On-Schedule Project Delivery with InLoox

[Part 1]



An InLoox Whitepaper

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On-Schedule—What's that?

This is not meant as an ironic question, but to draw attention to one of the most fundamental conflicts in project management: the conflict between the scope of the project, the project budget and the project timeframe. Known as the Project Triangle, often referred to as the Triple Constraint, scope, budget and time are the parameters that need to be monitored throughout the project lifecycle. The trick is to define all three parameters while taking the project environment into account so that none is exceeded.

When it comes to on-time project management, the focus is on the time parameter. When something is completed on-time, it generally means the "timely fulfillment of a plan". Since in project management the project is only regarded as successfully completed if

- the defined project scope was delivered,
- the required quality was met,
- and the defined budget was not exceeded,

on-schedule delivery cannot simply be regarded as the completion of the tasks defined in the project schedule by the specified deadline. It therefore makes sense to see adherence to schedules in the context of project success.

> *In summary, a project can be considered as completed on schedule if it is delivered within the defined scope and budget agreed between the client and the contractor, meets the quality requirements, and is accepted by the client on the agreed deadline.*

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How to increase on-schedule deliverability?

If your goal is to increase adherence to schedules in your projects, you should start with an analysis of past projects that have not been completed on schedule.

Analyze the status-quo

What has led to projects not being completed within the agreed timeframe?

Frequent reasons are:

- Project scope was not defined or insufficiently defined.
- Efforts were calculated too tightly or underestimated if, for example, no previous values were available.
- The budget was calculated too tightly, which meant that the scope could either not be fully met or could not be met within the specified time.
- Changes in requirements during the course of the project led to higher effort and/or higher costs.
- Bottlenecks in resources (materials, equipment, services) or project staff or service providers.

In most cases, a combination of these factors leads to the fact that a project cannot be completed on schedule.

Getting these factors under control

No matter which project management method – agile, classic, hybrid – is used and which standards you (must) follow, many tools are available. These can be used, for example, for better planning or better controlling, monitoring and reporting in order to increase adherence to schedules from project to project.

- Phase-milestone planning
- Resource planning
- Milestone and cost trend analysis

A central strength of InLoox is project and resource planning, as well as reporting capabilities. The three areas mentioned above contain many small, but very helpful features that help you achieve your goal of increasing adherence to schedules.

In this first part about on-schedule project delivery, we focus on the first aspect: planning.



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Tactic No 1: better planning

With InLoox, you can create a phase-milestone planning including links (dependencies) and constraints in the Gantt chart. You can watch a detailed video tutorial on how to do this.

Once you have created the planning with activities (phases) and milestones, InLoox offers three features that are very helpful:

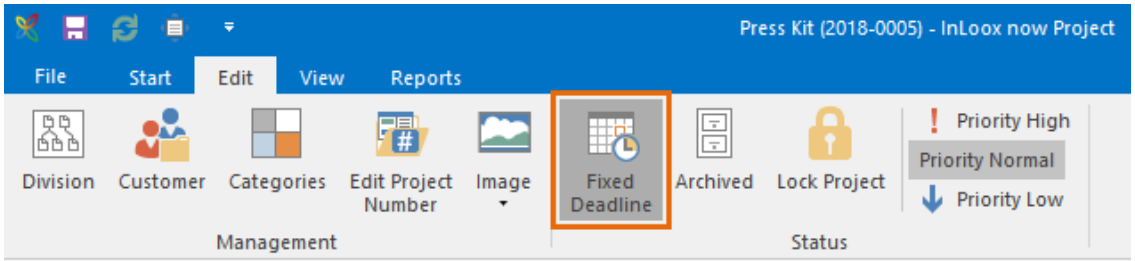
Fixed Deadline **Critical Path** **Snapshot**

Fixed Deadline—Visualize scheduling delays in the Gantt chart

The *Fixed Deadline* feature highlights all planning elements (activities, summary activities, milestones) that exceed the project end date specified on the management page in a red shaded field in the Gantt chart.

In the Gantt chart, this is a way to visualize delays that jeopardize meeting the deadline. It is best to activate this feature right from the start. This enables you to keep an eye on the effects of delays from the outset and to identify at an early stage which critical phases or milestones require special attention.

