

FREE PLANNING TEMPLATES

Wedding Planning Organization Pack

One clear place for decisions, tasks, roles, meetings, delegation, and the final handoff.

CLEAR · CURRENT · OWNED

A Small System, Not One Giant File

This pack organizes the work around your planning tools. It does not duplicate the detailed records that already belong in your budget, guest list, or vendor tracker.

ONE OFFICIAL HOME

Every type of information needs one current location. If a text message conflicts with the official record, the official record wins.

ONE VISIBLE OWNER

Shared access does not mean shared ambiguity. Every meaningful task, decision, and record needs one person accountable for keeping it current.

ONE REVIEW RHYTHM

Update information when it changes, then use a short weekly review to close open loops before they become urgent.

USE THIS PACK FOR

- ☐ Current priorities and open decisions
- ☐ Meetings and weekly reviews
- ☐ Tasks, owners, deadlines, and dependencies
- ☐ Delegation and decision authority
- ☐ Role division and communication
- ☐ Final-week handoff and stress reduction

KEEP THE SPECIALIZED RECORDS SEPARATE

Use your Budget Calculator for money, Guest List for guest data, and Vendor Tracker for vendor status. This pack points to those records and organizes the decisions and responsibilities around them.

OUR OFFICIAL PLANNING HUB IS

Map the Official Source of Truth

Before adding tasks, decide where each record lives, who maintains it, when it changes, and who needs access. A tool is only useful when its authority is explicit.

OFFICIAL SOURCE MAP

RECORD TYPE	OFFICIAL HOME	OWNER	UPDATE TRIGGER	ACCESS / BACKUP
Master task list			When status, owner, or deadline changes	
Decision log			When an approved answer changes	
Budget & payments			After any cost or payment change	
Guest record			When guest or RSVP data changes	
Vendor records			After a quote, contract, or scope change	
Calendar			Immediately after confirmation	
Contracts & files			When a current version arrives	
Final timeline			After an approved logistics change	

CONFLICT RULE

If sources disagree, the official home wins. Correct the duplicate and notify affected people.

ACCESS RULE

At least two appropriate people can reach the current plan. Protect passwords and private data separately.

LINK, DO NOT DUPLICATE

When information already has a current official home, link to it. Do not copy data into another tracker only to make the system look complete; duplicate records become competing records.

Wedding Planning Dashboard

Keep this page short enough to scan in one minute. It should show what needs attention now, not store every planning detail.

PRIORITY 1

PRIORITY 2

PRIORITY 3

Open decision	What is blocking it?	Owner	DECISION DEADLINE

NEXT DEADLINES

WAITING ON

SYSTEM CHECK

- ☐ Calendar current
- ☐ Decision log current
- ☐ Tasks assigned
- ☐ Files filed

A Folder Structure You Can Trust

The best structure is the one both partners can understand under pressure. Keep current files easy to identify and archive old versions instead of mixing them together.

Folder	Name	What belongs there
01	Venue & Contracts	Signed agreements, amendments, access rules
02	Admin & Legal	Licenses, insurance, permits, official records
03	Guests	Invitation files and exports from the current guest record
04	Vendors	One folder per vendor: proposal, contract, invoices, forms
05	Ceremony	Order, readings, music, participants, required items
06	Reception	Layout, menu, program, service and setup instructions
07	Attire	Orders, fittings, receipts, care and pickup details
08	Timeline & Logistics	Travel, deliveries, access, current timeline
09	Final Week	Only current documents needed for execution

FILE NAME RULE

Use vendor or topic + document type + date/version.

CURRENT VERSION

Mark one file clearly as current. Do not guess.

ARCHIVE RULE

Move superseded files out of the active folder.

A Focused Wedding Planning Agenda

Use a short, repeatable agenda so wedding planning does not enter every conversation. Twenty to thirty focused minutes is usually enough for a regular check-in.

