# Agile Taskmanagement with InLoox



An InLoox Whitepaper

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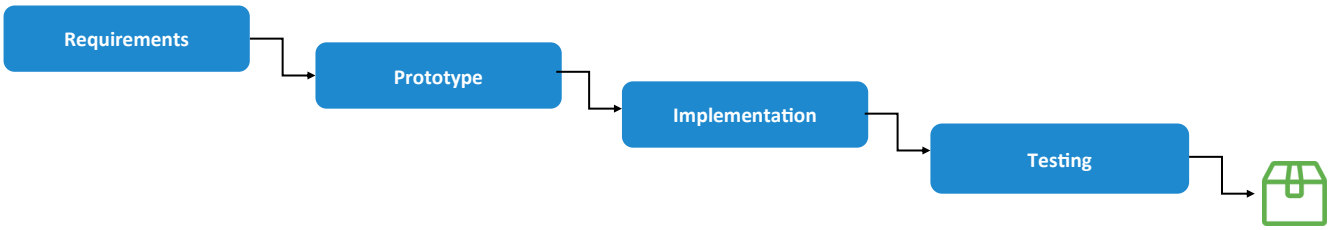
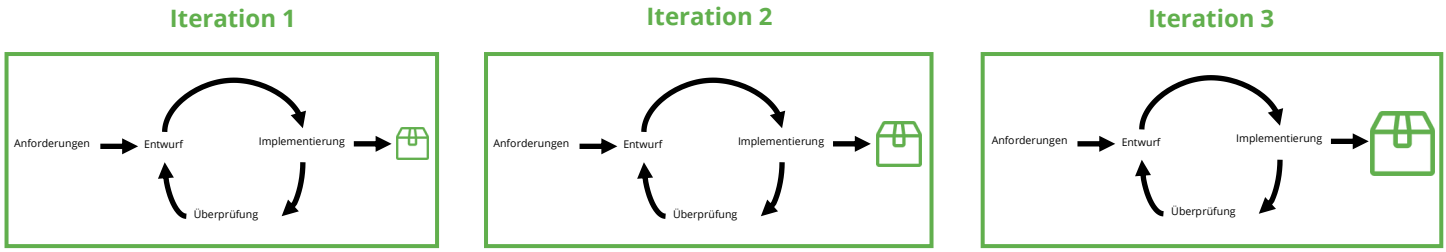
# 1. Agil versus classic

There is hardly a topic that divides the project management community as much as agile project management. Agile versus waterfall, Kanban versus Gantt – these are the fronts. On the one hand, there are the "traditionalists" who swear by waterfall planning and Gantt diagrams. Strict planning is the be-all and end-all of project execution for them. On the other hand, there are those who advocate an agile approach to project work. This group considers classic project management to be outdated and far too rigid. They argue that project management should also be flexible and that project teams should organize themselves. These are the two extremes, but you don't always have to choose one or the other. Sometimes it's the mix that makes the difference, because companies can use both methods in parallel. In this whitepaper we want to show you how easy it is to plan and manage tasks in an agile way. Even if you have only planned projects and tasks classically, it is possible to introduce agile task management.

**Waterfall planning**




**Agile planning**



# 2. What is agile project management?

Agile project management is often associated with software development. This makes sense, because the agile method has its origin in this industry. Agile was developed in the early 2000s, when software developers realized that traditional planning methods such as waterfall planning were not suitable for developing software. The speed of innovation in the IT industry is extremely high. Everything has to be faster, better, further. This fast-paced nature requires great flexibility from manufacturers and developers, which is not possible with strictly planned processes. Over time, this methodology has also been used in project management of other industries. Because not only software development is under pressure to release new products in ever shorter cycles, other industries also have to face this challenge if they want to remain competitive.

## Working agile

Agil is synonymous with the terms " dynamic " and " lively ". The guiding principles of agile project management are flexibility, adaptation and self-organization. This means that, contrary to classical planning, the agile approach does not have any fixed preliminary planning phases, but is iterative. Iterative means that you plan step by step (incrementally). The only thing that is defined from the onset is what the end product should look like. For this purpose, a catalogue of requirements is created in which all the specifications for the product are collected. The entire catalogue is not processed at once, but the product is implemented in various stages. The project manager and the team sit down at the beginning and select the requirements (tasks) which are processed in the first iteration. At the end of each iteration is always a fully functional intermediate product that can be presented to the client. The customer can then give feedback and on this basis, the project team plans the next iteration and continues working on the product.

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The advantage of this method is that there is no fixed, unchangeable plan, but the project team can adapt to new requirements. This allows the team more flexibility and self-determination as they can manage their work and schedule independently. The only thing they are required to do is to have a working product at the end of each iteration.



Behind the Agile Manifesto are these 12 principles, which have been slightly modified for our purposes:

- Our highest priority is to satisfy our customers through early and continuous delivery of valuable products.
- Requirement changes are welcome even late in the process. Agile processes use changes to the competitive advantage of the customer.
- Regularly deliver a working product within a few weeks or months, the shorter the time span the better.
- Technical experts and the project team must work together on a daily basis throughout the entire project.
- Establish projects around motivated individuals. Give them the environment and support they need and trust them to do the job.
- The most efficient and effective way to communicate information to and within the project team is in a face-to-face meeting.
- A functioning product is the most important measure of progress.
- Agile processes promote sustainable development. The client, the project team and the user should be able to maintain a steady pace of work indefinitely.
- Constant attention to technical excellence and good design promotes agility.
- Simplicity is essential.
- The best architectures, requirements and designs are created by self-organized teams.
- At regular intervals, the team reflects on how it can become more effective and adapts its behaviour accordingly.

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## Scrum

There are different agile methods. One of them is Scrum. The term originally comes from the rugby sport and describes a situation in which a group of players stays close together to take the ball away from their opponent. Teamwork is also one of the cornerstones of the Scrum method in project management. Scrum is about achieving a project goal as effectively as possible by working closely together in a team. It is important to remain flexible and dynamic.

