



On Time Delivery (OTD)

Objective

This instructional document is targeted to teach and guide users (PMs) through the functionality and entry of milestone dates in Clarity to measure On Time Delivery (OTD).



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P³MO Delivering Successful Portfolios, Program and Projects



Introductions

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The On-Time Delivery (OTD) functionality within Clarity provides a system for measuring our performance in meeting schedule commitments made for stage gates, go-lives and other major milestones to further enable continuous improvement.

Guidelines

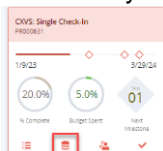
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- OTD applies to all projects prioritized within the Portfolio.
- At a minimum, entries are required for each Stage and at least one go-live.
- There should be an entry for each major go-live.
 - One entry with a date range if the same functionality is being deployed over time (e.g. store release, PEDs)
 - Separate entries for distinctly different functionality; each could be date ranges (e.g. PitPass' Store and Journey Tracker go-lives)
- Changing OTD Committed Dates
 - No change should occur until project leadership is in alignment and Project Change Request completed.
 - Committed Dates *may* be changed if the reason is business-driven (e.g. requirements brought forward late) or due to external factors (e.g. hardware delays).
 - Committed Dates are NOT to be changed if the reason is IT-driven (e.g. failure to identify and plan for cross dependencies or environment constraints; requirements missed during design; building an aggressive schedule (no float)).
 - Either way, the Committed Stage Finish Date on the Properties page should be updated

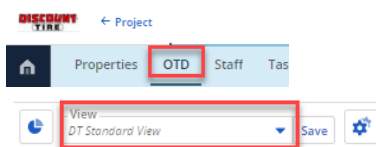
Fields & Functionality

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There are two ways to navigate to the OTD page for your Project:

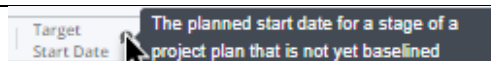


OR within your Project



When there, utilize the DT Standard View

Tool Tip pop-ups are provided on the column headers



Automatic Record Creation – based upon the lifecycle being used (DT vs DT-TR)

- Records are automatically created for each Stage and on Go-Live upon conversion from an Idea to a Project.
- A job runs daily to ensure the minimum required Stages are present and creates any missing records.

Validation Error	Name	Stage	Target Start Date	Target Finish Date	Committed Start Date	Committed Finish Date	Actual Start Date	Actual Finish Date	On Time Finish	Comments	Validation Message
<input type="checkbox"/>	Study	Study									
<input type="checkbox"/>	Research	Research									
<input type="checkbox"/>	Plan	Plan									
<input type="checkbox"/>	Implement	Implement									
<input type="checkbox"/>	Close	Close									
<input type="checkbox"/>	Go Live	Go Live									
<input type="checkbox"/>	Intake	Intake									

NOTE: No dates are required in the Intake OTD record. It is there for a future purpose.

Each OTD record contains the following fields:

- Name
- Stage (system populated)
- Comments
- Validation Error
- Target Start Date
- Committed Start Date
- Actual Start Date
- Validation Message

- Target Finish Date
- Committed Finish Date
- Actual Finish Date

See **Appendix A** for the definitions of each.

Date Validations are in place to ensure Finish Dates are *after* the associated Start Dates. If not, notification will appear in the Validation Error field and the reason will be in the Validation Message field.

TIP: You can check your dates by sorting on each start date field and reviewing the flow of the Stages and Go-Live.

Validation Error	Name	Stage	Target Start Date	Target Finish Date	Committed Start Date	Committed Finish Date	Actual Start Date	Actual Finish Date	On Time Finish	Comments	Validation Message
<input type="checkbox"/> Yes	Plan	Plan			3/2/23	11/24/22		6/9/22	11/16/22	(8)	Committed Finish Date is Prior To Committed Start Date.
<input type="checkbox"/> Yes	Go Live-1 (Mixed Mode)	Go Live	4/8/23	3/31/23	3/31/23	3/31/23	3/31/23	3/31/23	0		Target Finish Date is Prior To Target Start Date.
<input type="checkbox"/> Yes	Study	Study			9/1/23	6/2/22	9/1/23	6/2/22	0		Actual Finish Date is Prior To Actual Start Date. Committed Finish Date is Prior To Committed Start Date.

On-Time Delivery Calculation is done as the Actual dates are updated. This color-coded metric will display in the On-Time Finish column, with Green for On Time, and Red for late completion.

