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THE BIM MANAGER SURVIVAL GUIDE · EPISODE 1

DEFINE. AGREE. RELAX.

The Master Information Delivery Plan, agreed once and then automated -
connected across your CDE network, chasing the files and moving the dashboards by itself.

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A spreadsheet remembers the plan. Plannerly runs it.

That's the whole difference - and that's what we're going to show you today,

on one real project, start to finish.

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LET'S BE HONEST

Nobody becomes a BIM manager to chase files

You took this job to make project information flow - the right information, from the right people, at the right time. **That's the whole point of an MIDP.**

Somewhere around week three, you became the project's reminder system instead.

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ISO 19650 ASKS FOR ONE THING

Every task team's plan. Combined.

Each team writes their TIDP. Together they become the MIDP.

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AND WHAT'S THE END RESULT?

A spreadsheet.

You start from a template, you fill it in, and that's what you're left holding.

That's the toolkit for the most important coordination document on the project.

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And then it grew

MIDP

Master Information Delivery Plan

4,200 rows

MIDP_FINAL_final_v14.xlsx

#	Deliverable	Team	Status
4189	Floor plans — Zone 70	Architecture	Pending
4190	Building sections — Zone 70	Structure	Pending
4191	Room data sheets — Zone 70	MEP	Pending
4192	Coordination model — Zone 70	Architecture	Pending
4193	Equipment schedule — Zone 70	Structure	Pending
4194	Design report — Zone 70	MEP	Pending
4195	Floor plans — Zone 70	Architecture	Pending
4196	Building sections — Zone 70	Structure	Pending
4197	Room data sheets — Zone 70	MEP	Pending
4198	Coordination model — Zone 70	Architecture	Pending
4199	Equipment schedule — Zone 70	Structure	Pending
4200	Design report — Zone 70	MEP	Pending

MIDP

"Just one more deliverable..."



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The Spreadsheet

Last meaningful update: week three.

Current whereabouts: MIDP_v14_FINAL_final(2).xlsx - location disputed.

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WHAT ACTUALLY HAPPENS

Put a responsibility in a spreadsheet and it goes there to die.

Put a required delivery date in one, and that's the death of a delivery.

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CLEVER PEOPLE HAVE TRIED

Put it online

Collaborative, editable, better buy-in - and still unmanageable

Build a database

Requirements stored properly. Genuinely pioneering, and genuinely complex

Spreadsheet spaghetti

Sheets wired to sheets, wired to more sheets

THE OTHER HALF OF THE JOB

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So you become the reminder system

Me reminding the team about the deliverables they promised yesterday.



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THE IMPACT

Found missing at handover

The most expensive moment on the project to discover a gap

"Who agreed to this?"

Nobody did, it turns out

Files everywhere

Five platforms and an inbox - none of them the right one

And then there's you

Personally holding the whole thing together by remembering it

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SO, TODAY

We're retiring the deliverables spreadsheet

LIVE DEMO · AND YOU CAN START DOING THIS FOR FREE

Our survival plan

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Four steps. How it works, and how you build it.

1 **Define what's required**

Every requirement list you already have, pasted in and combined into one

2 **Agree it together**

Build Scope, then agree who delivers what and when - with RACI on every deliverable

3 **Turn it into the contract**

The plan becomes the contract document - signed, locked, on the record

4 **Let the plan do the chasing**

Connected tools, reminders, automatic dashboards, auto-shared reports - the plan runs itself

