

A Beginner's Guide to

# Working with Schedulers



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# Introduction

The larger the project, the longer the list of tasks on your project schedule. However, even small projects can have schedules running into multiple screens: you find yourself paging down to move through the many activities for the team.

**Creating a tidy, effective schedule is essential to help teams do the right work at the right time.**

A good quality schedule can help you hit dates, communicate with your client, and capture adequate data for earned value management reporting. In fact, it might even be a compliance requirement for your contract.

At Ten Six, we know that many organizations don't have experienced in-house schedulers. You might be considering hiring a scheduling consultant or outsourcing your scheduling to an experienced expert. Right now, that feels like a big step. In this ebook we'll show you why outsourcing scheduling is often the very best thing to do.

## What does a scheduler do?

You might have heard stakeholders use 'plan' and 'schedule' as interchangeable terms that mean 'what we are doing and when we are doing it'. However, in terms of the job, the role of a scheduler is highly skilled and covers specific responsibilities.

### **The role of a scheduler**

Many people on a project team end up doing some kind of scheduling as part of their role. The project manager and team leaders, as well as individual team members, all have to schedule their own time and make decisions about what is going to happen when.

A skilled scheduler – someone for whom scheduling is their whole job, not part of it – will spend all day scheduling. Construction and engineering projects need someone dedicated to managing this aspect of the project because of the constant requirements for people and materials to be in the right place at the right time.



The scheduler designs and implements scheduling systems. They will typically be in charge of setting up and configuring the scheduling tools for one or more projects or programs, and documenting how the set-up has been achieved. They understand and use scheduling techniques including:

- Critical path scheduling
- Network development
- Forward and backward passes
- Forensic schedule analysis and delay analysis
- Float management
- Resource allocation and loading
- Vertical and horizontal integration.

If your team uses earned value management environment, the scheduler also has the job of creating and maintaining the integrated master schedule (IMS).

The scheduler's work creates data for progress reporting to track project performance. The scheduler's inputs feed the performance management analysis and provide the team with fact-based data for decision-making. These metrics are used to analyze cost, schedule and technical performance.

Schedulers are power users of tool suites like Primavera P6 Professional, and experts at being able to set up task relationships, leads and lags, constraints and calendars so the underlying logic of the schedule holds true.

As well as creating the schedule, the scheduler also manages it day-to-day. That involves finding out what is actually going on and using that information to update the schedule. Overruns are recorded, but schedulers also look for ways to better balance time and resource to be more efficient. A good scheduler can see how the work fits together and can identify where improvements could be made for efficiency.

# 6 Benefits from using experienced schedulers

As we've seen, there is a lot that goes into the scheduling role, but the benefits to the organization are clear. Here is what a skilled scheduler can offer your organization.

## 1. Support compliance requirements

Experienced schedulers are familiar with the requirements for creating and maintaining robust schedules. For example, they'll be familiar with the requirements for US Government contracts and specific compliance requirements like those mandated by the US Army Corp of Engineers or those required for contracts using earned value management techniques.

They know what is needed to build and maintain a schedule that ticks all the boxes. As a subject matter expert, they'll often get involved in other aspects of compliance, like documenting processes or writing up procedures to meet the requirements.

Compliance is not a one-and-done activity. Schedulers freely share their knowledge of standards like the DCMA's 14 point schedule assessment to allow for continuous process improvement for the data architecture, processes and systems in use to ensure ongoing compliance.

## 2. WBS creation

Scheduling is a discipline that requires input from many other teams, so schedulers have the skills to work across the organization. They gather information and updates from many individuals and departments. For example, they will work with finance teams, project controls, the Project Management Office and team leaders.

Experienced schedule consultants lead the development and creation of a work breakdown structure (WBS) that meets WBS guidelines. These guidelines might be mandated by your contract – and even if they aren't, it's worth following good practice. A scheduler may work alongside the project manager for this, but it's also common for them to manage the process of defining work packages and setting up control accounts with the relevant teams.



### **3. Create and maintain the schedule**

Once the WBS, work packages and control accounts are set up, the scheduler can begin creating the master schedule.

This is more than typing in tasks and creating a basic Gantt chart. A compliant plan requires a structured approach to coding. There are many complex elements to input for each task to ensure they can be tracked and managed appropriately.

Once the schedule is set up, it has to be maintained. The scheduler is responsible for putting a change control process in place. They write the standards for updating the schedule, ensure those standards are maintained by the whole team, and elicit information to keep it up-to-date.