> *"[Scrum is] a framework within which people can tackle complex, adaptive tasks and through which they are enabled to productively and creatively deliver products twith the highest possible value."*
>
> – Ken Schwaber, Jeff Sutherland
> *The Scrum Guide –Definition of Scrum*

Scrum is particularly suitable for projects that represent new territory for the team. With such projects, the team still faces many questions and it is difficult to precisely plan the course of the project from the beginning. In Scrum, this is not even necessary, because adjustments and changes in the process are already taken into account. The focus is on the self-organization and self-motivation of the team, and there are only a few rules.

These rules are limited to three artifacts, three central roles and five activities:

## Scrum roles

- **Product Owner:**

  The product owner is responsible for the successful implementation of the project, i.e. they are responsible for the business success. The Product Owner defines and prioritizes the requirements for the project and gives feedback to the team as soon as they have worked through these requirements. The product owner is also responsible for regular communication with the client.

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# SCRUM ROLES










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- **Scrum Master:**

  It is important to emphasize that the Scrum Master is not the project manager, but rather his function is that of a facilitator. He makes sure that the Scrum process works and that the rules of agile project management are followed. Tasks include communicating with the Scrum team, leading sprints and meetings, and eliminating any disruptions that may affect the Scrum team's work.

- **Scrum Team:**

  The Scrum team is responsible for the development of the product. It organizes itself and delivers the requirements in the order specified by the Product Owner.

**Scrum Artefacts:**

- **Product Backlog:**

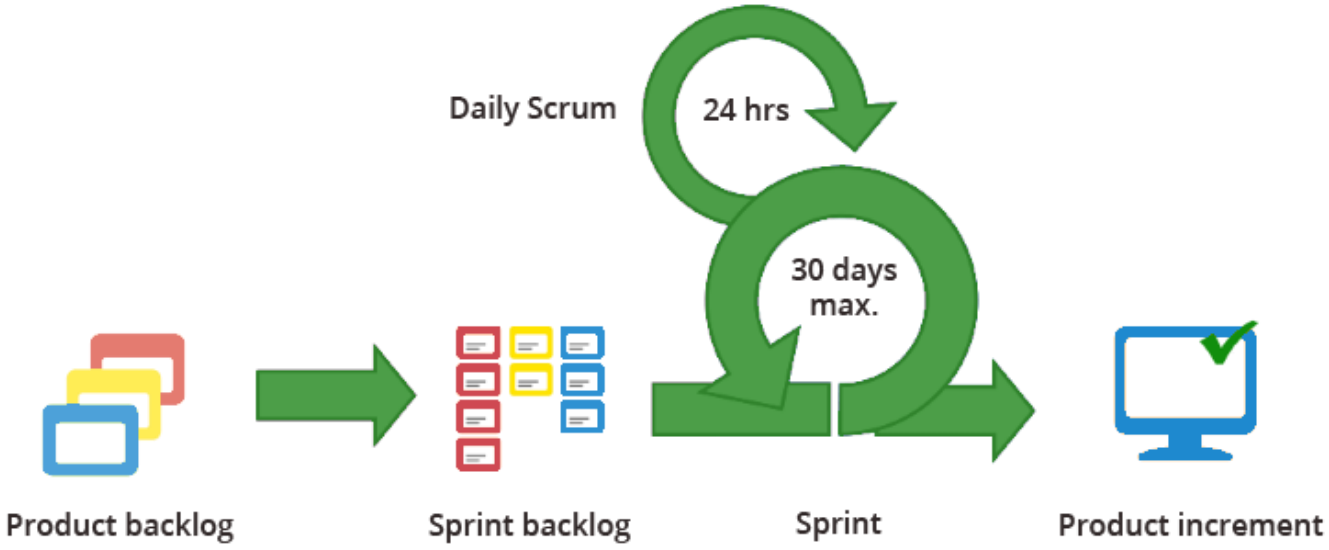
  Here, all product/project requirements are collected, organized and prioritized by the Product Owner.

- **Sprint Backlog:**

  For each sprint, a selection of requirements is taken from the product backlog, which are then processed within that sprint.

- **Product Increment:**

  After each sprint there must be a fully functional intermediate product (product increment) which can be presented to the client.



**Scrum Activities:**

- **Sprint Planning:**

  Each sprint must be planned from the get-go, i.e. the requirements from the product backlog must be divided into tasks that can ideally be completed within one day. The completed tasks of a sprint are entered in the sprint backlog.

- **Daily Scrum:**

  The Daily Scrum, as the name suggests, takes place daily. All team members meet to discuss the most important issues and to keep up to date. This meeting should not last longer than 15 minutes. It often helps to hold the meeting standing up so that the time frame is met.

- **Sprint Review:**

  After each sprint there is a review meeting, where the intermediate product is reviewed and the team gets feedback from the Product Owner and other stakeholders. The product backlog is then adjusted if necessary and the next steps are discussed.

- **Sprint Retrospektive:**

  The sprint retrospective is less about the final product than about the way the scrum team works. According to the agile principles, the team should reflect on the past sprint and learn from mistakes – and successes. In this way, the team can continuously improve itself and work even more effectively during the next sprint.

- **Product Backlog Refinement:**

  In this scrum activity, the Product Owner organizes and updates the product backlog as requirements change.

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## Kanban

Kanban is a method that originates from production process controlling. Kanban was developed in the 1960s by the Japanese automobile manufacturer Toyota. The aim was to use the Kanban principle to optimally control all production processes so that no bottlenecks could arise.

Translated into English, Kanban means "signal card". This describes Kanban quite well, because in Kanban "cards" are sorted into three different columns:

- **To Do**

  The leftmost column always contains the tasks that have not yet been started.

- **In Progress**

  When you start working on a task, it is moved to the middle column.

- **Done**

  Tasks that have been completed are moved to the far right column.

With Kanban the so-called "pull principle" applies, which means that the tasks are not assigned to a resource by the project manager, but the team members can pull their tasks themselves. In most cases, however, the number of tasks exceeds the time capacity of the team. Therefore, it is important to limit the number of tasks a team member can draw.

The advantage of the Kanban method is that you can visualize the work flow and thus bottlenecks, where work is jammed, can be recognized immediately. If too many Kanban cards are assigned to one person, the system has to be improved and the tasks have to be redistributed.