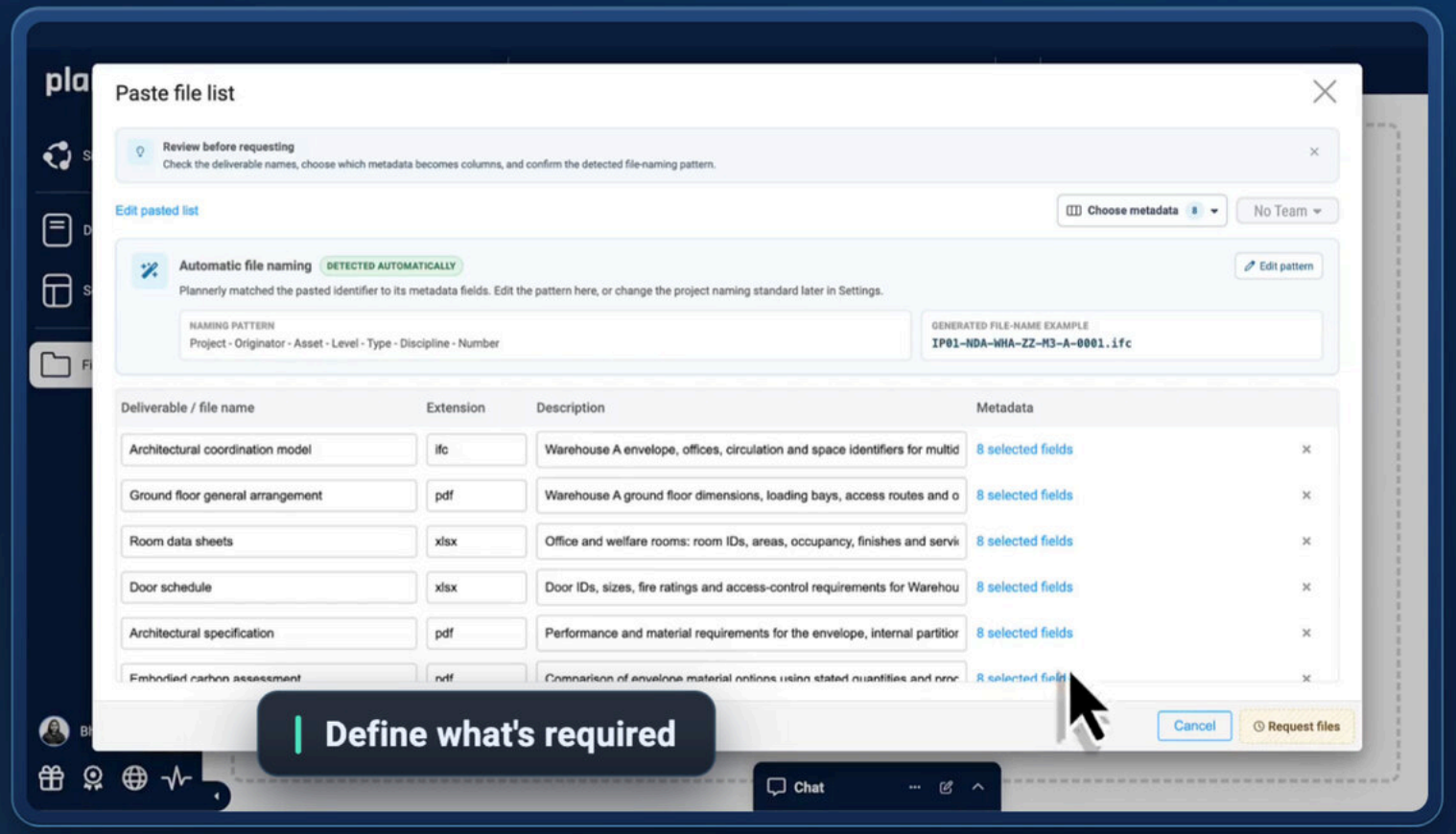
STAY TO THE END FOR… PASTE A LIST. GET THE FILES. CDE CONNECT

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Define what's required

If it isn't written down, it isn't agreed.

- **Copy and paste from anywhere** - drawing registers, emails, spreadsheets, Word documents
- **Every list combines automatically** - one set of required files, not seven competing ones
- **Your container naming is read, not retyped** - where the names carry structure, Plannerly picks it up
- **Every list levels up** - the weakest register comes up to the standard of the best one



WE'RE ALL EARS

Where do your requirements live right now? Registers, emails, sheets - name them all.

Our survival plan

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Up next: **Agree it together** · 1 down, 3 to go.

