



**Connecticut Department of Social Services
Enterprise Program Management Office**

Work Breakdown Structure Workbook

Purpose of the Work Breakdown Structure Workbook

The Work Breakdown Structure (WBS) is a view into the project which shows what work the project encompasses. It is a tool which helps to easily communicate the work and processes involved to execute the project. The Project Manager and project team use the WBS to develop the project schedule, resource requirements and costs. There are many ways you can present the WBS for your project; this template provides two of the three most popular layouts from which you can choose.

Depending on where in the Project Management Plan you're putting the WBS, a different layout may be more suitable for you. For instance many Project Managers include a high level WBS in outline form in MS Word in the project management plan, then a detailed table version pasted from an excel spreadsheet as an appendix to the plan.

You may find that you prefer one layout for a high level WBS and a different one for a detailed WBS.

Information to Include

In order to save space in this work breakdown structure template we only developed the WBS examples down to the fourth level. In your project you will want to develop them down to a more detailed level using the 8 to 80 rule (where the WBS is broken down to where a work package contains between 8 and 80 hours of work to complete).

When To use the Work Breakdown Structure Workbook

Outline View - The outline view presents an easy to view and understand layout for the WBS. It is also a good layout to use when developing the WBS because you can easily make changes, especially since the Microsoft Word auto numbering feature updates the WBS Code automatically.

Hierarchal View - The hierarchal structure is similar to the outline view but without indentation. It fits well into a spreadsheet. Although this format is more difficult to read, it may be useful where you have many levels and indenting each level would make the table too large to fit into a document.

Tabular View - The Tabular View is an organized table view of the WBS. It is a good option that is easy to read for organizations which prefer table formats.

Dictionary - The WBS Dictionary contains all the details of the Work Breakdown Structure which are necessary to successfully complete the project. Most importantly it contains a definition of each Work Package which can be thought of as a mini scope statement. Resources on the project will look at the WBS dictionary to determine the scope of the Work Package they've been assigned, so it's important to be clear when writing the definition. Most WBS dictionaries contain more information than we show in the workbook. These things can include Level of Effort, Cost Control Numbers, Resource Assignments, Responsibility Assignments - just to name a few.

Glossary - The Glossary is a reference of definitions of terms and abbreviations as some of the terms or abbreviations may not be understood by persons who do not have a project management background. For instance what the PMI Practice Standard for Work Breakdown Structures refers to as the WBS Code is commonly referred to as the WBS number.

Instructions

Enter the information defined below in the appropriate WBS tab. <Purple or bracketed content in the document is offered as an example only. The PM may choose to use the content provided in total or in part as the project requires>.

WBS-Outline

WBS Code - The section number or ID for the line item in the outline

Element: Project, Phase, Activity or Task - Depending on the level of the item in the outline, the project name, project phase, activity, task or subtask.

Resources - The resources required to execute the activity or task by role if individuals are not assigned

WBS-Hierarchical

Level - The level of the item; i.e. Project = 1, Phase = 2, Activity = 3, Task = 4 or Subtask = 5.

WBS Code - The section number or ID for the line item in the outline

Element: Project, Phase, Activity or Task - Depending on the level of the item in the outline, the project name, project phase, activity, task or subtask.

Resources - The resources required to execute the activity or task by role if individuals are not assigned

WBS-Tabular

Level 1 - Project; The name of the project, module or component

Level 2 - Phase; The name of the project phase e.g., initiation, planning, execution, control, closeout

Level 3 - Activity or Task; the work to be performed

Level 4 - Subtask; additional details of the work to be performed

Resources - The resources required to execute the activity or task by role if individuals are not assigned

WBS-Dictionary

Level - The level of the item; i.e. Project = 1, Phase = 2, Activity = 3, Task = 4 or Subtask = 5.

WBS Code - The section number or ID for the line item in the outline

Project, Phase, Activity or Task - Depending on the level of the item in the outline, the project name, project phase, activity, task or subtask.

Definition - a detailed description of the WBS Element

DSS Project Management recommends the file name be added to the page footer during the project decision log set up.