### Task management with Kanban

Another advantage of Kanban is that it can easily be combined with classical project management methods such as Gantt planning and that tasks can be managed agilely in any project.  After all, every project has tasks, regardless of whether you plan it agilely or classically. In order to manage tasks with Kanban, a backlog must first be created. Strictly speaking, a backlog is a list of requirements that are placed on the project. Since Kanban was originally developed for automotive manufacturing, these requirements usually consist of a list of functions that the (intermediate) product should have. If this is transferred to general project work, it can also be a to-do list or task list.

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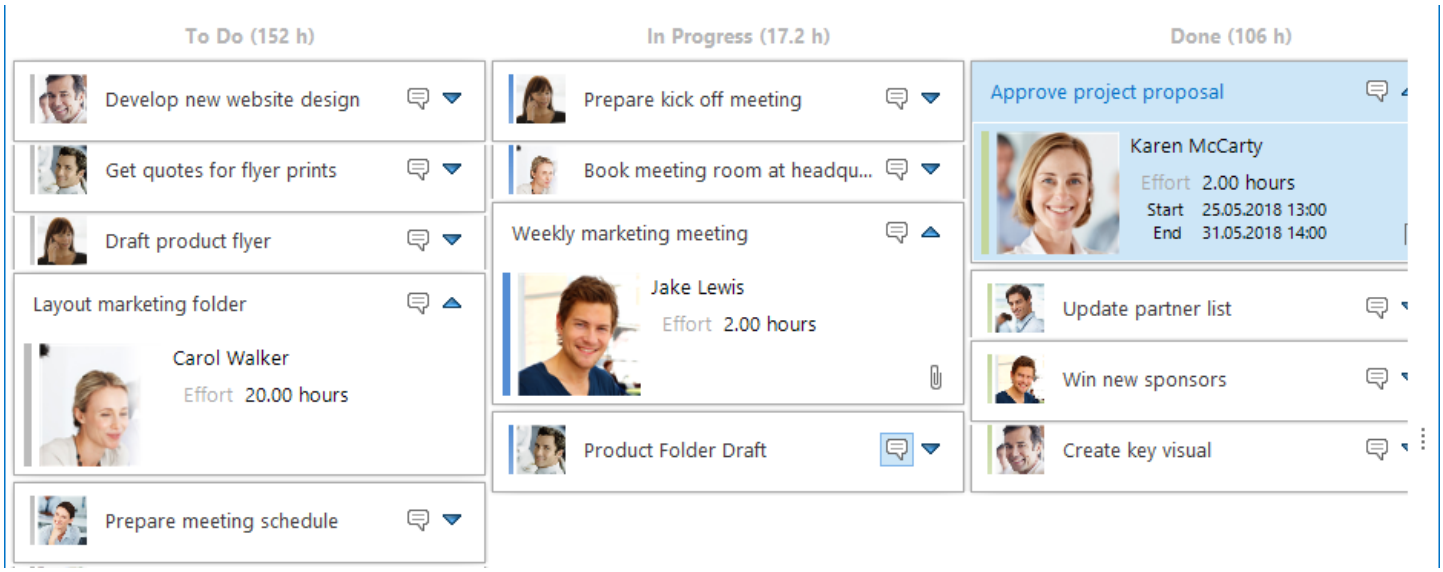
After the backlog has been created, it must be prioritized. This is done via the kanban board. Here all tasks are moved to the left column (To Do) and according to the pull-system the employees take the tasks from the backlog themselves. This requires a high degree of autonomy and self-organisation by the employees, but it also has a positive impact on their motivation. As mentioned above, the number of tasks an employee can perform should be limited to avoid bottlenecks.

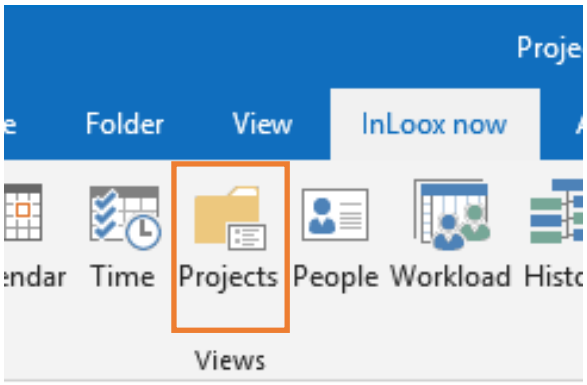


# 3. Agile task management with InLoox

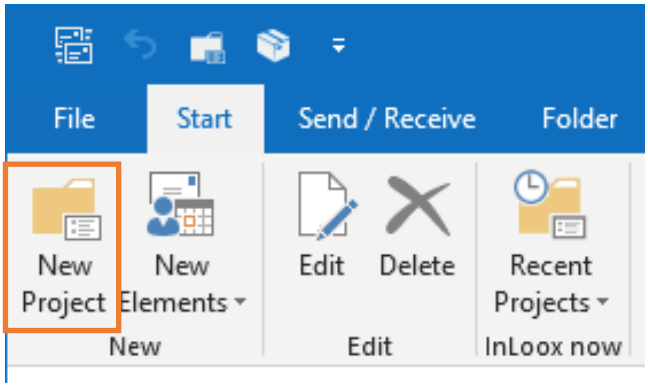
Agile task management has the advantage that the project team can select and divide their tasks themselves. In this chapter we will show you how you can easily plan and manage project tasks agilely in InLoox.

