

## Create Your Workback Schedule

Industry and business professionals know that being on time and on budget are critical to getting the work done and keeping clients happy. In project based programs of study, you are learning and using the same tools to stay on top of the education projects that build into professional skills. When you have a major team project there is no time to waste, use a Workback Schedule to ensure you get done on time.

### Workback Schedules

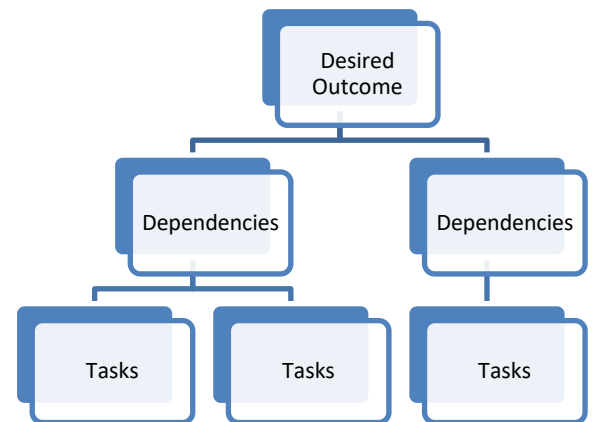
These are an overview of your project, including the timeline, project tasks, dependencies, and assigned team members. Essentially, a project workback schedule outlines everything about your project process so that you track progress through the high-level details and components that need to be completed.

### Creating a Workback Schedule

It is called 'workback' because you start with the intended final outcome and then break the elements down into step back from completion to build an interdependent hierarchy of steps to get to the outcome. Conditional on the size and scope of the project, schedules vary in complexity. There are basic steps that you can use to create any workback schedule. Start by completing each of these steps and expand your schedule from there.

#### Set Outcomes and Dependencies

Your first team meeting will be critical to set the major outcomes and a brainstormed task list for each step. When deciding on how to order them and allotting time be aware that factors may change as you go along, but the best place to start is to set due dates and identify those tasks that are dependent on each other. Making an educated guess on how much time to allot and putting the tasks on a workback calendar is a good start. *(The flow chart here is simplified.)*



#### Identify Stakeholders and Resources

ISO 26000, which is the international standard providing guidance on social responsibility, defines a stakeholder as an "individual or group that has an interest in any decision or activity of an organization." Your projects will often have stakeholders who have an interest in the project and who may also provide or be a conduit to resources that the project needs. Identifying these parties will have a beneficial impact on both the design of your project and the end product.

#### Allocate Resources

Once there is a general idea of task order and dependencies, it's time to decide which resources will be needed to complete these tasks. This includes how many hours and which team members each task will require. Some tasks will need more resources than others so allocating them task-by-task ensures each has enough resources without shorting other tasks. Start by breaking up resources and allocating them as equally as possible. If there are remaining resources at the end of tasks, they can always be reallocated to other upcoming tasks. You will continue to adjust this as the workback schedule takes shape.

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### **Work Backward to Set Due Dates for Each Task**

There is always an emphasis on the project's final due date. Often teams think that other timeline dates do not matter, so long as the entire project is finished on time. This line of thinking can lead to disaster and a project that is pasted together at the last minute. You need to be mindful not to take task due dates for granted or not set them at all.

Plot tasks on your workback plan, with each task's resources and dependencies in mind. Sequencing is important to consider as well since certain tasks will need to be finished before another can start. Some tasks may only take one team member, while others take several. These team members are then less available for other tasks. As with resources, tasks should be assigned as evenly as possible to prevent burnout.

Creating tasks with firm trajectories and due dates is the foundation for finishing the project as a whole on time. If a task does run over, knowing its original due date shows exactly how to adjust upcoming tasks in order to compensate.

### **Try Different Versions of the Workback Schedule**

One pitfall that team may fall into when creating a workback schedule is not being willing to adapt. The first draft is a place to start. The team needs to consider many different options before solidifying a schedule. In a workback schedule, this means spreading tasks out and allocating resources in different ways until you find the best solution for this project. Use the initial planning time to play with the process and create a series of options to compare. This process can be done with modern planning tools such as Miro (<https://miro.com/>) and others.

### **Create Contingency Plans**

Consider the worst-case scenario. Things have gone awry, and there's a risk of going past the due date. Just like that, a few failed or overdue tasks can sink the entire project. The trick to avoiding this is creating several contingency plans that react to certain things not meeting the initial plan. When X happens, then it will impact Y as well. In a workback schedule, this means having a plan to adapt the schedule while maintaining the same due date. A good way to think about this is that the start date and due date are bookends. Everything between them must be adaptable.

### **Conclusion**

Creating a workback schedule is a nuanced team process that often requires trial and error. That said, these essential elements will set you on the path to success.

### **References:**

Learning Aid materials adapted from a variety of business resources, including:  
<https://asana.com/resources/project-timeline-schedules>  
<https://www.indeed.com/career-advice/career-development/workback-schedule>  
<https://www.runn.io/blog/workback-schedule>