### **4. Manage schedule risk**

Schedulers contribute to project risk management by keeping the focus on schedule risks. That includes the risk of delays, supplier issues, resourcing and more. As they have a detailed knowledge of how the work is unfolding, they are uniquely placed to advise on schedule risk.

They also conduct schedule risk assessments as required, following a standard approach so the process can be repeated.

## 5. Reporting

Progress and risks are reported regularly, so another role of the scheduler on a project or program is to make sure reporting processes are set up and followed. This includes reports for internal use and those that go to the client. There could be any number of reports required to meet the project's requirements and the client's expectations.

Scheduling tools can be programmed to run many reports automatically, so schedulers set these up within the software, test them and create any workflows required for approval and issue. Where schedule data is required for other reports, the scheduling expert supports the integration between software tools like Oracle Primavera P6 and Deltek. They run tests to check the data integrity is maintained when data moves between tools.

## 6. Work with project controls

Schedulers work with their colleagues in project controls as required. For example, they may advise on how to share schedule information with third parties, or what EVM system requirements are expected from suppliers to maintain the integrity of the system. They might get involved with quality reviews on sub-contractors' schedules.

The role of the scheduling consultant is broad, but also deep. People in this role need experience working with the technology so they are comfortable with the features of advanced tools like the Oracle suite. They need to be happy working with stakeholders at all levels and prepared to stand by what should be done to maintain compliance.



**Having someone on the team who can answer questions about the ‘what’ and ‘why’ of scheduling and drive the tools to get the right result from the system is a huge asset. Expert planners save you time and get you to a compliant situation faster.**

But what if you don't have anyone in-house who can fill this role?