## Step 1: Create a new project

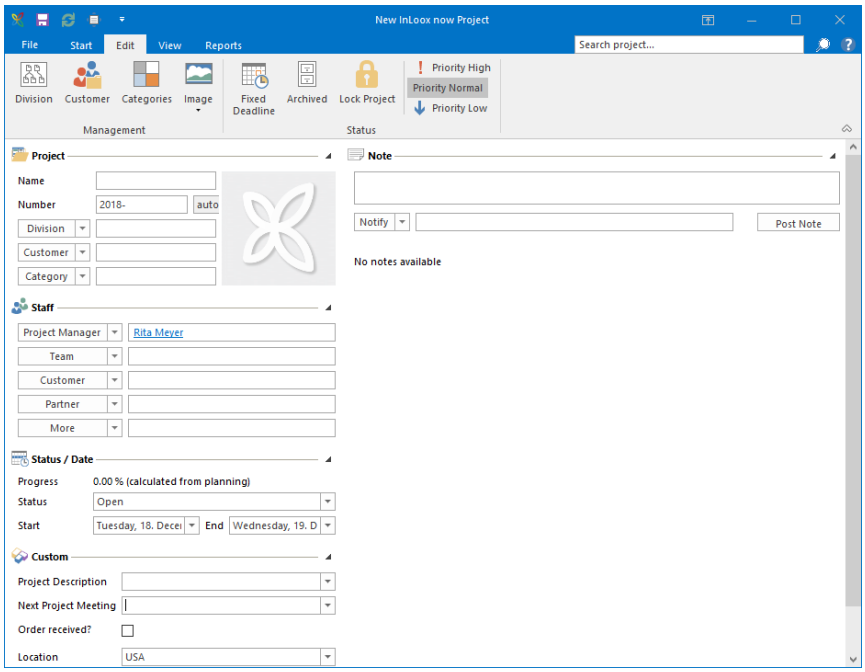
1. Open InLoox by clicking on the tab **INLOOX PM** bzw. **INLOOX NOW** in your Outlook.



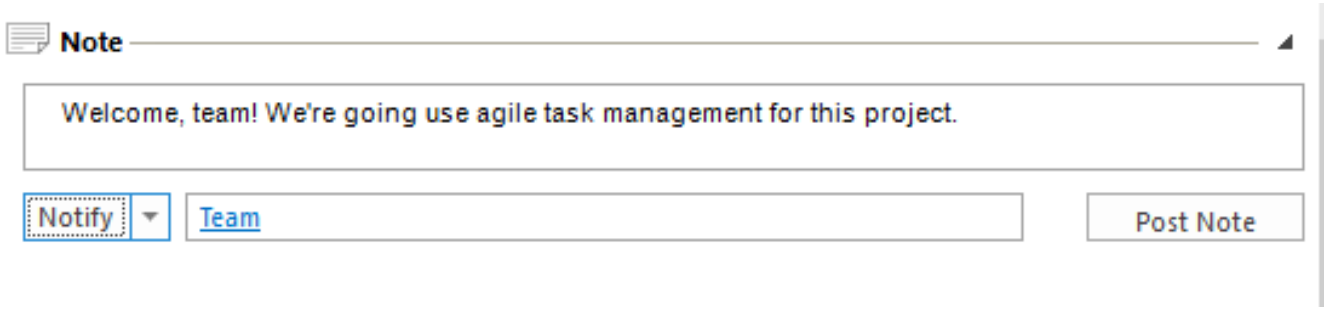

2. Open **Projects** and select **New Project**.



3. Fill in the relevant fields on the **Manage** page:

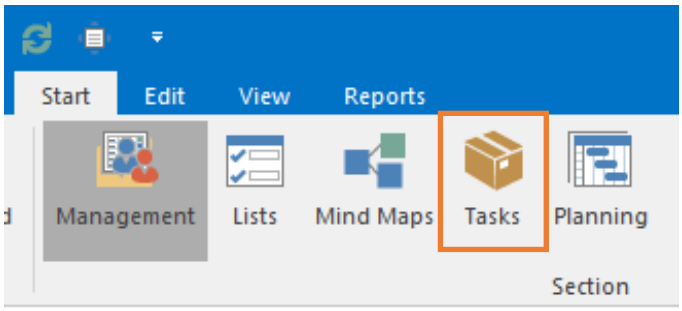



- Project name
- Project nummer (is created automatically)
- Department
- Customer, z.B. new customer, internal etc.
- Category
- Team: Project manager, team, customer…
- Project status and start/end date
- Project notes: Project manager can use notes to communicate important information to their team. The team can in turn use the notes to post questions relevant to everyone. Everyone on the project can use the notes and comment on information or answer questions.