✓ Define what's required

2 **Agree it together**

Build Scope, then agree who delivers what and when - with RACI on every deliverable

3 Turn it into the contract

4 Let the plan do the chasing

STAY TO THE END FOR… PASTE A LIST. GET THE FILES. CDE CONNECT

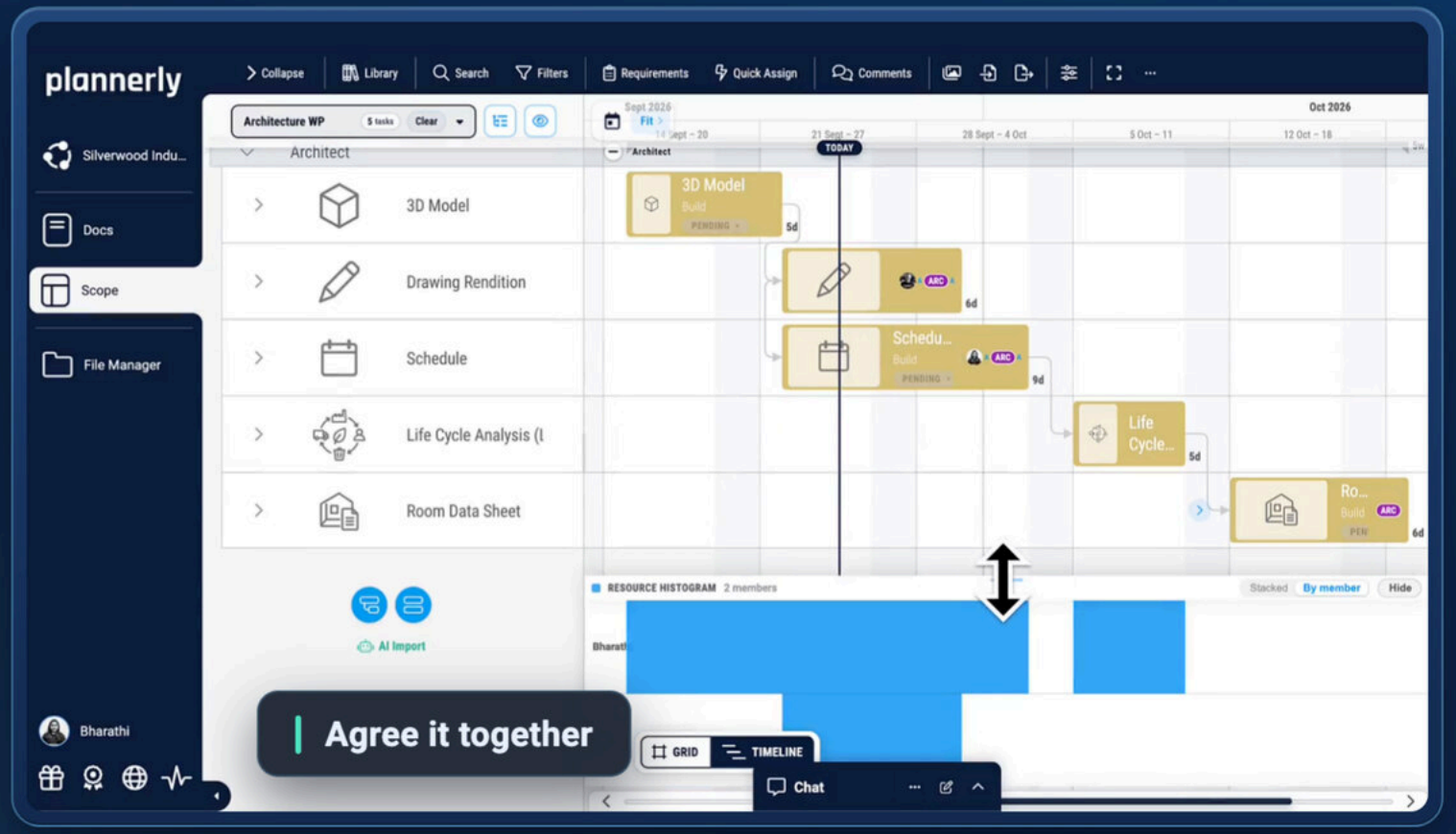
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Agree it together

"The architect will handle it" is not an owner. And silence is not agreement.