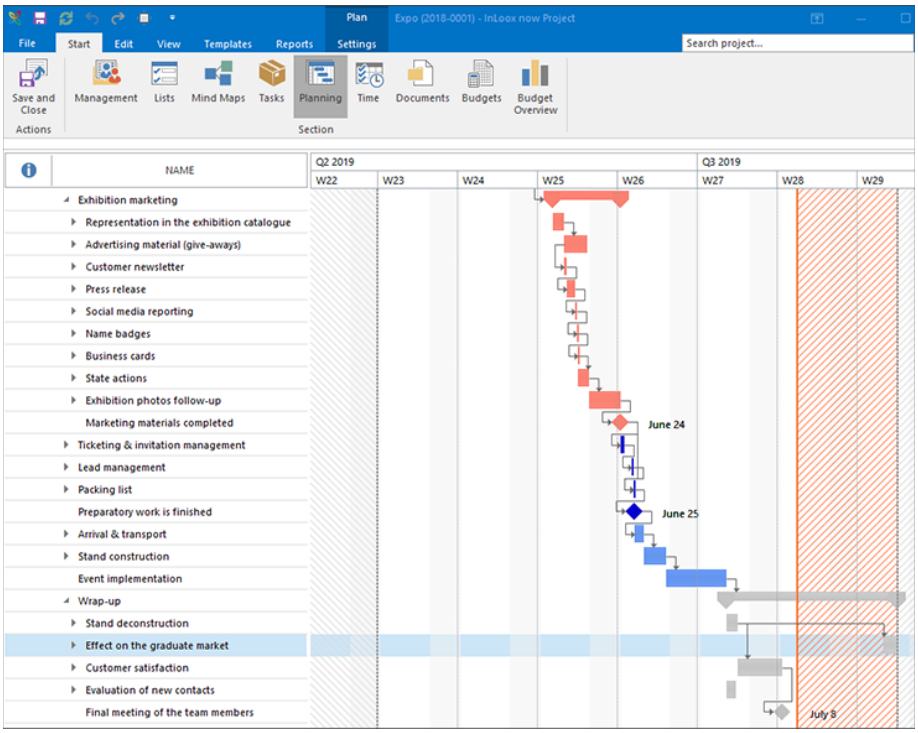
1. Open Outlook and click on the **InLoox** tab and then on **Projects**.
2. Create a new InLoox project by clicking on **New Project** in the **Start** tab (or open an existing project).
3. On the **Management** page, in the **Edit** tab, activate **Fixed Deadline**.



4. Now create the activities and milestones of the project in **Planning** in the Gantt chart and set dependencies where necessary.

If you now postpone or extend a planning element so that this or subsequent elements cause delays that move the end date beyond the specified deadline, a red hatched area appears in the Gantt chart showing all elements that jeopardize on-schedule completion.

Watch the video tutorial on how to enable the fixed deadlines feature in the project.