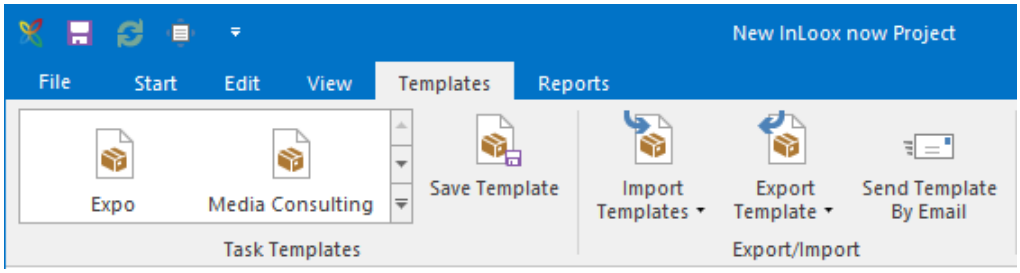
## Step 2: Create new tasks

1. In your project, navigate to **Tasks**.

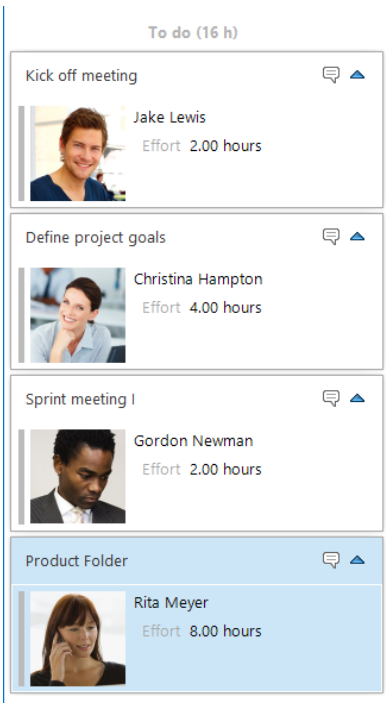


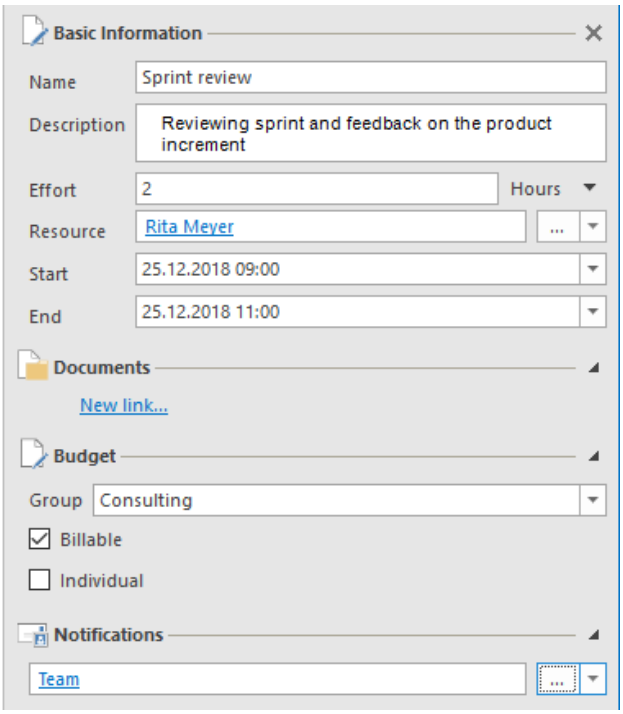

The Kanban board opens with three predefined columns **To Do**, **In Progress** and **Done**.

2. Create a new task by clicking **New** in the ribbon or use the shortcut CMD+N. You can also import a template with tasks.




3. New tasks are sorted into the leftmost column as To Dos. This is your product backlog. For a light version of agile task management, fill in relevant information e.g. effort, and assign a resource.



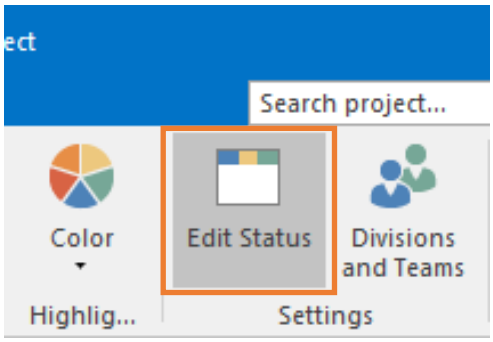



! If you want to bring even more agility into your task management, leave all fields empty except for the name of the task. The team members can, similar to a ticket system, then drag the task and assign the task to themselves.

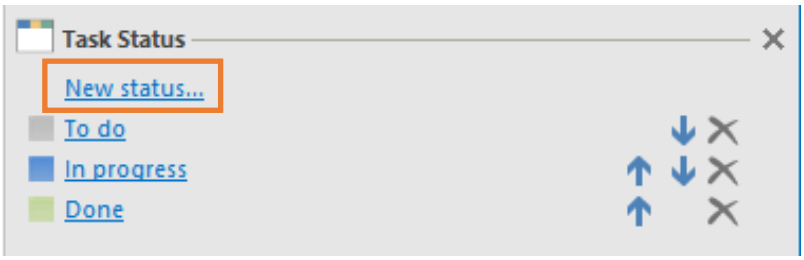
## Step 3: Working with the Kanban board

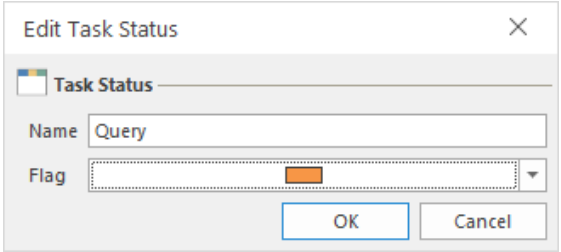
In classic Kanban, there are only the three columns To Do, In Progress and Done. However, you can of course define further columns, for example, if there are still some tasks that are unclear and consultation is required. You can define a new status for such cases:

1. Click on **Edit Status** in the ribbon:



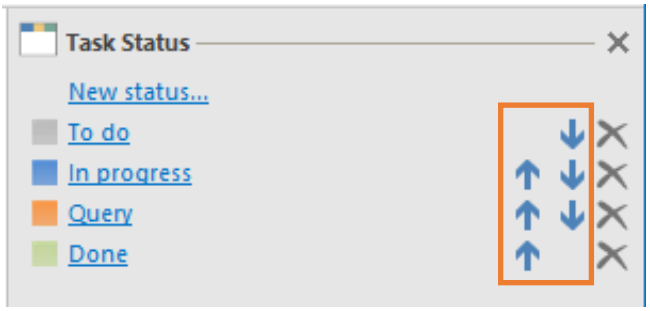

2. In the sidepanel you see the status settings. Click on **New Status** and enter the name for the new column.

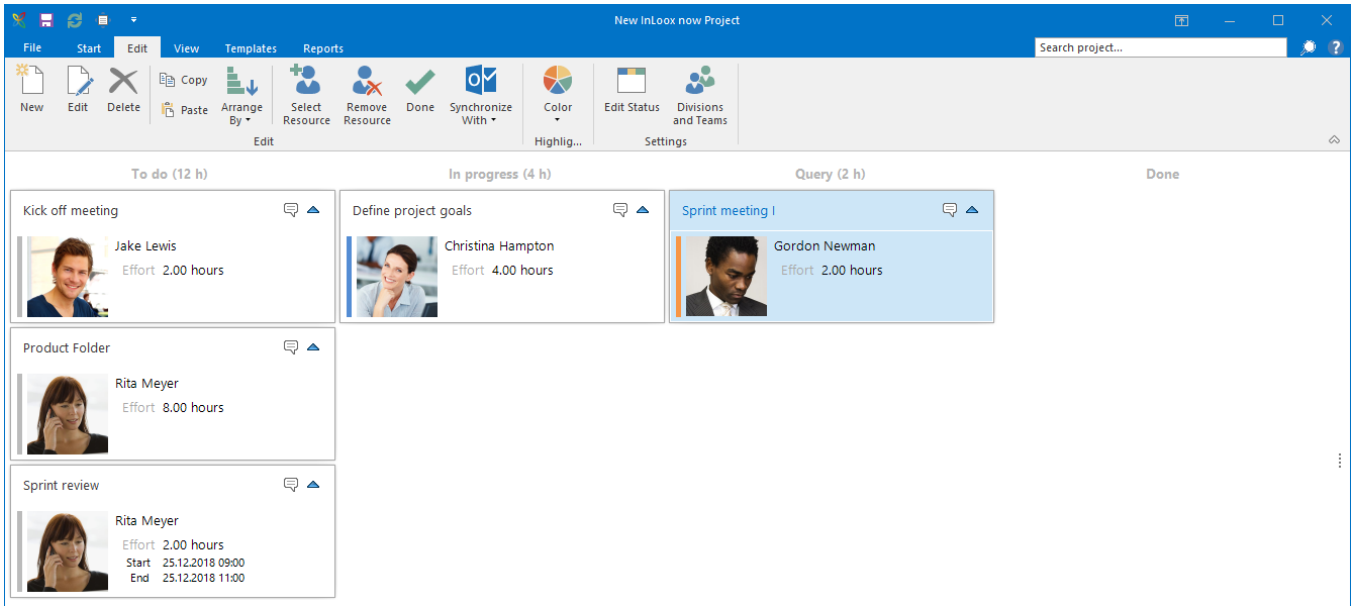



3. The new status automatically appears at the bottom of the task status list. Change the order of the columns with the arrows, if necessary, and select a color for the new column.

The rightmost column is always the „Done“ column, no matter what you call it. So, if you need to add e.g. a column for Sprint Review, move that column up by clicking on the arrows.



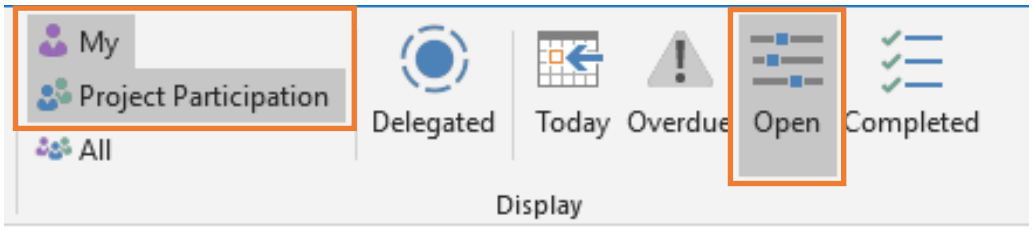



# Step 4: The multi-project task list

## Working with the task list

The task list is particularly interesting for Product Owners as it gives them a multi-project overview of all tasks. But the task list is also important for team members because they can easily select the project tasks they want to work on:

1. Open the task list in InLoox by clicking on **INLOOX NOW/INLOOX PM** and **Tasks**
2. Use the filter options in the ribbon to display every task of those projects you are involved in. Select **Mine**, **Project Participation** and **Open**:

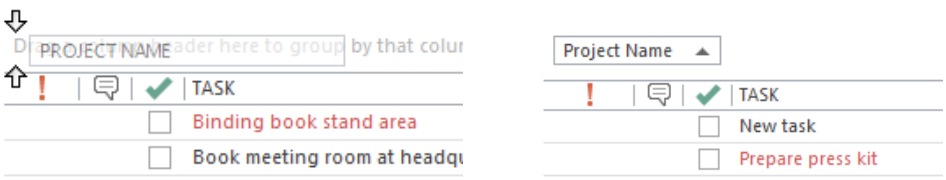



3. You can also sort and group the task list according to your needs.




### Grouping the task list

If you want to group the task list, simply drag the corresponding field into the area above the task list. For example, if you want the tasks to be listed by project, drag the **PROJECT NAME** field to the bar:

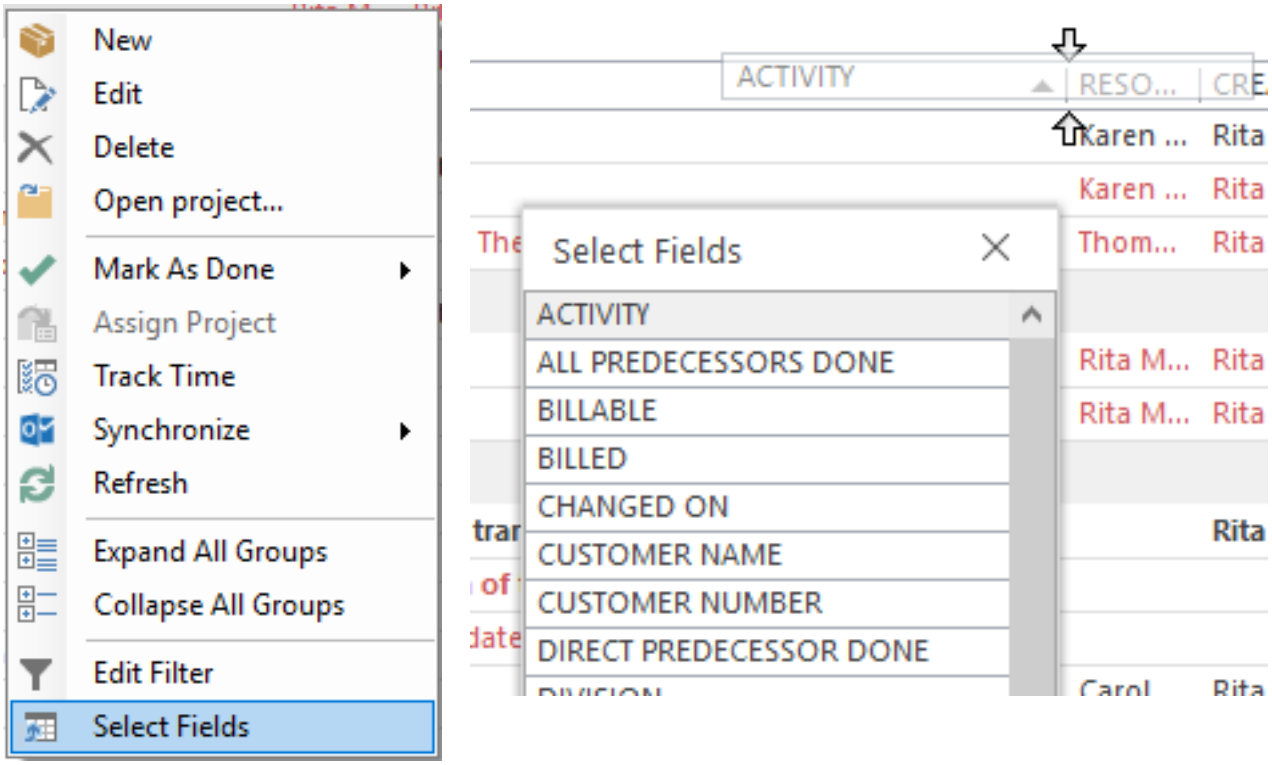


### Sorting the task list

You can also sort the task list by clicking on the column header by which you want to sort. If you click again, the sort order changes.

