manager		08 Oct 2026	Yes	Data must be supplied before 30 Nov 2026.

Boxes filled in

5 of 5

6

Where the sheet stands

Ready: reviewed and agreed by both

7

Screenshot: “Fictitious example” tab, part A, laid out like the “Project sheet” tab.

- One name for the owner, with their role next to it.
- If the name box contains “and”, a comma, “/” or “&”, the check asks you to keep only one name.
- The three main risks: what could happen, and what it would block.
- The response to each: what you do before it happens. A risk without a response shows “Response missing”.
- Have the sheet reviewed by the one who pays and the one who delivers: name, date, agreed or not, and any reservation.
- The counter shows how many of the five boxes are complete.
- The verdict: “Ready” when all five boxes are filled in and both reviewers said yes. “Disagreement”, in red, if one said no or had reservations: that is the time to talk, before launch.

TIP For the first meeting, print the one-page sheet that comes with the module and fill it in by hand with both reviewers. Then copy it into the workbook.

2

The decision log

Step 2 · “Decision log” tab · for each decision · five minutes

B · Decision log

Review date

29 Jan 2027

1

Used

29 Jan 2027

Leave blank: today's date is used.

Open decisions

6

3

Overdue

1

Review due

1

No.	Decision	Who decides	Date	Why	Deadline	Status	Review on	Alert	Follow-up
1	Choose integrator B for the new software	Management committee	12 Oct 2026	Offer €12,000 cheaper and three references in wholesale.	31 Oct 2026	Applied			Contract signed on 28 Oct 2026.
2	Keep the old software read-only for twelve months after cutover	Marc, managing director	09 Nov 2026	Find past orders and invoices. Accountant asked for advice on record keeping.	15 Feb 2027	In progress	26 Jan 2027	Review due	
3	Train two super-users per branch	Claire	07 Dec 2026	Sales staff hardly available in January.	15 Jan 2027	Applied			Six super-users trained.
4	Bring in a contractor for the data migration	Claire	11 Jan 2027	Item migration three weeks behind.	25 Jan 2027	In progress		Overdue	
5	Move cutover from 1 to 15 February and tell the five biggest customers	Marc, managing director	28 Jan 2027	Go or no-go of 28 Jan: question 3 unclear, stock in hand not confirmed by two customers.	15 Feb 2027	In progress	08 Feb 2027		Customers told on 28 Jan 2027.

Screenshot: “Fictitious example” tab, part B, laid out like the “Decision log” tab.

- The review date: the day you go through the log. Left blank, the workbook uses today's date.
- One line per decision: what is decided, who decides (a named person or body), the date.
- Why: the reason, in one or two sentences. It is the column people regret not filling in six months later.
- The deadline for putting it into effect and the status: to apply, in progress, applied, dropped. “Review on” is for decisions to be looked at again on a given date.
- The alert is calculated: “Overdue” if the deadline has passed and the decision is not applied yet; “Review due” if the review date has come.
- The counters sum up the log: open decisions, overdue, review due.

TIP Also log decisions not to do something: “we keep the current carrier” is a decision, with its reasons.

3

The portfolio status

Step 3 · “Portfolio status” tab · every week · fifteen minutes for five to ten projects

C · Portfolio status

Review date

29 Jan 2027

1

Used

29 Jan 2027

Leave blank: today's date is used.

Criterion	Amber from	2	Red from	How to read it
Progress behind plan (points)	5		15	Actual progress minus planned progress. Actual 50%, planned 60%: 10 points behind.
Budget overrun	5%		15%	Budget spent compared with the budget planned for the same date.
Open major risks	2		4	Risks that threaten the date or the budget and whose response is not in place.
Deadline overdue (days)	1		15	Days since the next deadline, when it has passed without being met.

A project's status is that of its worst criterion. Green: everything within thresholds. Amber: a gap, to watch closely. Red: a decision is needed.