- **Build Scope does the heavy lifting** - your imported lists, grouped into a real management plan
- **Set who delivers what, and when** - visually, in minutes, not in a series of meetings
- **Handoffs, deadlines, prerequisites** - predecessors and successors that actually hold
- **RACI on the deliverable itself** - responsible, accountable, consulted, informed
- **Agreed on the timeline** - not in a spreadsheet, where it would go to die



WE'RE ALL EARS

Be honest - how much of your plan has an actual named human on it?

Our survival plan

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Up next: **Turn it into the contract** · 2 down, 2 to go.

✓ Define what's required

✓ Agree it together

3 **Turn it into the contract**

The plan becomes the contract document - signed, locked, on the record

4 Let the plan do the chasing

STAY TO THE END FOR… PASTE A LIST. GET THE FILES. CDE CONNECT

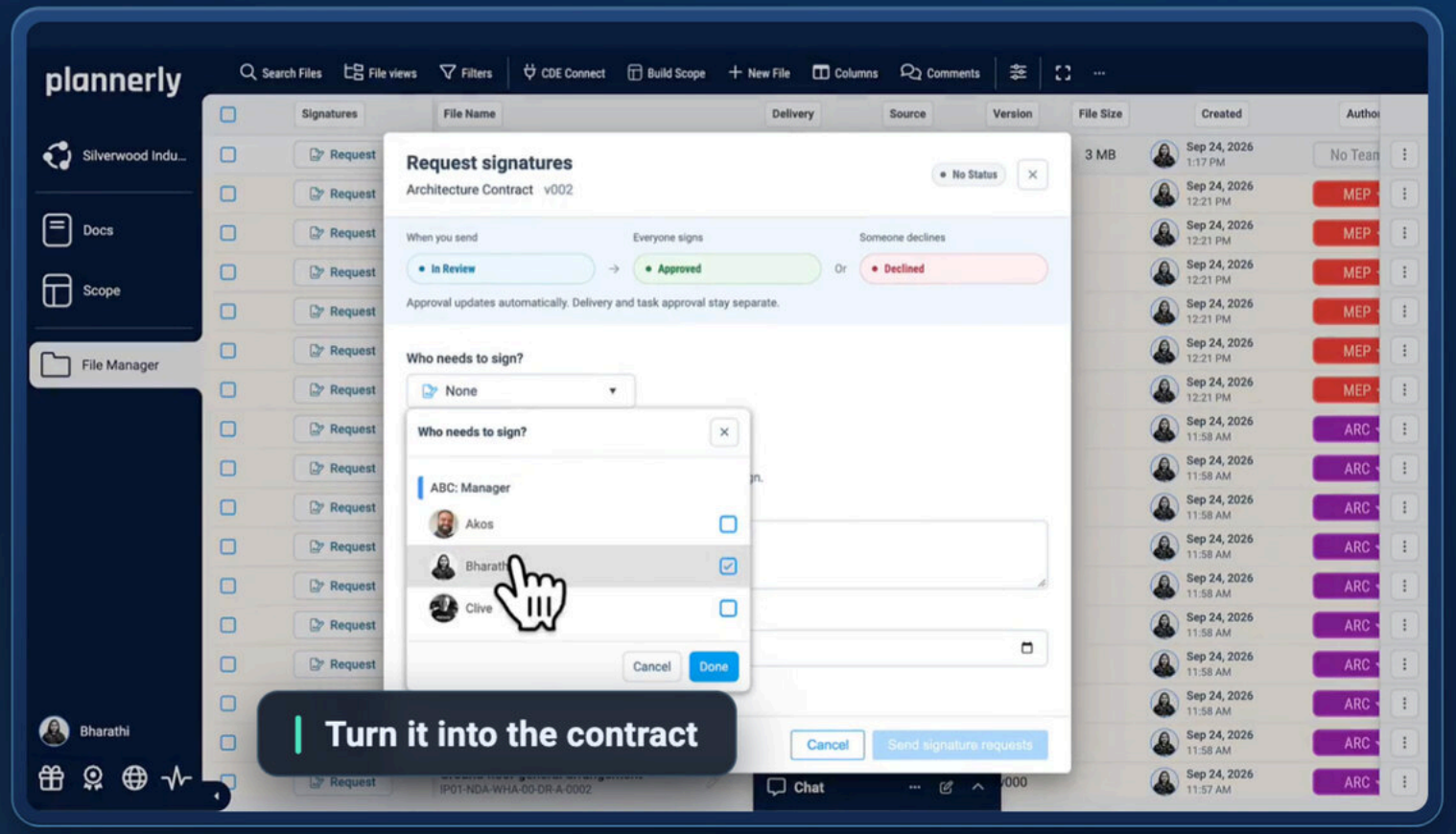
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Turn it into the contract

