WBS Process Planning Worksheet

Appendix I · Use alongside the WBS examples in the Appendix to map out the steps in any recurring management process

QUICK REFERENCE — WBS LEVEL NUMBERING

WBS CODE	LEVEL NAME	DESCRIPTION / EXAMPLE
1.0	Major Process	The top-level category or phase — e.g., *Tenant Move-Out*, *Monthly Rent Collection*
1.1	Step within Process	A distinct step or task group — e.g., *Inspect Unit*, *Process Payments*
1.1.1	Specific Action / Decision Point	A discrete action or decision — e.g., *Document damages with photos*, *Is deposit sufficient?*

PROCESS INFORMATION

PROCESS NAME

e.g., Tenant Move-Out Procedure, Monthly Maintenance Inspection...

PROCESS DESCRIPTION

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STEP BREAKDOWN

WBS CODE	TASK / STEP	NOTES / DETAILS
1.0	Major Process or Phase...	Notes...
1.1	Step within process...	Notes...
1.1.1	Specific action or decision point...	Notes...
1.1.2	Specific action or decision point...	Notes...
1.2	Step within process...	Notes...
1.2.1	Specific action or decision point...	Notes...
1.2.2	Specific action or decision point...	Notes...

WBS CODE	TASK / STEP	NOTES / DETAILS
2.0	Major Process or Phase...	Notes...
2.1	Step within process...	Notes...
2.1.1	Specific action or decision point...	Notes...
2.1.2	Specific action or decision point...	Notes...
2.2	Step within process...	Notes...
2.2.1	Specific action or decision point...	Notes...
3.0	Major Process or Phase...	Notes...
3.1	Step within process...	Notes...
3.1.1	Specific action or decision point...	Notes...
3.1.2	Specific action or decision point...	Notes...
3.2	Step within process...	Notes...
3.2.1	Specific action or decision point...	Notes...

GETTING STARTED

1. Pick a monthly or recurring process — lease renewals, maintenance inspections, rent collection, vendor payments — and name it in the Process Name field above.
2. List each major phase or category as a **1.0 / 2.0 / 3.0** entry. Think of these as the chapters of the process.
3. Break each phase into its main steps at the **1.1 / 1.2** level. These are the distinct tasks someone would check off.
4. Expand any step that involves a decision or a sequence of specific actions to the **1.1.1 / 1.1.2** level. Use the Notes column for deadlines, responsible parties, or forms needed.
5. Use the **Save to Browser** button to preserve your work. Your saved worksheet stays on this device. To share or archive it, use **Download as Text**.