

Activity Overview

In the last activity, [*Use a WBS to create project tasks and milestones - Part 1*](#), you filled out a WBS brainstorm diagram with tasks and milestones. In this activity, you will use that diagram to complete a WBS spreadsheet. You will use this spreadsheet to assign tasks owners and sort milestones and tasks into sequential order.

Be sure to complete this activity before moving on. The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the scenario below. Then complete the step-by-step instructions.

As a project manager for Office Green, you are developing an Operations and Training plan for the new Plant Pals service. It will take six months to fully implement all protocols, including setting up operational tools, putting delivery processes in place, and training employees. You have already added milestones and tasks for this project to a WBS brainstorm diagram. Here are the milestones and their associated tasks:

- Establish a plant delivery and logistics plan: Team members will need to source materials for packaging and hire delivery drivers. They are also responsible for calculating the delivery fees.
- Select and install supply chain software and equipment: Team members will supervise vendor setup of inventory management and fulfillment software. They must also supervise vendor installation of fulfillment equipment and determine internal safety protocols for the equipment.
- Develop and launch an employee training program: Team members will need to develop training sessions, train employees to use the software and equipment, and monitor employee progress and improve training processes.

Now you will add those tasks and milestones to a WBS spreadsheet. You will also use the sheet to record task owners and any notes about the tasks and their owners. The project sponsor for the Operations and Training plan, the Director of Operations, has put together a team for the operations launch. You can select task owners from among the following team:

- A Financial Analyst, who tracks and calculates costs and revenue
- A Fulfillment Director, who sources materials, ensures equipment is functional, and confirms fulfillment processes are correctly implemented
- An Inventory Manager, who maintains inventory and oversees software installation

- A Human Resources Specialist, who manages hiring and develops training protocols (with the help of the Training Manager)
- A Training Manager, who reports to the HR Specialist, runs the training program on the established protocols, and refines training processes
- A Quality Assurance Tester, who ensures product quality and determines safety protocols and best practices

Step 2: Add milestones

First, open your WBS brainstorm diagram. Then record the three milestones from your brainstorm diagram under the Milestone column of your WBS Spreadsheet.

Step 3: Add tasks

Enter the tasks from your brainstorm diagram under the Task column of your spreadsheet. Write each task next to the corresponding milestone and task ID number. Assigning each task to an ID number helps you organize, analyze, and search for particular tasks as the list grows. Task IDs are especially useful for large or complex projects.

Task ID numbers tell you two things: 1) which milestone each task relates to and 2) the sequence of the tasks. So, task 1.1 is the ID for the first task of the first milestone. Task 1.2 is the second task of the first milestone, and so on.

When you finish, you should have nine tasks in your spreadsheet—three for each milestone.

Step 4: Add task owners and notes

To the right of the Task column are columns for Owner and Notes. Here, you can record important details that didn't fit into your WBS diagram.

First, review the scenario and determine which of your team members should own each task. Then enter that person's role next to the task in the Owner column.

Record any helpful details from the scenario in the Notes column. For example, including the description of the task owner's role would remind you of each person's responsibilities.

If you'd like, you can also add your best estimate of how long each task might take in the Duration column (this is optional).

Step 5 (Optional): Add tasks to Asana

Many organizations use work management tools like Asana in addition to standard spreadsheets. Hiring managers might even ask you about your experience with work management software in interviews. That's why we recommend recreating your WBS in Asana.

First, create an Asana account (if you don't already have one). Then, create a project within Asana. Finally, add milestones for each assignment and add tasks to the milestones.

For more detailed instructions on how to create an account, project, or milestone, click the links below:

- [Create an account](#)
- [Create a project](#)
- [Create a milestone](#) (a premium Asana feature)

You can also import task data into Asana using a .CSV file. Click the links below to learn more about the CSV importer.

- [CSV importer - Asana](#)
- [Tips to organize your data in a spreadsheet for uploading](#)
- [Steps to import a spreadsheet into Asana](#)