The plan people signed beats the plan people saw

- **The contract document is generated from the plan itself** - no re-typing, no drift
- **Every required file, in one document** - what's due, from whom, by when
- **E-signatures built in** - review, sign, done
- **Signed and locked** - with the full audit trail: who requested, who agreed, and when



WE'RE ALL EARS

How do you record what was agreed - email, minutes, or hope?

Our survival plan

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Up next: **Let the plan do the chasing** · 3 down, 1 to go.

- ✓ Define what's required
- ✓ Agree it together
- ✓ Turn it into the contract
- 4 **Let the plan do the chasing**
  Connected tools, reminders, automatic dashboards, auto-shared reports - the plan runs itself

STAY TO THE END FOR… PASTE A LIST. GET THE FILES. CDE CONNECT

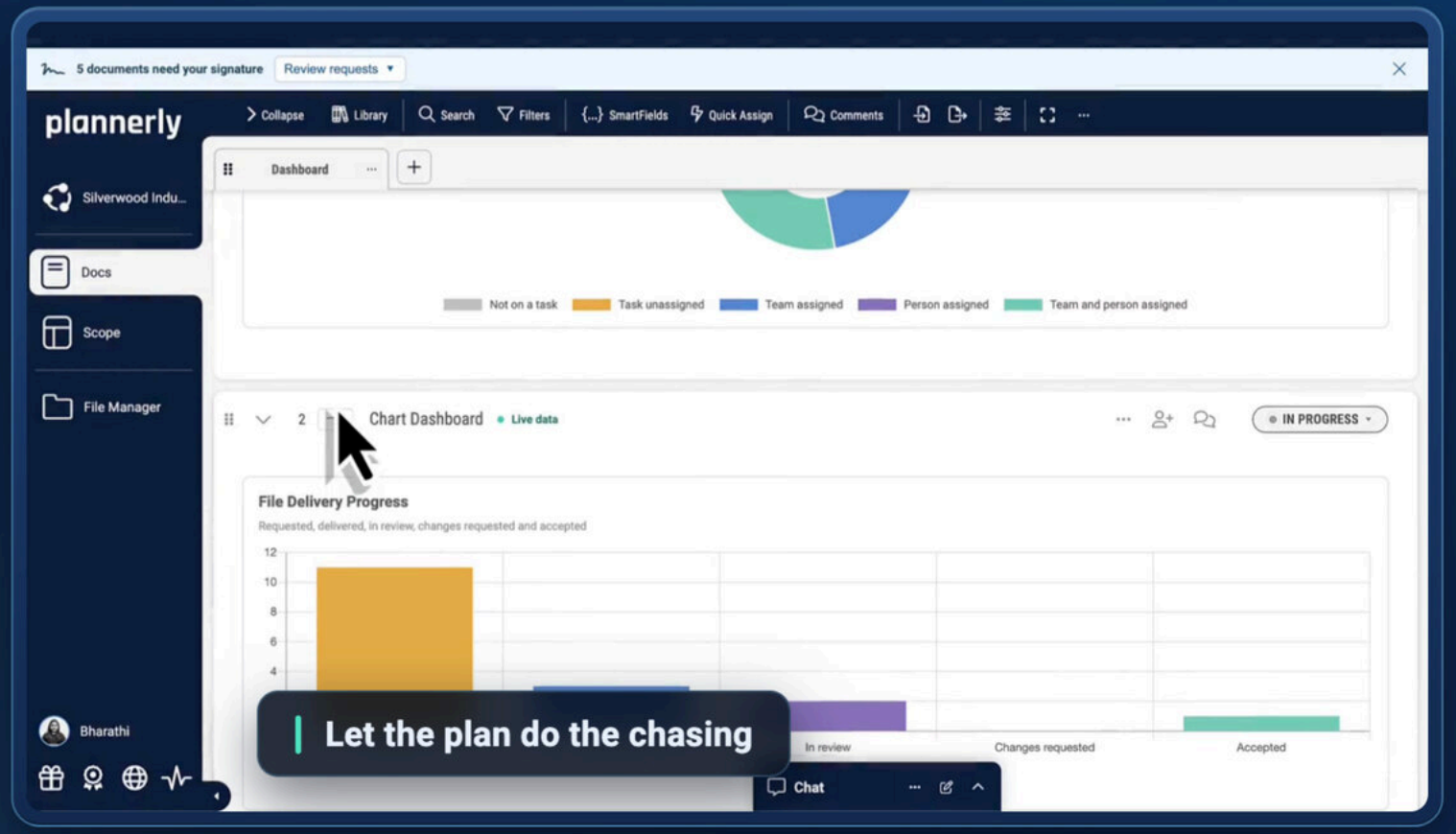
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Let the plan do the chasing

