



# DOD Mentoring Resource Portal

## PLANNING AND PRIORITIZING TASKS

### LESSON

Information for Supervisors Portfolio  
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## PLANNING AND PRIORITIZING TASKS

*On the importance of Project Management “Operations keeps the lights on, strategy provides a light at the end of the tunnel, but project management is the train engine that moves the organization forward.” -Joy Gumz*

Successful completion of tasks and projects is critical to the mission success. This lesson discusses methods for effectively planning and prioritizing tasks and projects.

## OBJECTIVES

After completing this Lesson, you should be able to:

- Discuss the supervisor’s importance in planning and prioritizing team tasks
- Demonstrate how to plan for completion of a task/project
- Demonstrate the ability to manage team members’ leave and flexible work schedules to accomplish the mission given a set timeline

## SUPERVISOR RESPONSIBILITIES

As a supervisor your responsibility is to work within the project management lifecycle to:

- Plan and prioritize team tasks using project management tools such as a project schedule and a work breakdown structure.
- Apply team management techniques when developing the project schedule, considering leave but focusing on goals.

## PROJECTS AND ORGANIZATIONAL MISSION

### **Supervisor Responsibility**

Supervisors with the DCPAS should plan and prioritize projects according to the contributions these projects make to the organizational mission.

### **Systematic Process**

In order to effectively manage projects, supervisors should use a systematic process to plan and prioritize projects. One such process is the work breakdown structure.

### **Work Breakdown Structure (WBS)**

PMBOK® defines a work breakdown structure (WBS) as a “...deliverable-oriented hierarchal decomposition of the work to be executed by the project team to accomplish the project objectives and create the required deliverables. It organizes and defines the total scope of the project. Each descending level represents an increasingly detailed definition of the project work.”<sup>1</sup>

There are many variables to consider when developing a project schedule. A WBS is a helpful tool for identifying all of the steps and tasks involved in a successful project.

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<sup>1</sup> A Guide to the Project Management Body of Knowledge, Pennsylvania: Project Management Institute, 2004, p. 112.

**Purpose of the WBS**

The purpose of a WBS is to outline an entire project in enough detail that stakeholders can identify ALL of the work or tasks associated with the project.

Additionally, a WBS is used to make informed decisions about the direction, staffing, time frames, and boundaries of a project.

**Work Packages**

A WBS accomplishes this by separating all tasks within the project into discrete components called “work packages.”

Found at the lowest levels of the WBS, work packages are the most detailed entries in a WBS and, therefore, can be easily monitored, controlled, costed, and scheduled.<sup>2</sup>

Because all activities listed in the WBS have been separated from the larger actions and deliverables with which they are associated, project teams can “roll” projects up or down, changing from a very broad view of the project--phases and major deliverables--to a very detailed view--the single deliverables and actions that comprise the work packages.

**The DoD and Documented Processes**

Documented processes, as well as activities and logic that exist from analogous programs, and functional processes may be used as templates for the system acquisition.

They include (but are not limited to) activities related to product development, logistics, training, facilities construction, hardware procurement, fabrication, assembly and test flows, and software development. Tables 2-1 and 2-2 show two views of WBSs.

**Table 2-1: Broad View of WBS**

“ROLLED UP” VIEW OF WBS	
1	Conduct Needs Assessment
2	Evaluate Data

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<sup>2</sup> Ibid.

**Table 2-2: More detailed view of WBS**

PARTIALLY “ROLLED DOWN” VIEW OF WBS	
1	Conduct Needs Assessment
1.1	Build surveys
1.2	Implement surveys
1.2.1	Email
1.2.2	In person
2	Evaluate Data
2.1	Collate survey results
2.2	Analyze survey results
2.3	Summarize survey results

## WORK PRIORITIES

### Syncing Workgroup Priorities with Mission Priorities

As a supervisor, it is your responsibility to ensure that the priorities of all the projects in which your workgroup is involved are aligned with mission priorities.

### Systematic Process

In order to establish project priorities that align with mission priorities, a supervisor must take the following actions:

- 1) **Identify mission priorities** - Are the mission priorities intended to improve customer service? Keep a critical system operational? Develop or maximize a competitive edge?
- 2) **Examine project priorities** – Will the project deliverables include training in customer service for key staff? Reinforce system fail safe protocols? Identify a market niche?

### Addressing Gaps between Project Outcomes and Mission Priorities

What if the project outcomes do not fully support the mission priorities? For instance, the project includes training for staff in how to better serve internal customers.

Is the mission priority of improving customer service aimed only at internal customers? If not, then the project priorities need to be adjusted to include training in servicing all customers—internal and external.

### Resource Allocation

When managing a project, effective resource allocation can be the most critical element. Unless a supervisor takes into account all of the aspects of project staffing, it is likely that the project will not be successful.

