

Our group has expressed a desire to take the idea of standardizing the WBS across like projects back to our organization and daily practice. We have also recognized that it won't happen easily or quickly. So, we decided to develop a process / checklist of sorts that will allow us to begin making the transition to a more consistent approach to defining our projects.

Considerations for a quality, consistent WBS across multiple projects:

1. Incorporate the major phases and key tasks required for each project across an adopted standard methodology. This will create the basis for a standard, base template to be used across all projects.
2. The template should provide detail related to the methodology (for instance, already outlining the major phases and tasks as discussed in 1 above), and also guidance on any considerations necessary for breaking down those phases further. If trends can be identified, they should be captured in the template.
3. Identify within the template where general questionnaires or checklists (to be developed) should be used to perform reviews (such as a quality review, or interview for data collection) where the same processes are performed across all projects.
4. Incorporate a portion of work within the standard WBS to define the unique aspects of each project, so that they are fully planned and accounted for individually, but roll up into the general framework appropriately as well.
5. The WBS should include:
 - a. Identification numbers, where the project is the high level number (such as 1, 2, etc)
 - b. Levels be defined based on outcomes
 - c. Last level include a trigger or spot to document the responsible person or party for the particular scope of work, deliverable, effort or activity
6. Effective means for establishing and tracking the WBS dictionary, along with some general, easy to understand guidelines for what information should go in a dictionary and perhaps, when.

In order to incorporate aspects of the above considerations into our WBS within our own organizations, we have decided to take the following approach:

- a. Compare three project WBS that are either underway or have recently been completed that are grouped by a set of defined criteria.
 - a. Validate that each project adhered to the same "methodology" – if not, we must agree on a standard methodology before proceeding.
 - b. Identify trends and common phases and tasks at the highest level of the WBS that would fit and mold well within each project.
 - c. Create a base template, incorporating the identified trends as the highest level of the WBS, and validate the methodology is fully captured within this level of breakdown.

- b. Looking at a single project at a time, identify 3 – 5 areas on the WBS that are already standardized, or follow a standard checklist or process for activities such as data collection, quality reviews, testing, etc.
 - a. Incorporate the identification of these practices into the template, breaking down the WBS within the appropriate phase or high-level task/deliverable/outcome (the 1.1 level) to specify the use of the practice / checklist / procedure /etc
 - b. Repeat for as many projects as time allows
- c. Review the dictionary for 2 or more projects and combine the information into a general template. Apply this template to the WBS template being developed.
- d. Incorporate an activity within the WBS template to ensure that the template is reviewed either during or toward the close of the project to make necessary adjustments and improvements.
- e. Review the WBS template and provide clarification where needed and further guidance at any of the lower levels of the WBS that are already broken down.

Lastly – the key is to take this new template and put it into practice, with each new project, knowing full well that it will be an iterative process and that the template will expand and grow as the definition of projects is refined over time.