MEETING DATE & TIME

NEXT MEETING

- 01

Open decisions
Review unresolved items before adding new topics.
- 02

Quick budget check
Notice drift; use the detailed budget record only if needed.
- 03

Vendor updates
Record information needed, follow-ups, and decisions.
- 04

Guest updates
Capture changes that affect invitations, meals, or logistics.
- 05

Tasks & owners
Assign every action an owner and a real deadline.

Outcome from this meeting	Owner	Deadline

Decision Log

Keep one unmistakable current answer. When a decision changes, mark the prior entry as superseded and record the new answer so the active plan stays clear without erasing history.

Topic	Final answer	Owner	Date	Who needs to know

A DECISION IS COMPLETE WHEN

The answer is recorded, the person responsible for follow-through is named, everyone affected knows, and any new task or deadline has been added to the correct place.

Action List: Owner, Deadline, Dependency

A task without an owner does not belong to everyone; it belongs to no one. Use this page for current actions, then move detailed work into the appropriate specialized tool.

Next action	Owner	Deadline	Depends on	Status

STATUS KEY

- ☐ Do now
- ☐ Scheduled
- ☐ Waiting
- ☐ Done

CHOOSE THE WORK THAT UNLOCKS OTHER WORK

Prioritize actions that close a blocking decision, protect a real deadline, or give another person what they need to continue.

Write a Complete Delegation Brief

Delegation works when the outcome, authority, information, timing, and limits are clear enough that the task can leave the couple's mental load.

TASK / OUTCOME

DELEGATE & CONTACT

DEADLINE

SCHEDULED CHECK-IN

INFORMATION & RESOURCES

BUDGET / BOUNDARIES

DECISION AUTHORITY

- ☐ Execute exactly as instructed
- ☐ Choose between approved options
- ☐ Make decisions within the stated boundary
- ☐ Pause and ask before any change

IF SOMETHING CHANGES, CONTACT

A REAL HANDOFF TRANSFERS ACTIVE OWNERSHIP

Delegation transfers the agreed work and monitoring, not every underlying obligation. The owner should escalate only exceptions outside the stated boundary.

Track the Work You Handed Off

Use this tracker for delegated tasks with a real deadline, budget, authority level, or meaningful cost of failure. Small favors do not need this much structure.

Task	Delegate	Authority	Deadline	Check-in	Status

LOW-COST BACKUP

IF THE TASK IS DROPPED

Wedding Planning Roles at a Glance

Separate ownership from support. The owner is accountable for the result; supporters provide information, labor, advice, or approval without creating a second chain of command.

Role	Owns	Supports	Should not own
Couple	Priorities, boundaries, major approvals	Each other's workstreams	Every wedding-day task
Families	Clearly agreed category or contribution	Traditions, guests, defined projects	Unassigned veto power
Wedding party	Only tasks explicitly accepted	Events, attire, practical help	Professional coordination by default
Planner	Contracted planning functions	Decisions, vendor process, logistics	Personal choices not delegated
Coordinator	Final logistics within scope	Timeline, vendors, day-of flow	Months of work outside contract
Venue lead	Venue operations and requirements	Access, setup, venue logistics	The entire wedding plan
Vendors	Contracted service and deliverables	Logistics affecting their work	Unrelated planning categories
Helpers	One assigned outcome	Pickup, setup, returns, assistance	Anything that comes up

THE RULE

Every meaningful responsibility needs one current owner, a defined result, and a clear point when ownership transfers.

Divide Work by Strength, Not Tradition

Choose one primary owner for each workstream. Shared approval can remain shared, but administrative follow-through should be visible.

Workstream	Primary owner	Support	Final approval	Next action
Venue & date				
Planning system				
Budget record				
Guest information				
Vendor communication				
Ceremony				
Reception logistics				
Attire & personal items				
Travel & transportation				
Final-week execution				

WORKLOAD CHECK

- ☐ Every workstream has one owner
- ☐ The split is sustainable
- ☐ Both partners can find current information
- ☐ No task still belongs vaguely to 'us'

Create a Clear Communication Chain

The goal is not hierarchy for its own sake. It is to stop the same question from reaching the couple through several people and to define who can answer operational questions.



