Planning is a process of organizing your productive resources—time, money, people, equipment, materials, information—before you begin an assignment or a project.

Planning creates a “road map” that will direct and coordinate all that needs to be accomplished to implement a project or carry out an assignment.

If you begin a project without understanding the resources you need and how to organize them, you run a high risk of failure.

Planning prevents problems, so you can spend your working hours on productive activities and not just putting out fires.

Planning can make your work group more productive by anticipating potential roadblocks and taking action to deal with them in advance. It helps you stay on top of the situation.

Achieving your goals successfully depends heavily on your ability to plan and schedule your work.

Why Is Planning Important?

- Planning tools: What is a work breakdown structure (WBS)?
- Examine a sample Gantt chart
- Learn about a forced-pair comparison tool to select priorities

Elements of Effective Planning and Scheduling

A Gantt chart (named after its creator, Henry Gantt), is used to schedule work, establish checkpoints and monitor progress.

Work Responsibility Chart is used to assign work responsibilities to project team members.

Many tools exist to help you with these tasks. A Work Breakdown Structure (WBS) is used to identify major elements, tasks and sub-tasks of a project. Defining the key components of a project will help you identify resource requirements and create a budget.
Tool 1- Work Breakdown Structure (WBS)

What It Is
A method for breaking down the work or project into major elements, tasks and subtasks.

When It Is Used
It’s used to define the key components of the project, monitor progress and assess accomplishment.

How to Develop a Work Breakdown Structure
1. Break the work down into major elements or large categories of work.
2. Identify the tasks within those elements; that is, smaller “chunks” of work that comprise the element.
3. Identify the subtasks to accomplish each task.

Once you have clearly defined the subtasks, you can more accurately anticipate, estimate and allocate your resources as well as schedule the work.

Example of Tree Diagram WBS: Processing Mail

Process Incoming Mail

Pick Up Mail From The Mailroom

Open And Date Mail

Sort Mail

Separate Bulk/Third Class Mail

Separate Letters/Correspondence

Separate Invoices And Bills

Sort Catalogs

Place In Inboxes Of Department Staff

Prepare And Attach Documentation

Forward To Accts. Payable For Payment

Indented Outline WBS

Project Name
1. Major Work Element
   1.1 Task
   1.1.1 Subtask
   1.2 Task
   1.2.1 Subtask
   1.2.2 Subtask
2. Major Work Element
   2.1 Task
   2.1.1 Subtask
   2.1.2 Subtask
   2.1.3 Subtask
**Example of Work Responsibility Chart: Department Dress Code Project**

<table>
<thead>
<tr>
<th>Task</th>
<th>Subtask</th>
<th>Employee Responsible</th>
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<tbody>
<tr>
<td>Department Policy Drafted</td>
<td>Review samples of other policies</td>
<td>P-Jerry, S-Elena</td>
</tr>
<tr>
<td></td>
<td>• Get input from staff committee</td>
<td></td>
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<tr>
<td></td>
<td>• Ensure compliance</td>
<td>P-Jerry</td>
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<tr>
<td></td>
<td>• Write policy</td>
<td>Harry (Legal Mgt.)</td>
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<tr>
<td>Policy Reviewed and Approved</td>
<td>• Have document signed/dated by Department Head</td>
<td>P-Jerry and management team</td>
</tr>
<tr>
<td>Policy Presented</td>
<td>• Present and explain policy at monthly department meeting</td>
<td>P-Jerry and senior manager</td>
</tr>
<tr>
<td>Disseminate Policy</td>
<td>• Provide copies to employees</td>
<td>P-Department Managers</td>
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<tr>
<td></td>
<td>• Include policy in new employee orientation manual</td>
<td>P-Sarah</td>
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</tbody>
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**Gantt Chart**

A **Gantt Chart** (also known as a bar chart or milestone chart) is a technique for plotting tasks and subtasks for a project on a timeline to depict when activities begin and end. It identifies the sequence of events, how long each task will take and what activities can or need to occur simultaneously. List tasks or subtasks down the left side of the page and timelines horizontally. Time can be reflected in hours, days, weeks or months.
**Forced-Pair Comparisons to Select Priorities**

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* Use this grid to select among competing priorities. Circle the one number of the two in each box, that represents the more preferred of the two projects or tasks. You must make a choice and circle only one number per cell.

* Count the number of times each item was circled and enter its score on the bottom line of the grid under “Item Score”.

* Rank order the list of item scores. The item with the highest score is number 1. The item with the second highest score is number 2 and so on. In case of a tie, you may do a mini-grid for the tied items.

* This simple tool allows you to rank order candidate projects, tasks (or anything really)!

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**Resources for Further Reading**


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**Activities During the Four Phases of a Project**

**Defining - Phase 1**
- Determine objectives
- Define scope
- Select strategy

**Planning - Phase 2**
- Write specifications
- Develop schedule
- Develop budget

**Implementing - Phase 3**
- Monitor performance
- Take corrective action
- Provide feedback
- Resolve differences

**Completing - Phase 4**
- Deliver output
- Wrap up the details
- Evaluate the experience

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**Contact Us at:** University Human Resources, Learning & Professional Development