PROJECT PLANNING WORKSHEET

Bulk pouch approval worksheet

Use this fillable worksheet to organize the decisions, owners and evidence your team needs before releasing a bulk pouch order.

Save this PDF and come back to it

Type directly into the fields, select the checkboxes and save the PDF in a compatible PDF reader. This file is designed for work that may take more than one session.

How to use the worksheet

1. **Assign an owner**
   Name the person responsible for each decision.
2. **Record the evidence**
   Capture the approved choice, test result, file or exception.
3. **Mark the status**
   Select Approved, Follow-up needed, or both when approval has a condition.
4. **Finish the handoff**
   Use the last page to record outstanding work and final release approval.

PROJECT OR BRAND

TARGET ORDER DATE

PRIMARY ORDER OWNER

WORKSHEET VERSION / DATE

1 Order scope and final owner

Confirm the SKUs, pouch format, quantity, schedule and person who can release the order.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

2 Pouch format and use cycle

Record stand-up or flat format, opening method, reclosure needs and expected customer use.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

3 Filled pouch size

Record measured fill volume, product dimensions, headspace and the physical sample used for sizing.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

4 Materials and finishes

Record product needs, appearance, storage and shelf-life targets, plus documents your team needs reviewed.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

5 Filling and sealing process

Describe equipment, product conditions, seal-area risks and where production approval is stored.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

6 Artwork and labeling

Record the final template, SKU copy, artwork version, approval date and barcode review result.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

7 Finished-pouch test

Record the sample, test date, result and corrections made with the actual product and process.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

8 Quantity by SKU

Reconcile every SKU and artwork version across the quote, purchase order and artwork approval.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

9 Case packing, storage and receiving

Record case identification, destination, receiving contact, storage plan and incoming inspection.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

10 Signed approval packet

Reference the quote, purchase order, final artwork, pouch details, test evidence, names and dates.

DECISION OR REQUIREMENT TO RECORD

ASSIGNED OWNER

CHECK ALL THAT APPLY

☐ Approved ☐ Follow-up needed

OPEN ISSUES, EVIDENCE OR NOTES

FINAL HANDOFF

Outstanding work and release approval

Use this page to capture what remains open, who owns the next action and the condition that must be met before release.

ISSUE OR DECISION STILL NEEDED

OWNER OF THE NEXT ACTION

DECISION DEADLINE

RELEASE CONDITION OR EXCEPTION

Final owner authorization

The final owner confirms that required evidence and exceptions have been reviewed.

☐ Approved for release

FINAL OWNER NAME

DATE