### Adding fields as columns

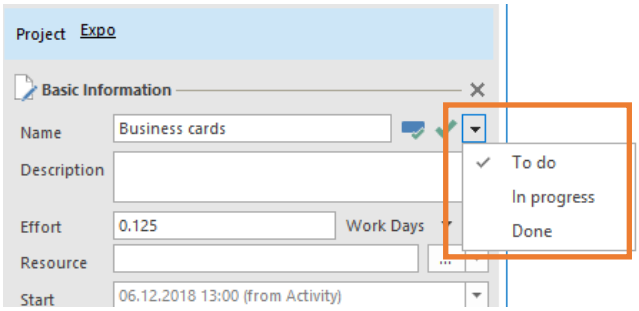
The task list provides you with a wide range of information. You can easily display or hide this information using table columns. To add a new field as a column, right-click to open the context menu and select **Select Fields**.



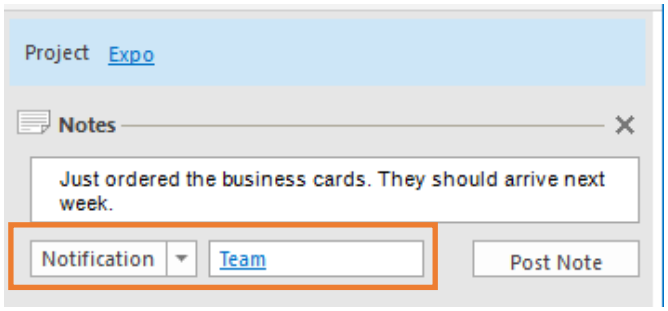

To select a field, simply drag it to the column headers. If you want to hide a column, simply drag it out of the task list. For example, the OVERDUE field is interesting for the Product Owner because it allows him to see immediately which tasks are overdue and whether it is necessary to redistribute them.

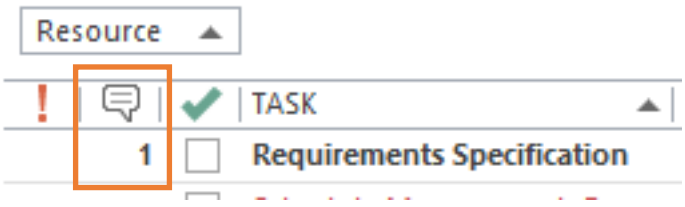
## Task notes

You can also edit the tasks you created in the project in the **Task View**. To do this, double-click a task with the left mouse button. In the side panel that opens, you can edit the task as usual. You can also edit the status of the task and change it to e.g. In Progress or leave a task note.



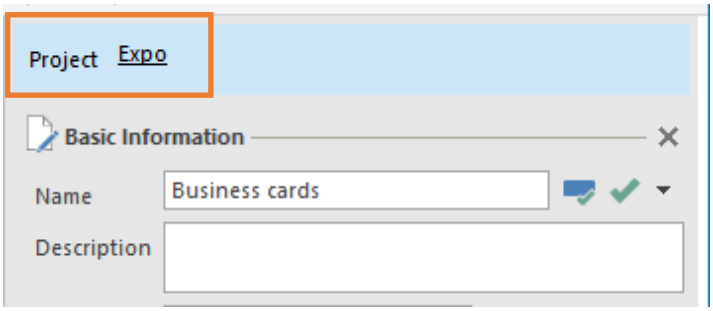

You can specify that all team members are notified of the new task note. The team will then see a notification of unread messages next to the task in the task list.




As with project notes, you should motivate all team members to answer questions and comments. This encourages self-organization and increases the effectiveness of team communication.

Often the question is asked why there is not a kanban board that displays all cross-project tasks. There is a very simple reason for this: It would be far too confusing. Project managers and team members usually work on more than one project, often in parallel. The goal of Kanban is to quickly get an overview of the tasks in the specific project in order to easily identify bottlenecks. But if all tasks of all projects are displayed, this is not possible. However, it is possible to quickly switch from the multi-project task list to the kanban view of the respective project:

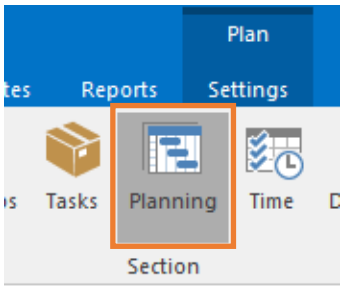



1. Double-click a task in the list to open the task details in the side panel.
2. If it is a project task, you see the assigned project at the top of the side panel. Click on it and the project opens with the task highlighted in the project kanban board.