Work Breakdown Structure Outline

WBS Code	Element: Project, Phase, Activity or Task	Resources
1	<Widget Management System>	
1.1	Initiation	
1.1.1	Evaluation & Recommendations	DSS Project Management, PM, Sponsor
1.1.2	Develop Project Charter	PM
1.1.3	Deliverable: Submit Project Charter	PM
1.1.4	Project Sponsor Reviews Project Charter	Sponsor
1.1.5	Project Charter Signed/Approved	DSS Project Management, PM, Sponsor
1.2	Planning	
1.2.1	Create Preliminary Scope Statement	PM, BA
1.2.2	Determine Project Team	DSS Project Management, PM
1.2.3	Project Team Kickoff Meeting	
1.2.4	Develop Project Plan	
1.2.5	Submit Project Plan	
1.2.6	Milestone: Project Plan Approval	
1.3	Execution	
1.3.1	Project Kickoff Meeting	
1.3.2	Verify & Validate User Requirements	
1.3.3	Design System	
1.3.4	Procure Hardware/Software	
1.3.5	Install Development System	
1.3.6	Testing Phase	
1.3.7	Install Live System	
1.3.7	User Training	
1.3.9	Go Live	
1.4	Control	
1.4.1	Project Management	
1.4.2	Project Status Meetings	
1.4.3	Risk Management	
1.4.4	Update Project Management Plan	
1.5	Closeout	
1.5.1	Audit Procurement	
1.5.2	Document Lessons Learned	
1.5.3	Update Files/Records	
1.5.4	Gain Formal Acceptance	
1.5.5	Archive Files/Documents	

Work Breakdown Structure
Hierarchical

Level	WBS Code	Element: Project, Phase, Activity or Task	Resources
1	1	<Widget Management System>	
2	1.1	Initiation	
3	1.1.1	Evaluation & Recommendations	DSS Project Management, PM, Sponsor
3	1.1.2	Develop Project Charter	PM
3	1.1.3	Deliverable: Submit Project Charter	PM
3	1.1.4	Project Sponsor Reviews Project Charter	Sponsor
3	1.1.5	Project Charter Signed/Approved	DSS Project Management, PM, Sponsor
2	1.2	Planning	
3	1.2.1	Create Preliminary Scope Statement	PM, BA
3	1.2.2	Determine Project Team	DSS Project Management, PM
3	1.2.3	Project Team Kickoff Meeting	
3	1.2.4	Develop Project Plan	
3	1.2.5	Submit Project Plan	
3	1.2.6	Milestone: Project Plan Approval	
2	1.3	Execution	
3	1.3.1	Project Kickoff Meeting	
3	1.3.2	Verify & Validate User Requirements	
3	1.3.3	Design System	
3	1.3.4	Procure Hardware/Software	
3	1.3.5	Install Development System	
3	1.3.6	Testing Phase	
3	1.3.7	Install Live System	
3	1.3.7	User Training	
3	1.3.9	Go Live	
2	1.4	Control	
3	1.4.1	Project Management	
3	1.4.2	Project Status Meetings	
3	1.4.3	Risk Management	
3	1.4.4	Update Project Management Plan	
2	1.5	Closeout	
3	1.5.1	Audit Procurement	
3	1.5.2	Document Lessons Learned	
3	1.5.3	Update Files/Records	
3	1.5.4	Gain Formal Acceptance	
3	1.5.5	Archive Files/Documents	

Work Breakdown Structure

Level 1 - Project	Level 2 - Phase	Level 3 - Activity or Task	Level 4 - Subtasks (As required)	Resources	
1 <Project, System, Component or Module>	1.1 <Initiation>	1.1.1 <Evaluation & Recommendations>	1.1.1.1 <Executive Business Case Review & Approval>	DSS Project Management, PM, Sponsor	
			1.1.1.2 <Project Intake Form Submit & Approve>	DSS Project Management, PM	
			1.1.1.3 <Approval to Start Work>	DSS Project Management, PM, Sponsor	
		1.1.2 <Develop Project Charter>		PM	
			1.1.3 <Deliverable: Submit Project Charter>	1.1.3.1 <Review Charter w/DSS Project Management>	PM
				1.1.3.2 <Walkthrough Charter with Sponsor>	PM
	1.1.3 <Deliverable: Submit Project Charter>	1.1.3.3 <Submit Charter to DSS Project Management>	PM		
		1.1.4 <Project Sponsor Reviews Project Charter>			
		1.1.5 <Project Charter Signed/Approved>			
	1.2 <Planning>				
	1.3 <Execution>				
	1.4 <Control>				
	1.5 <Closeout>				