For example:

Name	Stage	Target Start Date	Target Finish Date	Committed Start Date	Committed Finish Date	Actual Start Date	Actual Finish Date	On Time Finish
<input type="checkbox"/> Study	Study	May 16, 2023	May 31, 2023	May 16, 2023	May 31, 2023	May 16, 2023	Jun 2, 2023	(2)
<input type="checkbox"/> Research	Research	Jun 1, 2023	Jun 15, 2023	Jun 1, 2023	Jun 15, 2023	Jun 3, 2023	Jun 10, 2023	(5)
<input type="checkbox"/> Plan	Plan	Jun 16, 2023	Jun 30, 2023	Jun 16, 2023	Jul 15, 2023	Jun 11, 2023	Jul 22, 2023	(7)
<input type="checkbox"/> Implement	Implement	Jul 1, 2023	Aug 31, 2023	Jul 15, 2023	Aug 15, 2023	Jul 23, 2023	Aug 14, 2023	(11)
<input type="checkbox"/> Go Live	Go Live	Sep 1, 2023	Sep 1, 2023	Aug 16, 2023	Aug 16, 2023	Aug 15, 2023	Aug 15, 2023	(11)
<input type="checkbox"/> Close	Close	Sep 2, 2023	Sep 16, 2023	Aug 17, 2023	Aug 31, 2023	Aug 16, 2023	Aug 31, 2023	(0)

- Study – Finished June 2, 2023, 2 days behind the Committed Finish Date of May 31, 2023.
- Research – Completed on June 10, 2023, 5 days ahead of schedule; Committed Finish Date June 15, 2023.
- Plan – The team conducted a thorough planning stage, although it took them 7 days past the July 15, 2023 Committed Finish Date and actually finished on July 22, 2023.
- Implement – Due to detailed planning the team finished on August 14, 2023, one day ahead of the Committed Finish Date of August 15, 2023.
- Go Live – Actual go live was one day ahead of schedule and finished on August 15, 2023.
- Close – The project closed on August 31, 2023 right on schedule with the Committed Finish date.

Procedure

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NOTE: The following steps are specific to the standard DT methodology; however, the same basic process is to be applied to the DT-TR methodology.

- Once your project is approved to start, in the Study Stage record, enter the following dates
 - Target Start
 - Target Finish
 - Committed Start
 - Actual Start
- Two weeks later, once your Study Stage Finish Date has been identified, enter the
 - Study Committed Finish Date
 - Research Committed Start Date
- Before exiting Study, enter the
 - Target Start Date for all Stages and at least one Go-Live
 - Target Finish Date for all Stages and at least one Go-Live
 - Research Committed Finish Date

NOTE: Target Dates can be revisited and updated as you continue to refine and work through the project.
- Upon exiting Study and entering Research, enter the
 - Study Actual Finish Date
 - Research Actual Start Date
- Two weeks later, once your Research Stage Finish Date has been identified, enter the
 - Research Committed Finish Date
 - Plan Committed Start Date
- Before exiting Research, enter the
 - Plan Committed Finish Date

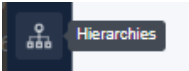
NOTE: You can review/revise future Stages' Target Dates at this time as well.
- Upon exiting Research and entering Plan, enter the

