02

PLANCRAFT USER GUIDE

Your Plan

Build, review, edit, protect, share, and export your PlanCraft plan.

Open and understand your plan

1. Log in and choose My Plans.
2. Select the plan you want to open.
3. Start with the Executive Summary, then review each section for accuracy and clarity.
4. Use the available editing controls to improve the plan as your thinking evolves.
5. Use sharing, comments, versions, PDF, or print when you are ready to collaborate or distribute it.

Core tools in Plan Viewer

Edit Update plan content instead of treating the first version as permanent.	**Versions** Use plan evolution history to preserve and review meaningful changes over time.
Comments Use comments to gather feedback from people who have appropriate access.	**Share** Invite collaboration or provide plan access using the available sharing controls.
PDF and print Create a portable copy for review, presentation, or offline use.	**Status and protection** Use status, password protection, locking, archiving, or deletion according to your needs.

A strong review sequence

- Confirm the problem, audience, and value proposition agree with one another.
- Check that goals are specific enough to become actions and deadlines.
- Remove assumptions that are presented as facts but have not yet been tested.
- Ask a trusted reviewer to comment on gaps, contradictions, and unclear language.
- Create a new version when the business direction changes materially.

Protecting the right plan

Before major changes	Confirm the plan title and owner, especially if you manage more than one plan. Use versions for significant revisions and archive plans you no longer actively use.

When sharing

Share only with people who should see the plan. If a plan contains confidential operating, customer, or financial information, use the available access and password controls rather than distributing an unrestricted copy.