WBS Dictionary

Level	WBS Code	Project, Phase, Activity or Task	Definition
1	1	<Widget Management System>	All work to implement a new widget management system.
2	1.1	Initiation	The work to initiate the project.
3	1.1.1	Evaluation & Recommendations	Working group to evaluate solution sets and make recommendations.
3	1.1.2	Develop Project Charter	Project Manager to develop the Project Charter.
3	1.1.3	Deliverable: Submit Project Charter	Project Charter is delivered to the Project Sponsor.
3	1.1.4	Project Sponsor Reviews Project Charter	Project sponsor reviews the Project Charter.
3	1.1.5	Project Charter Signed/Approved	The Project Sponsor signs the Project Charter which authorizes the Project Manager to move to the Planning Process.
2	1.2	Planning	The work for the planning process for the project.
3	1.2.1	Create Preliminary Scope Statement	Project Manager creates a Preliminary Scope Statement.
3	1.2.2	Determine Project Team	The Project Manager determines the project team and requests the resources.
3	1.2.3	Project Team Kickoff Meeting	The planning process is officially started with a project kickoff meeting which includes the Project Manager, Project Team and Project Sponsor (optional).
3	1.2.4	Develop Project Plan	Under the direction of the Project Manager the team develops the project plan.
3	1.2.5	Submit Project Plan	Project Manager submits the project plan for approval.
3	1.2.6	Milestone: Project Plan Approval	The project plan is approved and the Project Manager has permission to proceed to execute the project according to the project plan.
2	1.3	Execution	Work involved to execute the project.
3	1.3.1	Project Kickoff Meeting	Project Manager conducts a formal kick off meeting with the project team, project stakeholders and project sponsor.
3	1.3.2	Verify & Validate User Requirements	The original user requirements is reviewed by the project manager and team, then validated with the users/stakeholders. This is where additional clarification may be needed.
3	1.3.3	Design System	The technical resources design the new widget management system.
3	1.3.4	Procure Hardware/Software	The procurement of all hardware, software and facility needs for the project.
3	1.3.5	Install Development System	Team installs a development system for testing and customizations of user interfaces.
3	1.3.6	Testing Phase	The system is tested with a select set of users.
3	1.3.7	Install Live System	The actual system is installed and configured.
3	1.3.7	User Training	All users are provided with a four hours training class. Additionally, managers are provided with an additional two hours class to cover advanced reporting.
3	1.3.9	Go Live	System goes live with all users.
2	1.4	Control	The work involved for the control process of the project.
3	1.4.1	Project Management	Overall project management for the project.
3	1.4.2	Project Status Meetings	Weekly team status meetings.
3	1.4.3	Risk Management	Risk management efforts as defined in the Risk Management Plan.
3	1.4.4	Update Project Management Plan	Project Manager updates the Project Management Plan as the project progresses.
2	1.5	Closeout	The work to close-out the project.
3	1.5.1	Audit Procurement	An audit of all hardware and software procured for the project, ensures that all procured products are accounted for and in the asset management system.
3	1.5.2	Document Lessons Learned	Project Manager along with the project team performs a lessons learned meeting and documents the lessons learned for the project.
3	1.5.3	Update Files/Records	All files and records are updated to reflect the widget management system.
3	1.5.4	Gain Formal Acceptance	The Project Sponsor formally accepts the project by signing the acceptance document included in the project plan.

WBS Dictionary

Level	WBS Code	Project, Phase, Activity or Task	Definition
3	1.5.5	Archive Files/Documents	All project related files and documents are formally archived.

Work Breakdown Structure Glossary

Term	Definition
Level of Effort (LOE)	Level of Effort (LOE) is how much work is required to complete a task.
Work Breakdown Structure (WBS)	A view into a project which shows what work the project encompasses.
WBS Code	A unique identifier assigned to each element in a Work Breakdown Structure for the purpose of designating the elements hierarchical location within the WBS.
Work Package	A deliverable or work component at the lowest level of its WBS branch.
WBS Component	A component of a WBS which is located at any level. It can be a Work Package or a WBS Element as there's no restriction on what a WBS Component is.
WBS Element	A single Work Breakdown Structure component and its associated attributes located anywhere within a WBS. A WBS Element can contain work, or it can contain other WBS Elements or Work Packages.