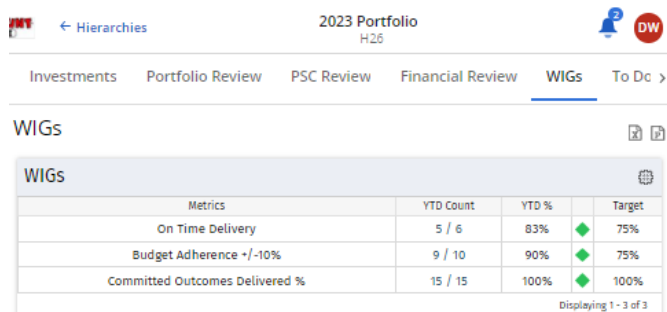
a) Research Actual Finish Date	b) Plan Actual Start Date								
8) Before exiting Plan, enter the a) Committed Start Date for all remaining Stages, including each major Go-Live b) Committed Finish Date for all remaining Stages, including each major Go-Live REMINDERS: <ul style="list-style-type: none"> Go-Live(s) should occur within the Implement Stage. Implement should include time for Hypercare; a minimum of 2 weeks after all Go-Lives are complete. 									
9) Upon exiting Plan and entering Implement, enter the a) Plan Actual Finish Date b) Implement Actual Start Date									
10) As each Go-Live occurs, enter the a) Go-Live Actual Start Date b) Go-Live Actual Finish Date									
11) Upon exiting Implement and entering Close, enter the a) Implement Actual Finish Date b) Close Actual Start Date									
12) Upon Completing the Close Stage, enter the a) Close Actual Finish Date									
<div style="border: 2px solid red; padding: 5px; color: red; font-weight: bold;"> NOTE: Always validate the OTD Dates correlate to the project schedule and adjust as necessary </div>									
<p>To add a manual Stage or Milestone, click the + at the top, assign a name, and select the Stage it applies to from the drop-down menu in the next column (Stage column). This is will most often be done for:</p> <ul style="list-style-type: none"> Multiple Go-Lives (aka phased roll outs) Milestone Tracking – You can add Milestones to the OTD page that you want to monitor and target dates for completion (e.g., tracking date for when you want to Complete Design) <p>Examples:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 60%;">Name *</th> <th style="width: 40%;">Stage</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> PSC Presentation</td> <td>Milestone</td> </tr> <tr> <td><input type="checkbox"/> Design Complete</td> <td>Plan</td> </tr> <tr> <td><input type="checkbox"/> Go Live Beta Relea...</td> <td>Go Live</td> </tr> </tbody> </table>		Name *	Stage	<input type="checkbox"/> PSC Presentation	Milestone	<input type="checkbox"/> Design Complete	Plan	<input type="checkbox"/> Go Live Beta Relea...	Go Live
Name *	Stage								
<input type="checkbox"/> PSC Presentation	Milestone								
<input type="checkbox"/> Design Complete	Plan								
<input type="checkbox"/> Go Live Beta Relea...	Go Live								

Reporting

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OTD Metrics are available within Hierarchies on the WIGs page (NOTE: access to Hierarchies is currently limited).

1. 
2. Select the desired Hierarchy (Portfolio)
3. Go to the WIGs tab



Metrics	YTD Count	YTD %		Target
On Time Delivery	5 / 6	83%	◆	75%
Budget Adherence +/-10%	9 / 10	90%	◆	75%
Committed Outcomes Delivered %	15 / 15	100%	◆	100%

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Appendix A: Terms & Definitions

Actual Finish Date	Actual calendar day when stage finishes
Actual Start Date	Actual calendar day when stage starts
Baseline	The approved timeline for a particular item or project phase. In the OTD context, baseline is focused on the project schedule, as determined by the PM.
Comments	Freeform field allowing for additional details and comments to be included on the OTD record
Committed Date	A planned start or finish date that has been baselined by the PM.
Committed Finish Date	The planned finish date for a stage of a project plan which has been baselined. Committed finish dates are typically established for the next stage near the very end of the current stage. This date is used in the On-Time Delivery metric along with the Actual Finish Date.
Committed Start Date	The planned start date for a stage of a project plan which has been baselined. Committed start dates are typically established for the next stage near the very end of the current stage.
Created By	The resource that created the OTD Record
Created Date	The date the OTD Record was created
ID	*Required field – System generated identification number for the OTD Record
Last Updated By	The resource that last updated the OTD Record
Last Updated Date	The date the OTD Record was last updated
Name	*Required field – Name of the OTD Record (Study, Research, Go-live, etc)
On Time Delivery	Metric showing how close a project performed on time to its planned stage gates, Go-Live Date(s), and approved completion date (both to original project commitment and to the latest re-baselined commitment)
On Time Finish	System generated, traffic lighting indicator, ahead of schedule (green) or behind schedule (red), with the number of days calculated comparing the Committed Finish Date and Actual Finish Date
Re-baseline	A new committed finish date permitted by DT IT re-baselining rules.
Stage	PMO Methodology identifies the following 5 Stages: Study, Research, Plan, Implement, Close. Implement consists of Build and Deploy. DT IT has added Go Live stage milestones within the Implement Stage
Starred	Selecting OTD Record as a favorite
Target Start Date	The planned start date for a stage of a project plan that is not yet baselined. Target start dates are typically established before entering the next or subsequent stages
Target Finish Date	The planned finish date for a stage of a project plan that is not yet baselined. Target finish dates are typically established before entering the next stage or subsequent stages
Validation Error	Indicates if the OTD Record has an error with a Yes (red traffic light) symbol
Validation Message	System generated message describing the Validation Error. For example; 'Actual Finish Date is Prior To Actual Start Date. Target Finish Date is Prior to Target Start Date. Committed Finish Date is Prior to Committed Start Date'