Portfolio

7

Green

1

Amber

2

Red

2

To fill in

0

No.	Project	3	Owner	Planned progress	Actual progress	4	Budget planned to date	Budget spent	Budget gap	Open major risks	Next deadline	5	Why	6
1	New sales management software	Claire	90%	85%	-5	170,000	176,000	+4%	1	15 Feb 2027	Amber	progress		
2	Warehouse move	Karim	40%	22%	-18	60,000	58,500	-3%	3	15 Jan 2027	Red	progress, risks, deadline		
3	Online shop for tradespeople	Sophie	30%	32%	+2	25,000	30,000	+20%	0	31 Mar 2027	Red	budget		
4	Team leader training	Paul	60%	60%	0	8,000	7,600	-5%	0	12 Mar 2027	Green	Within thresholds		
5	New transport contract	Nadia	75%	72%	-3				2	05 Feb 2027	Amber	risks		

Screenshot: “Fictitious example” tab, part C, laid out like the “Portfolio status” tab.

- The review date (blank: today). Overdue deadlines are counted from it.
- The thresholds: the gap from which a criterion turns amber, then red. The workbook's values are a starting point; change them to suit your projects.
- One line per project: the owner, planned and actual progress, budget planned to date and spent, open major risks, the next deadline.
- The gaps are calculated: progress points (actual minus planned) and budget gap (spent compared with planned). The shaded or red cell shows the criterion that tips the status.
- A project's status is that of its worst criterion: green, amber or red. “To fill in” if the line only has a name.
- Why: the criteria outside the thresholds, so you know what to look at in the meeting.
- The portfolio: how many projects are green, amber or red.

TIP Estimate actual progress from finished deliverables, not from time spent. Otherwise the status stays green until the last moment.

4

The go or no-go

Step 4 · “Go or no-go” tab · 48 hours before cutover · thirty minutes with the leads

D · Go or no-go

Project

New sales management software (fictitious example)

Decision made by

Marc, managing director

Cutover date (D-day)

01 Feb 2027

Decide by (48 hours before)

30 Jan 2027

Decision made on

28 Jan 2027

No.	Question	Answer	Evidence, or what is missing	Who confirms it
1	Has the last full test run, from order to invoice, passed?	Yes	Full test run on 22 Jan: 40 orders, from entry to invoice.	Claire
2	Are the key people trained, and available on the day?	Yes	12 people trained; schedule for the week approved.	Branch managers
3	Do your biggest customers have stock in hand?	Unclear	Two of the five biggest customers have not confirmed their stock in hand.	Sales team
4	Is the rollback ready, and until when does it remain available?	Yes	Old software kept open for entry until 2 February, 12:00.	Integrator
5	Who can say stop?	Yes	Marc, on Claire's advice.	Marc

Rollback available until (date and time)

02 Feb 2027 12:00

The person who can say stop

Marc, managing director

Yes

4

No

0

Unclear

1

No answer

0

Verdict

Postpone the date and tell your customers

New cutover date

15 Feb 2027

Customers told on

28 Jan 2027

Screenshot: “Fictitious example” tab, part D, laid out like the “Go or no-go” tab.

- The cutover date, D-day.
- The decision deadline is calculated: two days before. A decision made later shows “Less than 48 hours before cutover”.
- Answer each question yes, no or unclear, from the list. An unclear answer counts as a no.
- For each answer, the evidence (a passed test, a signed list) or what is missing, and the person who confirms it.
- Until when the rollback remains available: a date and a time.
- The person who can say stop, named.
- The count of answers.
- The verdict: five yeses, you go. A single no or a single unclear answer, you postpone.
- If you postpone: the new date, and the day customers were told. Until that is done, the workbook reminds you.

The fictitious example, figure by figure (1 / 2)

An industrial supplies wholesaler, made up for the purpose, replaces its sales management software. Names, amounts and dates are fictitious. Here is where each figure shown in the “Fictitious example” tab comes from.

