



PM Tools #2 - Quick Planner

Harnessing the Power of Simplicity with Excel timelines

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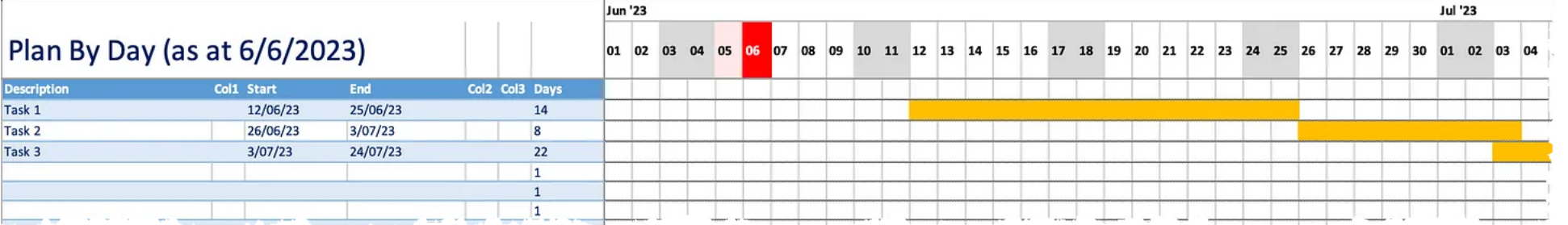
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[MS Project](#), [Monday](#), [BaseCamp](#), [LiquidPlanner](#) and other tools are excellent but sometimes you need something quick and easy to capture an idea and get a sense of sequence and timespans. Many of us have used Excel to paint a Gantt chart with cell shading. Several years ago, I wanted something a little more automated and came up with a workbook I dubbed *QuickPlanner*. It allows me to key in a list of items with start and end dates and have Excel plot them for me. I have found this little tool indispensable for all kinds of small tasks, such as visualising travel itineraries, team leave planning and, yes, even draft project plans that did eventually end up in Project Server.

The QuickPlanner is not a feature-rich planning tool – it has no sense of resource allocation or work breakdown structures. However, if you want something visual and quick, it could do the trick. Features include:

- Tabular data entry with extra columns for information
- Data entry sheet with timelines on a day scale
- Linked sheets for weekly and monthly scales
- Conditional formatting to draw Gantt bars
- Conditional formatting to show weekends and current date
- No macros or add-ins required: it uses built-in Excel functions
- Unlocked, flexible and customizable
- Prints out nicely



QuickPlanner data entry sheet showing Gantt bars on a daily scale

You can add formulas in the date columns to create dependencies between start and end dates for different tasks. The more adventurous could play with conditional formatting to get different coloured bars (the default is orange). Once, I entered values into the coloured cells and summed them underneath to get a ballpark estimate of effort over time. There is a Notes sheet in the workbook with some other helpful tips.

Conclusion

Sometimes you just want to draw a small Gantt chart or play around with some dates rather than use one of the professional planning tools. QuickPlanner is one way of doing that by tapping into the power of Excel. To explore the functionality of QuickPlanner, download it for free from my [GitHub](#). Please remember that this is an open tool, so go ahead and modify it to suit your needs. Let me know in the comments section if you found it useful.

As project managers, we employ various techniques and tools to streamline our work. While we are familiar with well-known resources like PRINCE2, PMBOK, SCRUM, SAFe, etc., our day-to-day activities often call for personalized planning, organization, documentation, review, problem-solving and communication. In this post series, I will share valuable tips and tools that have consistently proven effective throughout my career. I invite you to leave a comment, sharing your own experiences or suggestions, and contribute to the conversation.

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