Question type	Primary contact	Backup	Couple involvement
Vendor logistics			Only if needed
Guest questions			Only if needed
Wedding-party logistics			Only if needed
Venue access			Only if needed
Wedding-day changes			Only if needed

Keep the System Current

Use one short review to maintain accuracy and choose the next work. Do not reopen settled decisions without a real reason.

REVIEW THE SYSTEM

- ☐ What changed this week?
- ☐ Which decision is blocking other work?
- ☐ What is due in the next two weeks?
- ☐ Are any people waiting on us?

CLOSE OPEN LOOPS

- ☐ Did a contract or timeline detail change?
- ☐ Does any task lack an owner?
- ☐ Does any current file need to replace an old version?
- ☐ What can wait until a later review?

OUR THREE HIGHEST-PRIORITY ACTIONS

01

02

03

REVIEW COMPLETED BY

NEXT REVIEW

Final Handoff Checklist

By the final week, routine questions should move away from the couple. Transfer current information, exact responsibility, decision authority, and the moment the new owner takes over.

TRANSFER THE CURRENT PLAN

- ☐ Current master timeline distributed
- ☐ Vendor contacts and arrival details confirmed
- ☐ Venue access, setup, and end-time rules confirmed
- ☐ Final guest count and accessibility notes transferred
- ☐ Payment balances, tips, and proof of payment assigned
- ☐ Legal documents, rings, and personal items assigned

TRANSFER DAY-OF AUTHORITY

- ☐ Weather decision process confirmed
- ☐ Transportation contacts and pickup points confirmed
- ☐ Deliveries, pickups, and returns assigned
- ☐ Emergency contacts and kit assigned
- ☐ One wedding-day decision maker named
- ☐ Vendors know the day-of escalation path and when the couple must be involved

Responsibility	From	To	Takes over	Backup

Identify the Source Before Fixing It

Separate pressure into decisions, work, and uncertainty. Each type needs a different response: criteria, ownership, or a scheduled follow-up.

DECISION Needs criteria and a stopping rule.	WORK Needs a clear owner and deadline.	UNCERTAINTY Needs a follow-up date, not daily attention.
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Pressure / open loop	Type	Practical fix	Owner	Follow-up
	Decision / Work / Uncertainty			
	Decision / Work / Uncertainty			
	Decision / Work / Uncertainty			
	Decision / Work / Uncertainty			
	Decision / Work / Uncertainty			
	Decision / Work / Uncertainty			
	Decision / Work / Uncertainty			

USE THE SMALLEST EFFECTIVE FIX

Close the decision, assign the work, schedule the uncertainty, or remove the item. Do not create a larger system for a problem that needs one clear action.

Close, Simplify, Delegate, or Stop

When planning feels too heavy, reduce the amount of wedding being managed before demanding more efficiency from yourselves.

CLOSE

Which open decision can be completed now?

SIMPLIFY

Which choice could remove several dependencies?

DELEGATE

Which outcome can leave the couple's ownership?

STOP

Which optional item no longer earns its place?

FINAL-WEEK FREEZE

- | | |
|---|--|
| ☐ No new optional vendors | ☐ No major decor redesign |
| ☐ No reopening settled seating without cause | ☐ No new logistics without an owner |
| ☐ Use the current timeline | ☐ Change only to solve a real problem |

WHAT WE ARE INTENTIONALLY NO LONGER DOING

PROTECT WHAT MATTERS

Simplification should protect your main priorities, not cut randomly. Remove complexity where it buys real relief.

NOTES & LOOSE ENDS

Notes

Use this space for reminders, questions, and anything you want to revisit.