Review Plan Usage

September 11, 2026

Review Plan Usage

Use the review workspace to examine plan usage alongside operational requirements before publishing a version. This review helps you confirm that the plan is complete, understandable, and ready for the next decision or release step.

Overview

The **Review Summary** workspace brings the plan together for a final review. You can use it to assess the plan at a glance, including content related to billing, commercial readiness, monitoring, audit requirements, operational risks, and implementation activities.

Review the plan when you need to verify that planned usage remains appropriate for the organization's capacity and operating model. For example, the plan may include sections such as **Billing**, **Commercial Readiness — Stripe, credits, plans, enterprise**, 📊 **Monitoring & Audit**, and **Compounding operational risks**. These entries help you identify whether operational responsibilities, monitoring expectations, and commercial considerations have been addressed.

The review workspace also includes preview controls. Use **Preview** or **Share Preview Link** when you need to see how the plan will be presented or provide a viewable version to other stakeholders. When the plan is ready, use **Review & Publish** to proceed with publication.

> 📷 *Screenshot pending: The Review Summary workspace showing plan sections and the Review & Publish action.*

Prerequisites

Before reviewing plan usage, make sure you have:

- Access to the relevant project version and its review workspace.

- A plan version that contains the usage, billing, and operational information you need to assess.
- Permission to review or publish the version, if you need to use **Review & Publish**.
- The expected plan capacity, commercial requirements, and operational requirements from your organization.
- Stakeholder input for areas such as billing, credits, enterprise readiness, monitoring, and audit controls.

Step-by-Step Instructions

1. Open the project version you want to review.
2. Open the **Review Summary** area for that version.
3. Locate the section titled **The whole plan at a glance**.
4. Read the plan overview to understand the planned scope before assessing individual usage and operational items.
5. Select or review the **Billing** section.
6. Compare the billing-related plan details with your organization’s expected plan capacity and usage model.
7. Select or review **Commercial Readiness — Stripe, credits, plans, enterprise**.
8. Confirm that the plan addresses the commercial requirements that apply to your organization, such as credits, plan handling, or enterprise readiness.
9. Select or review 📊 **Monitoring & Audit**.
10. Verify that the plan identifies how usage and operational activity will be monitored and audited.
11. Select or review **Compounding operational risks**.
12. Identify risks that could increase as usage grows, such as additional review effort, monitoring needs, or dependencies across operational teams.
13. Select or review **Implementation Plan**.
14. Confirm that the implementation activities support the capacity and operational requirements identified during your review.
15. Select or review **UX priorities (feeds the ★ plan)** when user experience priorities affect how users will consume or manage the plan.

16. Review **Phase plan to perfect it — across all three surfaces** if the plan is being delivered in phases across multiple user experiences or operational surfaces.
17. Click **Preview** to inspect the plan in preview mode.

> 📷 *Screenshot pending: The Preview control and preview mode used to inspect the plan before publication.*

18. Review the previewed content for missing usage assumptions, unclear operational requirements, or incomplete billing information.
19. Click **Share Preview Link** when you need to send the preview to stakeholders for feedback.
20. Click **Back to Review** after previewing if you need to return to the review workspace.
21. Click **Review & Publish** when the usage, capacity, commercial, and operational requirements have been reviewed and approved for publication.

Tips and Best Practices

- Review usage together with operational requirements. A plan can appear complete from a billing perspective while still lacking monitoring, audit, or risk-management details.
- Start with **The whole plan at a glance** before reading individual sections. This gives you the context needed to judge whether a requirement belongs in the current plan or should be handled in a later phase.
- Treat **Commercial Readiness — Stripe, credits, plans, enterprise** as a cross-functional review area. You may need input from billing, finance, customer operations, and enterprise stakeholders before confirming readiness.
- Use 📊 **Monitoring & Audit** to verify that the plan accounts for ongoing operational visibility, not only initial implementation. Capacity and usage decisions are easier to manage when monitoring expectations are explicit.
- Pay close attention to **Compounding operational risks**. Small manual processes or unclear ownership can become significant issues as plan usage increases.
- Use **Preview** before sharing or publishing. Previewing helps you catch formatting, wording, and completeness issues in the version that stakeholders will see.

- Use **Share Preview Link** for feedback before selecting **Review & Publish**. This gives reviewers an opportunity to validate requirements without changing the plan directly.
- If the plan includes phased delivery, use **Phase plan to perfect it — across all three surfaces** to distinguish immediate operational requirements from improvements planned for later phases.

Related Pages

- Review and Publish a Plan
- Share a Plan Preview
- Manage Billing Plans
- Define Commercial Readiness Requirements
- Set Up Monitoring and Audit Requirements
- Review Implementation Plans

Troubleshooting

You cannot find the usage or capacity information you need

Review the plan sections most likely to contain supporting details, including **Billing**, **Commercial Readiness — Stripe, credits, plans, enterprise**, and **Implementation Plan**. If the required assumptions are not present, return to the plan review process and request that the plan owner add or clarify them before publication.

The plan has operational risks but no clear mitigation

Review **Compounding operational risks** together with 📊 **Monitoring & Audit**. Identify the missing owner, monitoring activity, audit expectation, or implementation task, then have the plan updated before you select **Review & Publish**.

Stakeholders need to review the plan before it is published

Click **Preview** to check the presentation, then click **Share Preview Link** to provide stakeholders with access to the preview. Wait for required feedback and approvals, then return with **Back to Review** before publishing.