### Workgroup Capacity

DCPAS supervisors who are managing projects must determine the capacity of their workgroups in terms of:

- Number of staff available to participate
- Skill levels of each available participant
- Existing time commitments
- Existing leave commitments

#### Example:

Project A requires 130 hours, 100 of which must be filled by IT specialists. You have 4 weeks to complete the work. Your workforce capacity is as follows:

**Table 2-3: Workforce Capacity**

WORKGROUP MEMBER	SPECIALTY	TIME COMMITMENT	LEAVE	ASSIGNMENT
Alejandro	IT		40 hours to be taken within 1 month	
Betty	IT	75% to another workgroup		
C'ai	Non-IT		8 hours to be taken within 1 month	
Dee	Non-IT	20% to another workgroup		

**Table 2-4: Possible Workforce Capacity**

WORKGROUP MEMBER	SPECIALTY	TIME COMMITMENT	LEAVE	ASSIGNMENT
Alejandro	IT		40 hours to be taken within 1 month	30 hours per week for 2
Betty	IT	75% to another workgroup		10 hours per week
C'ai	Non-IT		8 hours to be taken within 1 month	15 hours total
Dee	Non-IT	20% to another workgroup		15 hours total

### Planning, Programming, Budgeting, and Execution System (PPBES)

Within the DoD, the primary resource-management tool is the PPBES, which is implemented through the Planning, Programming, Budgeting, and Execution (PPBE) process. It links short-term, mid-term, and long-term planning. However, the PPBES is much more. It is the structured methodology within

which DoD produces a set of prioritized objectives and tasks, a prioritized program, and finally a budget.

The PPBES was first introduced into the DoD in the early 1960s and is cyclic in nature, consisting of three distinct but interrelated phases: planning, programming, and budgeting. It establishes the framework and provides the mechanisms for resource and related force decisions for future years. It further provides the opportunity to reexamine prior decisions in light of the present environment (i.e., evolving threat, changing economic conditions, etc.). The ultimate objective of the PPBES is to equip and man the force, i.e., provide the project with the optimum mix of trained manpower, equipment, and support that is attainable within established fiscal constraints.

## RESPONSIBILITY ASSIGNMENT MATRIX (RAM)

According to the PMBOK®, a RAM is a tool that helps supervisors track who is doing what.

One type of RAM chart is the RACI chart, which tracks the roles the workgroup will be performing during the project. RACI is an acronym for: Responsible, Accountable, Consult, and Inform.

**Table 2-5: RACI Chart**

WORKGROUP MEMBER	DEFINE	DESIGN	DEVELOP	TEST
Alejandro	C	A	R	R
Betty	C	A	R	R
C'ai	R	A	C	I
Dee	A	B	C	I

R=Responsible      C=Consult      A=Accountable      I=Inform

## MILESTONES AND MILESTONE SCHEDULES

A milestone is a significant point or event in a project and, as such, serves to identify the progress of a project.<sup>3</sup>

Typically, milestones are established during the planning and prioritizing period of the project and are often illustrated using milestones schedules. Figure 2-1 represents a simple milestone schedule.

**Figure 2-1: Milestone Schedule**

EVENT	WK 1	WK 2	WK 3	WK 4
Build surveys	△			
Implement surveys		△		
Collate survey results		△	▽	
Analyze survey results			△	
Summarize survey results			△	▽

<sup>3</sup> A Guide to the Project Management Body of Knowledge, Pennsylvania: Project Management Institute, 2004, p. 364.

**Figure 2-1: Milestone Schedule**

EVENT	WK 1	WK 2	WK 3	WK 4
Build surveys	△			
Implement surveys		△		
Collate survey results		△	▽	
Analyze survey results			△	
Summarize survey results			△	▽

## TRACKING PROGRESS

Supervisors can track the progress of a project using established priorities and milestones.

### Project Priorities

For a project designed to deliver customer service training, project progress could be tracked through deliverables--i.e., as training materials are completed, as training is administered, and as students are assessed.

### Milestone Schedules

Figure 2-2 indicates that the workgroup has completed three of its five tasks.

**Figure 2-2: Using Schedule to Track Progress**

EVENT	WK 1	WK 2	WK 3	WK 4
Build surveys	△			
Implement surveys		△		
Collate survey results		△	▽	
Analyze survey results			△	
Summarize survey results			△	▽

## LESSON SUMMARY

The topics discussed in this lesson include:

- Understanding the supervisor's importance in planning and prioritizing workgroup tasks
- Planning and prioritizing projects in accordance with the organizational mission
- Planning, prioritizing, and supervisor responsibility
- Using the planning tool, the work breakdown structure (WBS)
- Allocating resources in light of workgroup capacity and the PPBES
- Working with the Responsibility Assignment Matrix (RAM)
- Tracking project progress