

FREE PLANNING WORKBOOK

Wedding Planning Tool & System Selector

Choose the smallest planning system that supports your real workflow - without duplicate records, locked-in data, or a second source of truth.

DEFINE • TEST • COMPARE • CHOOSE

Choose the System Before the Tools

Start with the work you need to manage. Then choose one primary system and only the support tools that solve a distinct job.

1 DEFINE

Mark which workflows are essential, useful, or unnecessary.

2 TEST

Run a small real-world test before importing months of wedding data.

3 COMMIT

Choose one master record for each type of information and document every handoff.

THE RULE THAT KEEPS THE SYSTEM CLEAN

ONE TYPE OF INFORMATION = ONE MASTER RECORD A paper copy, export, or vendor handoff may exist, but only one current version is authoritative.

OUR DECISION QUESTION

WHAT DO WE NEED OUR PLANNING SYSTEM TO DO?

Define Your Planning Workflow

Mark only what you genuinely need to control. An essential workflow should influence the system you choose; a useful workflow may live in a support tool.

Planning need	Essential	Useful	Not needed	What must it do?
Checklist	☐	☐	☐	
Budget	☐	☐	☐	
Guests	☐	☐	☐	
RSVPs	☐	☐	☐	
Seating	☐	☐	☐	
Vendors	☐	☐	☐	
Payments	☐	☐	☐	
Timeline	☐	☐	☐	
Inspiration	☐	☐	☐	
Communication	☐	☐	☐	
Documents	☐	☐	☐	

PRIMARY-SYSTEM FILTER

THE THREE WORKFLOWS OUR PRIMARY SYSTEM MUST HANDLE

Choose the Master System

Compare formats by the work they handle best. The right option reduces handoffs where information changes most often.

System	Best use	Changing data	Collab.	Search/formulas	Export/backup
Planning app	Mobile-first execution	Strong	Strong	Varies	Check export
Planning website	Connected online workflow	Strong	Strong	Varies	Check export
Spreadsheet	Structured live data	Strong	Strong*	Strong	Excellent
Digital planner	Reference + sections	Medium	Medium	Limited	Good
Paper binder	Meetings + reference	Weak	In person	Weak	Physical only
Hybrid	Live digital + selective paper	Strong	Strong	Strong	Strong if one master

*Collaboration depends on the spreadsheet platform, account structure, and permissions.

DECISION LENS

Do not choose by the longest feature list. Choose the system your real collaborators can update accurately, consistently, and securely.

Separate Execution from Inspiration

Ideas and logistics are both useful, but they belong to different workflows. Move inspiration into execution only after it becomes a real decision.

EXECUTION

Runs the wedding plan.

- ☐ Tasks and deadlines
- ☐ Guest list and RSVPs
- ☐ Budget and payments
- ☐ Seating
- ☐ Vendors
- ☐ Timeline
- ☐ Contracts and commitments

INSPIRATION

Develops the wedding direction.

- ☐ Color palette
- ☐ Flowers
- ☐ Attire
- ☐ Décor
- ☐ Stationery
- ☐ Ceremony ideas
- ☐ Reference images

HANDOFF RULE

When an idea becomes a decision, record it in the system that owns execution - not in multiple places.

Compare the Tools That Made Your Shortlist

Score two or three real options against your own must-haves. Record what you verified, not what a marketing page implies.

Feature	Must have?	Tool A	Tool B	Tool C
Checklist	☐			
Budget	☐			
Guest list / RSVPs	☐			
Seating	☐			
Vendors / payments	☐			
Collaboration	☐			
Mobile usability	☐			
Privacy / permissions	☐			
Export / backup	☐			
Support / longevity	☐			

SHORTLIST DECISION

Best overall fit: _____ Biggest unresolved risk: _____

Test Access Before You Trust the System

A tool can look complete and still fail when two people need to edit it or when guest information is harder to control than expected.

COLLABORATION TEST

- ☐ Separate accounts?
- ☐ Shared login required?
- ☐ Permission levels?
- ☐ Real-time updates?
- ☐ Mobile access?
- ☐ Partner can edit?
- ☐ Planner/helper can edit?
- ☐ Version conflicts?

PRIVACY & DATA CHECK

- ☐ What personal data is necessary?
- ☐ Who can see it?
- ☐ Guest information protected?
- ☐ Public/private controls?
- ☐ Can access be removed?
- ☐ What happens after the wedding?
- ☐ Two-factor authentication?
- ☐ Data deletion available?

DEAL BREAKER WE FOUND

Make Sure the Plan Can Leave the Platform

Your data will need to move to vendors, backups, another tool, or your archive. Test export before the platform becomes the only place the information lives.

Data / output	Available?	Format	Complete?	Tested?	Notes
Guest list	☐		☐	☐	
RSVP data	☐		☐	☐	
Budget	☐		☐	☐	
Vendor list	☐		☐	☐	
Seating	☐		☐	☐	
Contracts / files	☐		☐	☐	
CSV / XLSX	☐		☐	☐	
Printable version	☐		☐	☐	
Backup copy	☐		☐	☐	
Reusable elsewhere?	☐		☐	☐	

PORTABILITY RULE

If an essential data set cannot be exported, document how you would recover it before committing to the tool.

Test the Workflow Before You Commit

Use sample data, not your full wedding. A short test exposes friction before the system contains months of work.

Test step	Passed	Friction	Deal breaker	Notes
Create five sample guests	☐	☐	☐	
Include a household + plus-one	☐	☐	☐	
Record one RSVP	☐	☐	☐	
Create one budget entry	☐	☐	☐	
Add one vendor and payment	☐	☐	☐	
Invite a collaborator	☐	☐	☐	
Try seating if needed	☐	☐	☐	
Find and open an export	☐	☐	☐	
Restore from a backup	☐	☐	☐	

RESULT

Would we trust this tool as the master system? ☐ Yes ☐ Maybe ☐ No Reason:

Build a Small Planning Stack

Use the fewest tools that cover the work well. Every support tool needs a distinct job, a clear owner, and an explicit handoff.

Planning need	Tool chosen	Master or support?	Who updates it?

SYSTEM RULE

ONE TYPE OF INFORMATION = ONE MASTER RECORD If two tools store the same live data, name which one is authoritative and how updates return to it.

Map What Lives Where

Paper can support meetings, annotation, and handoffs. Changing data should stay in the master system so a printed copy never becomes a competing version.

Information	Digital master	Paper working copy	Both, one master	Reason / rule
Budget	☐	☐	☐	
Guests / RSVPs	☐	☐	☐	
Contracts	☐	☐	☐	
Inspiration	☐	☐	☐	
Meeting notes	☐	☐	☐	
Timeline	☐	☐	☐	
Vendor contacts	☐	☐	☐	
Final-week packet	☐	☐	☐	

HYBRID RULE

Paper is a working layer. If a handwritten change affects live data, transfer it back to the digital master and date the update.

Record the System You Are Choosing

Write down the decision so everyone knows where the current version lives, which tools support it, and what must never be duplicated.

PRIMARY PLANNING SYSTEM

SPECIALIZED TOOL #1

SPECIALIZED TOOL #2

PAPER COMPONENTS

MASTER FILE / ACCOUNT LOCATION

BACKUP LOCATION

WHO MAINTAINS THE MASTER

EXPORT / BACKUP SCHEDULE

WHAT WE DELIBERATELY WILL NOT DUPLICATE

NOTES & LOOSE ENDS

Notes

Use this space for reminders, questions, comparison findings, and anything you want to revisit before choosing your planning system.