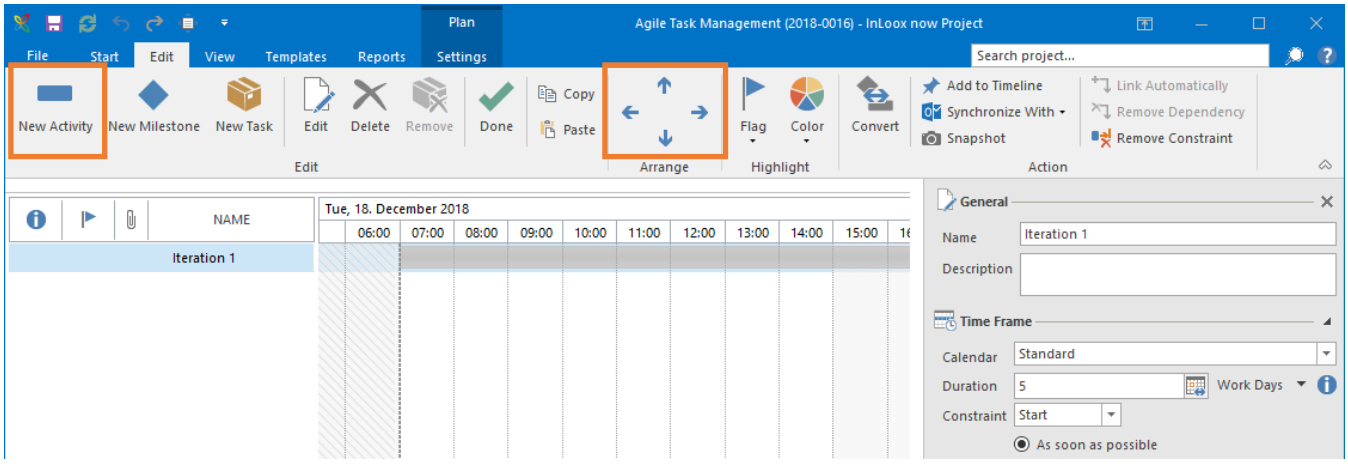
## Step 5: Plan a sprint

Now that you have planned your tasks agilely, you can include them in your project planning. With the Gantt diagram, you can not only map a waterfall plan, but also, for example, display a Scrum Sprint.

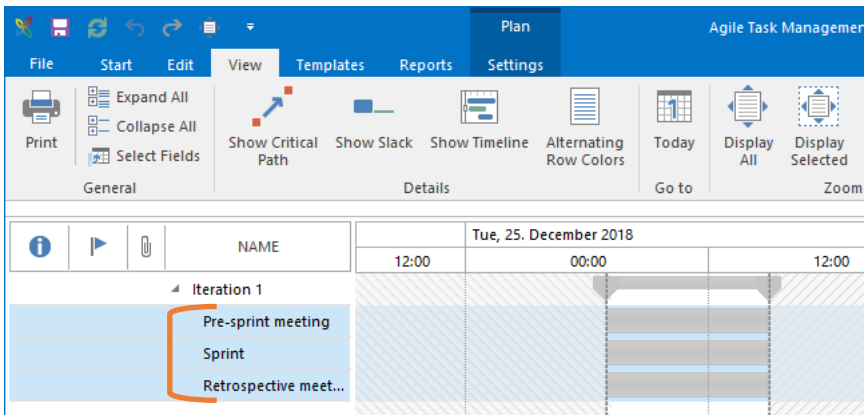
1. Open the **Planning** of the project.



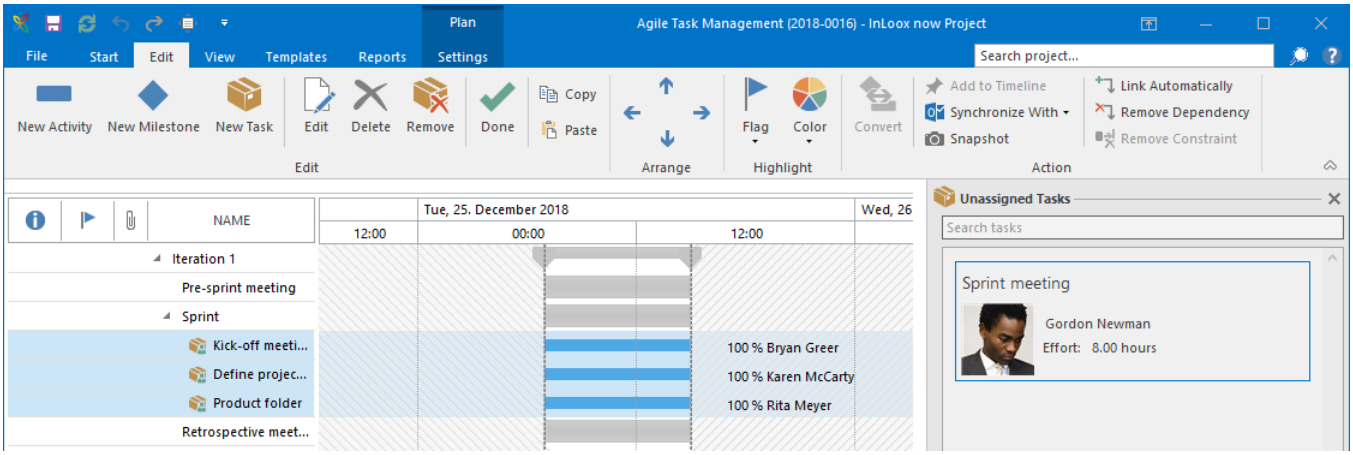

2. Create an activity that will become the Scrum iteration (or summary activity) for your sprint.




3. Now create further activities with **CMD+N** e. g. Sprint Planning, Sprint, and Retrospective and assign to the Iteration by indenting the activities with the right-pointing arrow in the ribbon.



4. Assign the tasks from the product backlog to the respective sprint. To do this, double-click on sprint to open the side panel that contains all tasks that have not yet been assigned. These are the tasks that have already been created in the kanban or task list, but have not yet been assigned to a sprint. Assign a task to the sprint by dragging and dropping it into the plan.




The start and end date for the completion of the tasks is automatically defined by the sprint. For this reason, the agile method often does not define start and end dates for tasks; these are determined by the runtime of the sprint.

5. Repeat steps 1–4 for the rest of the sprints.

# About InLoox

InLoox was founded in 1999 and develops project management solutions integrated in Microsoft Outlook that simplify and accelerate business processes. The convenient Outlook integration makes InLoox the central platform for project and day-to-day business. Its ease of use makes everyday work easier and project managers, teams and decision-makers can rely on InLoox's powerful planning, controlling and monitoring functions - on the desktop, on the web and on their smartphones.

More than 60,000 users in over 65 countries trust InLoox. InLoox customers include AVIS, CHRIST Wash Systems, German Red Cross, LIEBHERR, Novartis, Pentax Europe, STOROpack, SEAT, Siemens, US Airways, Verizon and many more. InLoox is based in Munich, Germany and has offices in San Francisco, USA and Stans, Switzerland.

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