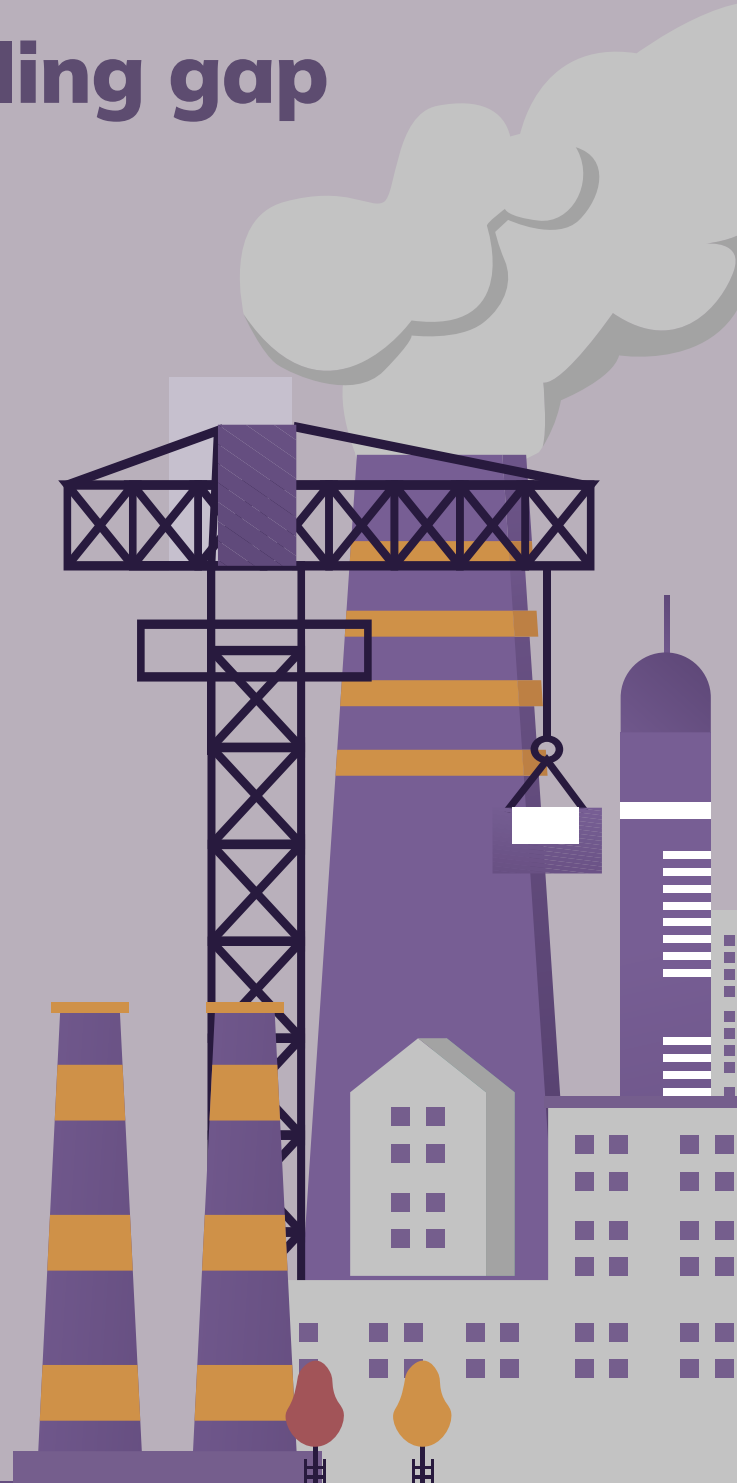
## Filling the scheduling gap

Don't let a lack of in-house project schedulers stop you from bidding for contracts you know you can deliver. If your business is the right fit for the work, schedule analysis, design and creation is the easy part!

You could recruit an experienced, competent Primavera P6 scheduler to sit alongside your team. But it can be tough to find skilled resources willing to take temporary roles for an individual contract.

You could train someone from your existing staff. But then you'd have to recruit to replace them, and you might not have anyone willing to shift from their role into the team's scheduling expert anyway.

A better solution is to **work with a professional partner** who will build and maintain your project schedule for you. Expert contractors can even maintain the schedule when things change and create the reports for you, so you don't need to worry about anything.





# The advantages of outsourcing project scheduling

There are many benefits to working with schedule consultants. Here are the top advantages we see from our clients.

## 1. Focus on what you are good at

You know how to deliver a great service to clients. If spending time wrangling with Primavera isn't top of your team's core competencies, then let them get on with excelling in other areas. They can focus on working on the project while we work our magic in the scheduling software.

Use your resources in the most appropriate way: there's no need to train up staff when you only have a few projects a year that require this detailed level of project scheduling to assure compliance.

## 2. Achieve compliance easily

Does the contract require a compliant earned value management system? Don't let that put you off moving forward with the bid. You can outsource the effort to experts who can get it finished quickly and efficiently.

You'll tick every box and meet every requirement because our experienced schedulers know exactly how to deliver compliant project controls using industry best practice techniques.

All the reports you need are created for you to forward on to the relevant parties, and we'll maintain the schedule so it's always up to date.

## 3. Improve project success rates

OK, let's be realistic for a moment. Simply having a great schedule isn't going to improve your project success rates. At its most basic, a schedule is a guide for what work needs to happen. You then have to do the work that is documented in the schedule, and manage the activities appropriately.

However, managing the work, tracking progress and ensuring everything continues to plan is a lot easier when your schedule gives you the exact path to take.

**A quality schedule is more than a roadmap; it's a detailed GPS that guides you every step of the way and highlights when you are off track.**

Detailed schedule risk analysis helps you achieve your goals, because you can predict problems before they happen and fix the root cause.

When your schedule is that good, you'll be able to make better decisions because you'll always have access to robust and professional scheduling information. Rather than spend a lot of time at the keyboard, let your experienced team get out and do their jobs while our schedulers create a plan that will let everyone hit the important dates.

#### **4. Boost customer satisfaction**

Your clients expect you to be able to keep control of the work and evidence that things are moving in the right direction. The questions we get asked the most are:

**How much will it cost?**

**When will it be done?**

That's what customers really want to know, and a robust schedule will tell them that.

When you add expertise to your team, you can show clients you are using best-in-class scheduling techniques for better outcomes.

#### **5. Lower project costs**

Your part in the project may only represent a single workstream or work package, but we bet that the overall program is an expensive business. Government contracts, for example, can reach into the billions of dollars.

A professionally-built and executed schedule helps lower project costs because resources are allocated efficiently. Plus, in-house costs are lowered because there is no overhead for training staff. Scheduling goes from being a time-consuming overhead to something fast and accurate.

# When to outsource project scheduling



Is it the right time for you to consider working with schedule consultants? Below, we outline five common situations where our clients opt to bring in external support for project scheduling.

## **1. You have just won a new project and need to rapidly ramp up your project team**

You've just won a new contract? Now you need to get people into post quickly and start showing that the client has made the right choice in securing your services for the work.

But what if you are already fully-staffed on other projects and don't have the capacity to redeploy people to this piece of work at the moment?

If you want to ramp up your project team with minimal effort, bringing in skilled contractors to do particular roles is a fast way to get started. An experienced scheduler can create a reliable, robust schedule for you, then train an in-house employee on how to maintain it going forward. Or they can continue working with you for as many hours per week as required to manage, update and control the schedule for the life of the project.