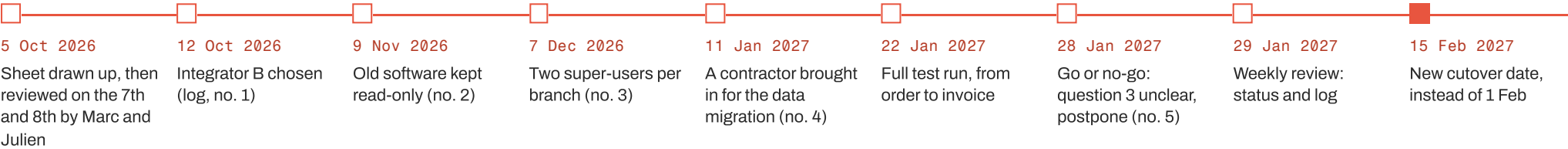
A · Project sheet

What is shown	Where it comes from
Number included	The objective contains “1 February 2027” and “from 4 days to 1 day”.
Total: 207,000	180,000 of budget plus 27,000 of contingency.
13% contingency	27,000 divided by 207,000: 13.04%, shown as 13%.
17 weeks	From 5 Oct 2026 (date of the sheet) to 1 Feb 2027 (planned end): 119 days, that is 17 full weeks.
Owner check empty	One name only: “Claire”. Her role is in the next box.
5 of 5	Objective, budget with contingency, date with what happens if it slips, owner, three risks with their three responses.
Ready	Marc, who pays, and Julien, who delivers, both answered “Yes”. Julien’s reservation is recorded without blocking.

D · Go or no-go

What is shown	Where it comes from
Decide by 30 Jan 2027	Cutover planned on 1 Feb 2027, minus two days.
No 48-hour alert	Decision made on 28 Jan 2027, before 30 Jan 2027.
4 yes, 1 unclear	Question 3: two of the five biggest customers have not confirmed their stock in hand.
Postpone	One unclear answer is enough. The rollback was ready until 2 Feb 2027 at 12:00, but it does not replace a customer without stock.
No “Tell your customers” reminder	New date 15 Feb 2027, customers told on 28 Jan 2027. The decision is in the log (no. 5).

Timeline of the fictitious example



The fictitious example, figure by figure (2 / 2)

C · Portfolio status (review date: 29 Jan 2027, workbook thresholds)

Project	Progress	Budget	Major risks	Deadline	Status
New sales management software	85 - 90 = -5 points: amber (threshold 5)	176,000 / 170,000 = +3.5%, below 5%	1, below 2	15 Feb 2027, ahead	Amber
Warehouse move	22 - 40 = -18 points: red (threshold 15)	58,500 / 60,000 = -2.5%	3: amber (threshold 2)	15 Jan 2027, 14 days overdue: amber	Red
Online shop for tradespeople	+2 points	30,000 / 25,000 = +20%: red (threshold 15%)	0	31 Mar 2027, ahead	Red
Team leader training	0 points	7,600 / 8,000 = -5%	0	12 Mar 2027, ahead	Green
New transport contract	-3 points, below 5	no budget entered: criterion ignored	2: amber	5 Feb 2027, ahead	Amber

Portfolio: 1 green, 2 amber, 2 red. The workbook shows +4% for the first project: rounding only affects the display, the comparison with the threshold uses +3.5%. The warehouse deadline would turn red on the 15th day overdue.

B · Decision log (review date: 29 Jan 2027)

What is shown	Where it comes from
3 open decisions	Nos. 2, 4 and 5 are “In progress”; nos. 1 and 3 are “Applied”.
1 overdue	No. 4: deadline 25 Jan 2027, before 29 Jan 2027, and not applied yet.
1 review due	No. 2: review planned on 26 Jan 2027, a date already passed.
No. 5 without alert	Deadline 15 Feb 2027 and review 8 Feb 2027: both after 29 Jan 2027.

How the status is calculated

Progress	Actual minus planned, in rounded points. A delay at least equal to the threshold gives amber, then red.
Budget	Spent divided by planned, minus 1. Planned budget blank or zero: the criterion is ignored.
Major risks	The number of open risks, compared with both thresholds.
Deadline	Days between the next deadline and the review date, when the deadline has passed.
Status	The worst of the four criteria. A name with no data at all: “To fill in”.