You manage the information - the plan does the chasing and the reporting

- **Connected to the tools your teams already use** - delivered files check themselves off, nobody re-uploads anything
- **Deadline emails + recurring reminders** - Plannerly nags, so you don't have to
- **Behind-schedule flags** - who's late, before it becomes a crisis
- **Dashboards build themselves** - progress reported automatically, not assembled on a Friday afternoon
- **Reports share themselves too** - scheduled straight to the client and the team



WE'RE ALL EARS

How many hours a week do you spend chasing files?

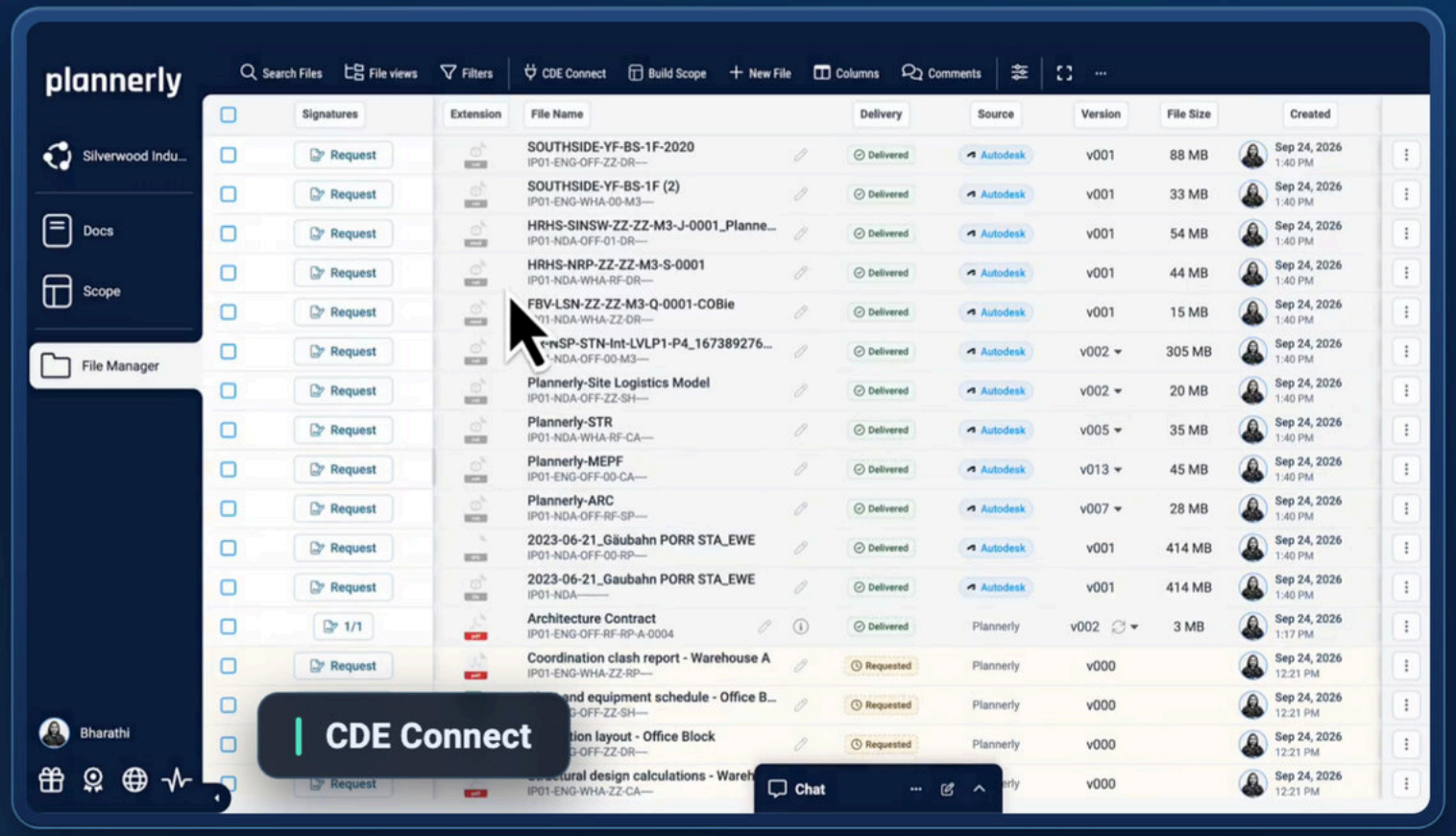
PREVIEWING TODAY · NEVER SHOWN PUBLICLY BEFORE

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CDE Connect

Or your CDEs, plural - because most projects quietly end up with more than one.

- **ACC, SharePoint, Procore** - wherever your teams already work
- **Delivered files check themselves off** against the agreement, the contract and the plan
- **Nobody re-uploads anything** - no finding, no sending, no "did you get it?"
- **Progress dashboards move on their own** - connected end to end
- Arrives with the **all-new File Manager** and **SmartFolder Sets**



WE'RE ALL EARS

Which CDE should we connect to first? Type it in the chat - we're reading.

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THE DIFFERENCE

A spreadsheet remembers the plan. Plannerly runs it.

Requirements, owners, agreement, contracts, files, reminders, dashboards - one place, one live version.

You manage the information. The plan manages the chasing.

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MORE PRODUCT UPDATES

- **Scope is up to 12x faster** - you'll feel it within a minute
- **Complete PDF packages, built visually** - docs, grids, timelines and Verify reports in one issue
- **Smarter AI imports** - messy spreadsheet in, approved plan out
- **Deliverables that look the part** - company-wide covers, headers, styles
- **View, Edit and Delete are separate permissions** now - plus Role Previews

Everything we ship, as we ship it: **app.plannerly.com/changelog**

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NEXT TIME ON THE SURVIVAL GUIDE

Surviving the RACI

The least useful page in most BEPs - a matrix nobody opens after week one.

We're turning it into the most useful thing on the project. You're already registered.

THU, OCT 8 · SAME TIME, SAME LINK

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THANK YOU

DEFINE. AGREE. RELAX.

Every step's full walkthrough - free: **plannerly.com/training**

Everything we ship, as we ship it: **app.plannerly.com/changelog**

Episode 2 - Surviving the RACI: **Thu, Oct 8 - you're already registered**