Contents

Preface vii
Foreword xv

Part I Introduction To WBS Concepts 1

1 Background and Key Concepts 3
   Chapter Overview 3
   Work Breakdown Structures 4
   Defining Work Breakdown Structures 5
   Importance of the WBS 7
   WBS Lesson Learned: A Brief Illustration 8
   WBS Concepts 12
   Describing the WBS 12
   The House Metaphor–A Consistent Example 14
   Chapter Summary 15

2 Applying WBS Attributes and Concepts 19
   Chapter Overview 19
   WBS Attributes 19
      WBS Core Characteristics 20
      WBS Use-Related Characteristics 25
   WBS Decomposition 28
   WBS in Projects, Programs, Portfolios, and the Enterprise 30
   WBS Representations 32
   WBS Tools 36
   Chapter Summary 38

Part II WBS Application In Projects 41

3 Project Initiation and the WBS 43
CONTENTS

Chapter Overview
Project Charter
Preliminary Project Scope Statement
Contracts, Agreements, Statements of Work (SOW)
Chapter Summary

4 Defining Scope through the WBS

Chapter Overview
Product Scope Description
Project Scope Statement (Scope Definition)
Work Breakdown Structure
Beginning with the Elaborated WBS
Use-Related Characteristics
WBS Dictionary
Deliverable-Based Management
Activity-Based Management
Scope Baseline
Acceptance Criteria
Chapter Summary

5 The WBS in Procurement and Financial Planning

Chapter Overview
Build versus Buy Decisions
Cost Estimating
Cost Budgeting
Cost Breakdown Structure
Chapter Summary

6 Quality, Risk, Resource and Communication Planning with the WBS

Chapter Overview
Approaching Quality, Resource and Risk Planning
Using Existing Templates and Processes
Creating Processes to Support the Project
Utilizing the WBS as a Basis for Process Development
Employing the WBS and WBS Dictionary
The Whole is not Greater than the Sum of its Parts—it Equals Precisely 100% of the Sum of its Parts
Examining Process Considerations
Communications Planning Using the WBS as a Foundation

Chapter Summary
Contents

Developing the Communications Plan 101
The Communications Matrix 102
The Hierarchy of Information 103
The Meeting Matrix 107
Chapter Summary 109

7 The WBS as a Starting Point for Schedule Development 111
Chapter Overview 111
Demystifying the Transition from the WBS to the Project Schedule 113
Putting These Concepts to Work 117
The WBS in Hierarchical Outline Form 118
Identifying Dependencies between Scope Elements 119
Representing Scope Sequence and Dependency 119
Creating a High-Level Scope Sequence Representation 120
The Concept of Inclusion 121
The Scope Relationship Diagram 125
Creating a Scope Dependency Plan 129
Chapter Summary 132

8 The WBS in Action 137
Chapter Overview 137
Acquiring the Project Team 138
Directing and Managing Project Execution and Integrated Change Management 140
Performing Scope Management 141
Scope Management and the Triple Constraint 142
Reviewing the Relationship with Other Project Management Processes 143
Performing Quality Assurance 144
Performing Scope Verification 144
Chapter Summary 145

9 Ensuring Success through the WBS 147
Chapter Overview 147
Project Performance Management 148
Scope 149
Schedule 149
Cost 150
Planned versus Actual 151
| CONTENTS |
|---------------------|-----|
| Stakeholder Management | 152 |
| Chapter Summary | 153 |
| 10 Verifying Project Closeout with the WBS | 155 |
| Chapter Overview | 155 |
| Project Closeout | 155 |
| Acceptance / Turnover / Support / Maintenance | 156 |
| Contract Closure | 156 |
| Project Closeout | 157 |
| Chapter Summary | 157 |

**Part III  WBS For Project Management Decomposition** **159**

| 11 A Project Management WBS | 161 |
| Chapter Overview | 161 |
| Organization Options for a Project Management WBS | 162 |
| Project Management WBS Components Aligned with the *PMBOK® Guide*—Third Edition | 165 |
| Project Management WBS Lite | 168 |
| Chapter Summary | 170 |
| A Final Word | 170 |

Appendix A  Project Charter Example  173
Appendix B  Project Scope Statement Example  179
Appendix C  Project Management WBS Examples  187
Appendix D  Answers to Chapter Questions  253

Index  275