What the tool does not do

- It does not replace the detailed schedule, the task list or time tracking.
- It does not decide for you. The status and the verdict are calculated from what you enter; the decision remains with the owner and the one who pays.
- It does not check your figures. Progress estimated by guesswork gives a wrong status.
- It does not handle several people at once: one person keeps the file up to date, the others read it.
- It says nothing about your legal, tax or accounting obligations. For that, move forward with your lawyer and your accountant.
- It does not predict whether a project will succeed. It makes gaps visible earlier, while options remain.

Five traps to avoid

- 1 An objective with no number, or with five: keep the one that matters to the one who pays.
- 2 Contingency spread across every item: the day an unexpected cost must be paid, nobody knows where the margin is.
- 3 An owner called “the project team”: when everyone is in charge, nobody decides.
- 4 A status that stays green for months: check actual progress and the thresholds again.
- 5 A go decided on the morning itself: 48 hours ahead, there is still time to tell customers.

The suggested routine

When	What	Time
At launch	The project sheet, reviewed by the one who pays and the one who delivers	1 hour
For each decision	One line in the log, with the why	5 minutes
Every week, on the same day	The status of each project, then the alerts in the log	15 minutes for 5 to 10 projects
Whenever the date, budget or owner changes	The sheet updated and reviewed again	10 minutes
48 hours before a cutover	The go or no-go, with the leads	30 minutes
After the cutover	One line in the log: what was decided on D-day	5 minutes

TIP Before each review, save a dated copy of the workbook: you will keep the history of the status week after week.

Before changing your management software: two rules to check

The fictitious example is a change of management software. For a business established in France, two rules often affect this kind of project. Check how they apply to yours with your lawyer and your accountant.

Electronic invoicing (France)

Since 1 September 2026, all VAT-registered businesses established in France must be able to receive electronic invoices, through an approved platform. Large and mid-sized companies have issued their invoices in this form since the same date; SMEs and micro-businesses will do so from 1 September 2027. New software that issues invoices must allow for it: in the go or no-go, the “from order to invoice” test run includes sending through the platform.

French General Tax Code, article 289 bis; [service-public.gouv.fr](https://service-public.gouv.fr/economie.gouv.fr); economie.gouv.fr.

Keeping accounting records (France)

Accounting documents and supporting documents must be kept for ten years. Before switching off the old software, decide with your accountant how the history of invoices and entries will remain readable: an export, an archive, read-only access. In the fictitious example, this is decision no. 2 in the log.

French Commercial Code, article L123-22.

About the author

Tudor Hilcu founded THG Conseil in 2022 and runs it. He spent eight years running programmes, portfolios and budgets for major groups (assignments delivered for TotalEnergies, The Walt Disney Company, GRDF and Monoprix). PMP®, PRINCE2 Agile® and ITIL® 4 certifications.

Sources checked on 8 October 2026

Text	Site	Address
French Commercial Code, article L123-22 (version in force since 4 January 2003)	Légifrance	https://www.legifrance.gouv.fr/codes/article_lc/LEGIARTI000006219327/
French General Tax Code, article 289 bis (version in force since 21 February 2026)	Légifrance	https://www.legifrance.gouv.fr/codes/article_lc/LEGIARTI0000046195635
“Facturation électronique : c'est pour bientôt !”, published 19 January 2026, updated 27 February 2026 (in French)	Service Public Entreprendre	https://entreprendre.service-public.gouv.fr/actualites/A15683
“Tout savoir sur la facturation électronique pour les entreprises” (in French)	economie.gouv.fr	https://www.economie.gouv.fr/tout-savoir-sur-la-facturation-electronique-pour-les-entreprises

Texts change: check the version in force on the day you decide. Article 289 bis of the General Tax Code is due to be replaced, from 1 January 2027, by provisions of the Code des impositions sur les biens et services (Ordinance no. 2025-1247 of 17 December 2025).

An outside view

To frame a project, prepare a go or no-go or keep a portfolio status: call me or write to me. The first conversation is complimentary, within 48 hours.

thgconseil.fr/en/contact · +33 6 74 86 88 70 · contact@thgconseil.fr

This guide and the workbook are management tools, to be adapted to your project. Fictitious example: no figure comes from a real company. Free module, version 1.0, October 2026.