

ECP Quick Guide: Working with Key Milestones

How to identify, track and manage the dates that matter most to your event.

Purpose: Key Milestones gives you a focused view of the dates that could materially affect the event, create a financial consequence, or affect a major commitment.

Critical Path vs. Key Milestones

Critical Path is the central planning control document. It tracks the work: tasks, due dates, owners, status, dependencies, supporting resources and notes. **Key Milestones** is a smaller management view of the dates that matter most to the event.

Critical Path	Key Milestones
Tracks planning tasks and deliverables.	Tracks a limited number of critical dates.
Contains operational detail across workstreams.	Highlights dates with significant event, financial or commitment impact.
Updated throughout planning.	Updated as critical dates become known or change.

What belongs in Key Milestones?

Use this test: If we miss this date, could it materially affect the event, create a financial consequence, or affect a major commitment? If yes, consider adding it to Key Milestones.

Typical examples include the event date, venue deposit and final payment dates, venue cancellation or attrition deadlines, room block cut-off, final guarantee, major supplier deposits or final payments, and a registration cut-off when it is a true operational deadline.

When contracts are finalized

Some milestone dates will not be available at the beginning of planning. Venue and supplier contracts often establish deposits, final payments, cancellation terms, room block cut-offs and other deadlines. When a contract creates an important deadline, add a specific task to the Critical Path and decide whether the date also belongs in Key Milestones.

Adding or renaming a milestone

The starter milestones are meant to be adapted. For example, rename **Major Supplier Deposit Due** to **AV Supplier Deposit Due** when AV is the supplier whose deadline you need to track. Add, delete or rename rows so the sheet reflects your event.

Updating milestone dates

Key Milestones can be maintained manually. When a critical date changes, update the Target Date and keep any corresponding Critical Path task consistent. This keeps the planner in control of the workbook.

Optional: link a milestone to the Critical Path

If you prefer, you can link a milestone Target Date to the corresponding Due Date in the Critical Path. In the Key Milestones Target Date cell, enter a formula such as:

= 'Critical Path' !C35

Replace **C35** with the cell containing the applicable Critical Path due date. The milestone date will then update when that Critical Path date changes.

Important: Only link a milestone after the corresponding Critical Path task has been established. If Critical Path tasks or rows are moved or deleted, confirm that the formula still points to the correct date.

Worked example: AV supplier deposit

1	The AV supplier contract is finalized.
2	The contract confirms an AV deposit deadline.
3	Add or update AV Supplier Deposit Due in the Critical Path with the applicable due date.
4	Decide that the deposit is significant enough to appear in Key Milestones.
5	Rename Major Supplier Deposit Due to AV Supplier Deposit Due . Enter the date manually or optionally link it to the Critical Path.
6	Verify the date and continue to update it if the contract or planning requirements change.

Contract finalized -> identify important deadline -> add/update Critical Path -> decide whether it belongs in Key Milestones -> enter manually or link it -> planner verifies.

ECP principle: The toolkit works completely on its own. AI is optional assistance, not required functionality. The planner reviews, verifies and decides what belongs in the final planning documents.