## **2. You are looking for short-term project support that doesn't warrant a full-time hire**

Some projects simply don't warrant a full-time hire. If it's a small project, or a short-term engagement, you don't necessarily want to add an additional person to your staff. Especially if you are not sure if you will have work for them after this project ends. Specialists can be expensive, so they are typically not the kind of resource you want on the bench waiting for the next engagement.

An alternative is to hire a fixed-term contractor for the duration of the engagement, or for a time period that suits you. They can hand over to someone internally if that makes sense, or continue to monitor and control the schedule for you, putting in the time required without necessarily being full-time.

Temporary scheduling resource allows you to be flexible without committing you to having a new person on staff longer term.

## **3. You have corporate moratoriums on increasing full-time headcount**

Let's face it, sometimes you want a full-time employee but for whatever reason there is no option to secure someone. We know you have to work within the constraints of your organization.

Until you can secure permission to recruit for a permanent role, the project resource budget could be used to staff the project controls and scheduling function with a reliable, experienced contractor who can hit the ground running.

## **4. You don't have the bandwidth to go through the recruitment, induction and training processes**

Outsourcing really comes into its own when you are tight for time. If you don't have the capacity to go through a lengthy hiring process – only to find that the person isn't a good fit – then outsourcing is a fast alternative to secure resources for your team.

You get experts on hand when you need them, and only when you need them. They integrate seamlessly into the team because that's what they do. They have experience working in industries like yours, so they bring best practices learned from real life and not textbooks.

Make a fast start, and when there is the time and desire to hire into the role, a consultant will complete a full handover and induction for your new starter for a smooth transition.

## **5. You have a skill gap in the team for Primavera P6 application or technical consultants**

Finally, while you might have brilliant people on the team, let's say this contract requires you to use Primavera P6 software, a technology that your existing schedulers are not experienced in. You could send them on Primavera training to build their skills, but that's only valuable in the long term if you expect to win more business that relies on Primavera scheduling. If you think upskilling them may not be the best use of their time – and there are other projects they are committed to that are using their skills – then you can outsource the Primavera P6 application work to experts who can do the tasks easily.

When you outsource project scheduling, you don't even need to provide the tech: there's no need to procure the tool or a licence, or go through the effort of setting it all up. We come with everything we need to provide a turnkey solution for Primavera P6 schedule creation and maintenance for your project, for as long as you need it.



# Your next steps

Ready to start working with professional schedulers?

We're ready to work with you.

Our contract schedulers integrate with your existing project and program team, taking responsibility for the scheduling aspects of the work. We support smaller businesses that cannot spin up a compliant Primavera P6 environment in time to meet their contractual responsibilities, and larger firms who simply need an extra pair of hands.

Our highly skilled team has real world scheduling expertise and a thorough knowledge of both Primavera P6 Professional and Primavera P6 EPPM. We are available to join your project team at the planning stage to help turn your scope and other project documentation into WBS Dictionaries and a well thought-out Primavera P6 schedule.

Whether you need a construction schedule, a plan for a defense project, other federal departments, utilities, engineering or R&D schedules, we've worked with many of the top firms nationally so we know what requirements to hit.

Our expert schedulers get up to speed quickly. They turn your project scope into a WBS dictionary and a schedule, ensuring it complies with any mandated contract requirements.