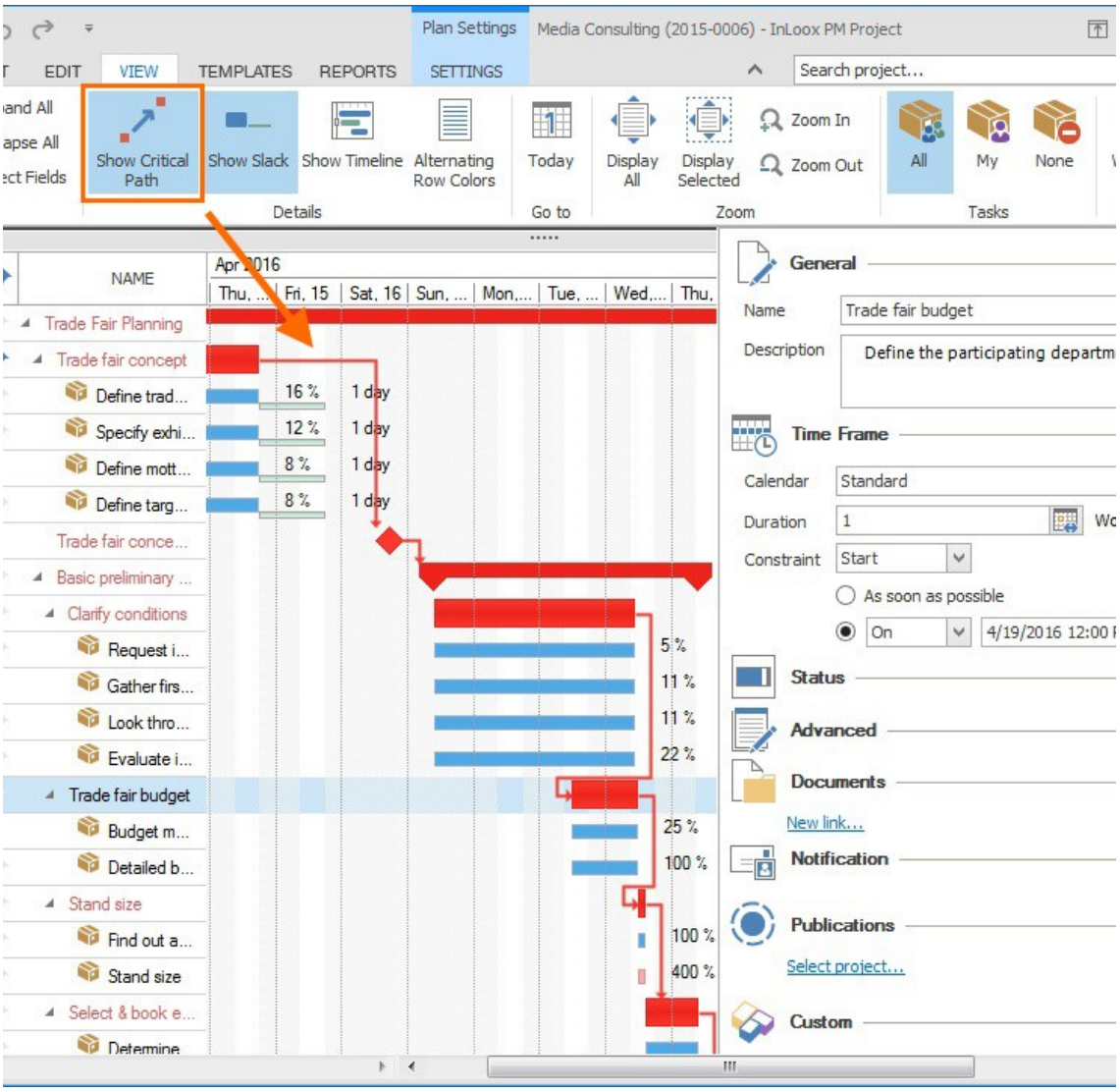
Crititcal Path—Your reliable way through the plan

The Critical Path visualizes those planning elements in the Gantt chart that do not have any time margin and that jeopardize the planned project duration if delayed. In contrast to the fixed deadline feature, which only visualizes a delay when it has already occurred, the critical path helps you to identify those phases and milestones that must not be delayed right from the start.

1. Open Outlook and click on the **InLoox** tab and then on **Projects**.
2. Create a new InLoox project by clicking on **New Project** in the **Start** tab (or open an existing project).

3. Click on **Planning** to create the activities and milestones of the project planning in the Gantt chart and set dependencies.

4. In the **View** tab, select **Show Critical Path**. In the Gantt chart, the elements along the Critical Path are displayed in red, the elements outside the Critical Path are displayed in gray.



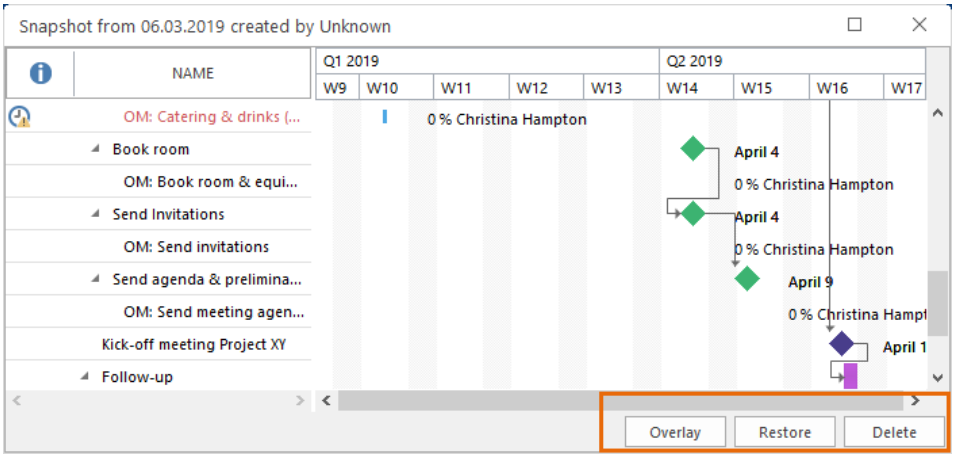
To ensure that the critical path is meaningful and reliable, you must set the dependencies between related planning elements correctly.