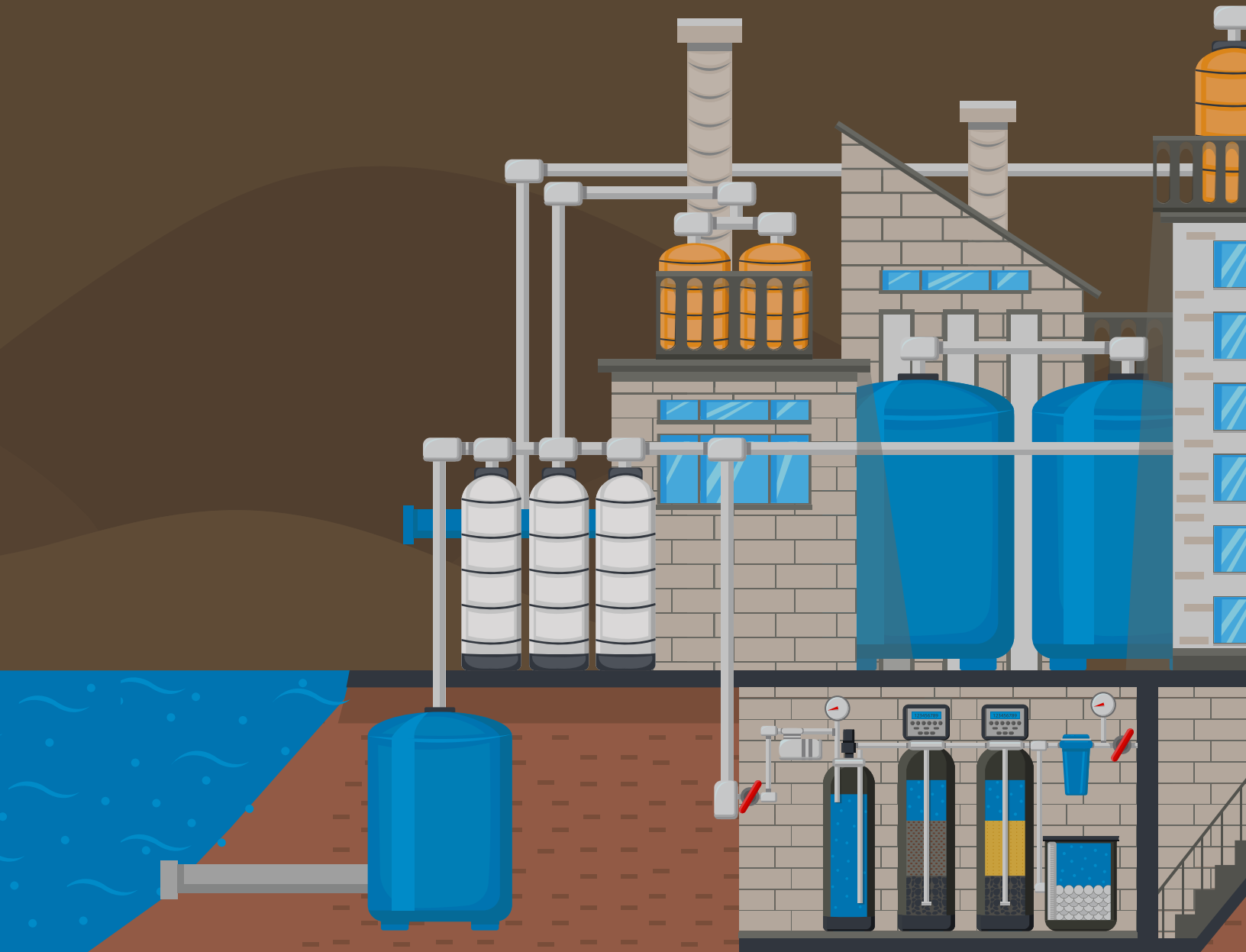
You can be confident knowing that:

- Your team can focus on delivering a good service to the client
- Reporting and scheduling are transparent and accurate
- Project performance data is robust
- Someone else is 'driving' the software to a high standard.

Contract schedulers provide a solution that covers building the schedule, maintenance, reporting and analysis. This service has worked for hundreds of our clients in the past, and we're sure it will work for you too.

Whatever route you choose to fill the scheduling function on your program, a good scheduler will help the team deliver a better project for your client and contribute to a more successful outcome for everyone involved.

Get in touch today and learn more about how we can support your project delivery goals.



# About Ten Six Consulting, LLC

Ten Six Consulting specializes in implementing Enterprise Project Management (EPM) and Earned Value Management (EVM) solutions. We are experts in implementing and training in tool suites from Oracle Primavera, Deltek Cobra and Acumen. Our consultants have successfully implemented these solutions in many industries, including Aerospace and Defense, IT, Media, Energy, Telecom, Public Sector and Finance.

Our proven structured approach enables us to apply best practices in implementing processes and tools throughout large organizations. This includes addressing cultural concerns, such as user adoption, as well as balancing the pace of an implementation to accommodate the organization's absorption rate.

We are experts in implementing and training in tool suites from Oracle Primavera, Deltek and Microsoft. We have unparalleled experience in successfully integrating these tools into client organizations, significantly improving their Project Management and Earned Value Management capabilities. Our uniquely developed training classes address user adoption challenges by combining both tool use and organizational process.

We understand what it takes to gain real user acceptance and adoption. We recognize the difference between a 'successful tool deployment' and accomplishing real change, with a system that is truly embedded within your organization.

We apply a focused, practical approach to our clients' implementations, an approach which is driven to achieve well-defined business benefits. We only deploy seasoned experts with years of experience, deep solution knowledge and a track record of success.

We combine this unique blend of rich capabilities, industry knowledge, solution knowledge and unparalleled delivery experience to provide real world results for our clients. Our collaborative approach and drive to exceed our clients' expectations helps our clients to rapidly focus, improve and succeed in project performance.

Ten Six partners with the industry leading software vendors and works closely with the project management community and standards organizations.