Read this article on how to easily link planning elements.

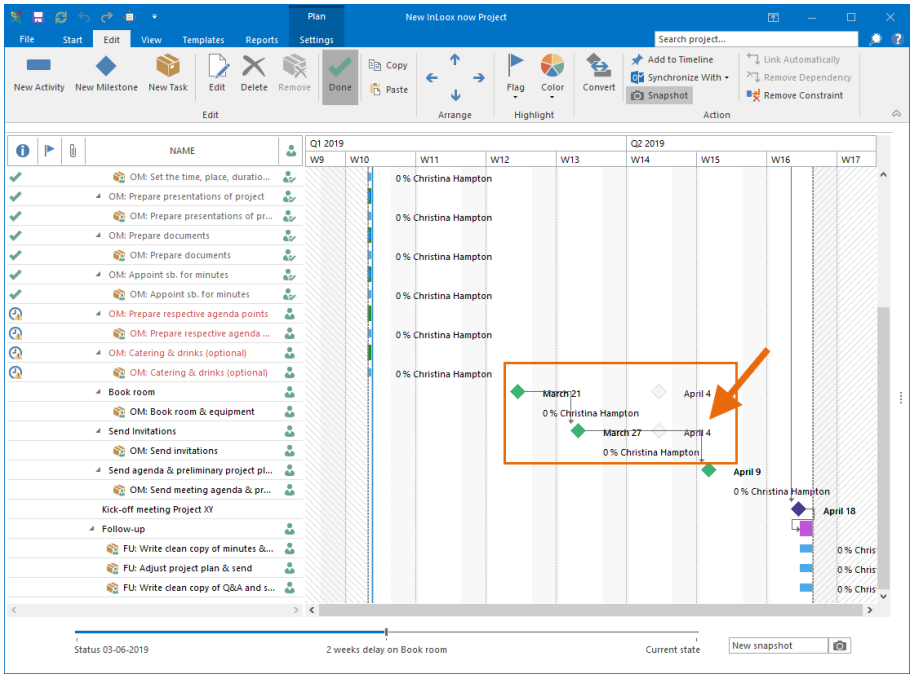
Snapshot—Simulate and visualize delays

The snapshot feature is almost a secret weapon in InLoox planning. When it comes to meeting deadlines, it is particularly helpful for simulating the consequences of delays.
If you want to see the effect of extending a phase, or shifting a milestone by a few days, on the rest of the planning, first take a snapshot of the current state of the planning. Then edit the plan and take a second snapshot of the edited state.

1. Open a project's **Planning** tab, and on the **Edit** tab, under **Action**, click **Snapshot**. The Snapshot bar appears below the Gantt chart.
2. Click in the New Snapshot field on the right, enter a name, e.g. "Current Status + Date" and click on the camera icon. The snapshot will be taken.
3. Now edit the planning and, for instance, extend the duration of the a planning phase or postpone a milestone by a few days.



4. If you now move the mouse over the first snapshot, a window opens with the commands **Overlay**, **Restore** and **Delete**.



5. Click **Overlay** to superimpose the two states and visualize the effects of extended phases or postponed milestones. In this case, a delay of the milestone Book room by 2 weeks causes the dependent milestone Send invitations to be delayed by 6 work days.

The big advantage: You can restore any condition. You can restore the current status from the first snapshot as well as use the edited planning version as a new schedule.

- The snapshot feature is especially useful when you need to continuously adjust the schedule as changes occur. The snapshots of each state allow you to visualize the development and impact of these changes and see which delays have the greatest impact on subsequent elements.

- You can also use snapshots to document and illustrate how changes to individual phases affect the entire schedule and, of course, the project deadline. Especially in the course of a retrospective (Lessons Learned), such a visualization is helpful in order to be able to make better estimates regarding effort and realistic scheduling for similar, future projects.

Watch the planning snapshot video tutorial.

Outlook on part 2 of the series "On-Schedule Project Delivery with InLoox"

In the next part, we'll look at how transparent resource planning can help to increase on-time delivery in projects.

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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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