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by a-dato

Get started with Stage Planning

Stage Plan Applications Overview

Levels of Altitude: Stage Planning

November 2025

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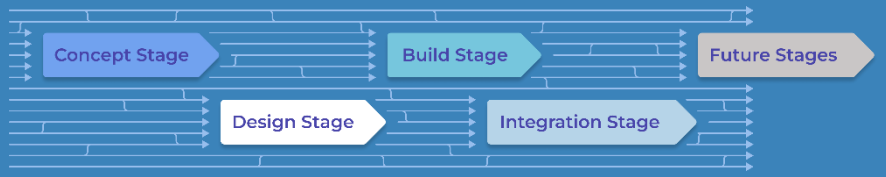
Get started with Stage Planning

- Introduction
  - Levels of Altitude in Planning
  - Stage Plan Applications:
    - Scenario Planning
    - Financial Management
    - High Level Timelines
    - …
- Setting up a Space for Stage Planning
- Working with Stages:
  - Where to add Stages?
  - How to add Stages?
  - How to select Stage Types?
  - Adding Stage Milestones
  - How to add Skills / Resources?
- Combining Stage and Detail plans
  - Why integration of Stage with Detail Plans?
  - Methods for integrating Stage and Detail Plans
    - Via Task Properties: link Task to a Stage
    - Via Stage – Task Dependencies
  - Recommendations
- Portfolio Timeline Visualization
- Summary:
  - LYNX Stage Planning Examples

Levels of Altitude

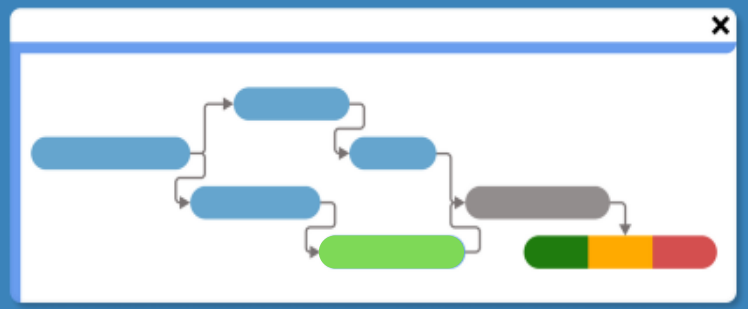
Timeline World

Stage Plan



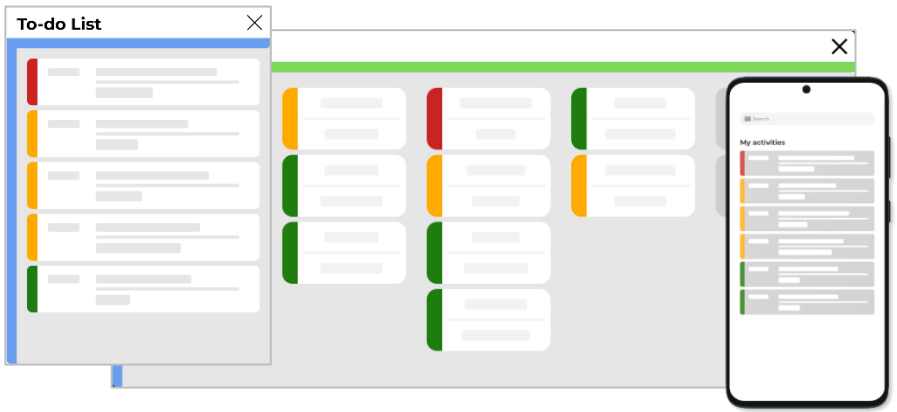
Level 1
High Level Timeline and
Resource Estimates and
Financials

Detail Plan
Tasks & Workpackages



Level 2:
Planning for Execution
Critical Path / Critical Chain
Resource Planning

Tasks & Cards



Level 3:
Daily Operations
Task Management
Self-Managing Teams

Uniform Priorities

Agile World

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Discover the value of LYNX Stage Planning

Stage Plan Applications

High-Level Timelines

- Communicate Stage Plans with Stakeholders, Customers, Management.
- Communicate Actual Progress against Stage Plan
- Create Roadmaps

Progressive (detailed) Planning

- Avoid detailed planning too early, stay Agile
- Add (only) Detailed Planning for Execution to early stages
- Identify Future Stages without
- Essential Flow with Stage Only Plan

Resource Planning

- Identify high-level Resource Requirements for the end-to-end Timeline at “Stage Level”

Financial Management

- Manage Project Financials with Stages and Budgets
- Manage Cashflow
- Track planned versus actuals

Portfolio Scenario Planning

- Create Scenario Stage Plans
- Run Scenario Wizard at “Stage Level” and/or “Detailed Level”
- Auto-Sizing of Stages
- 2-Level Scenario Planning

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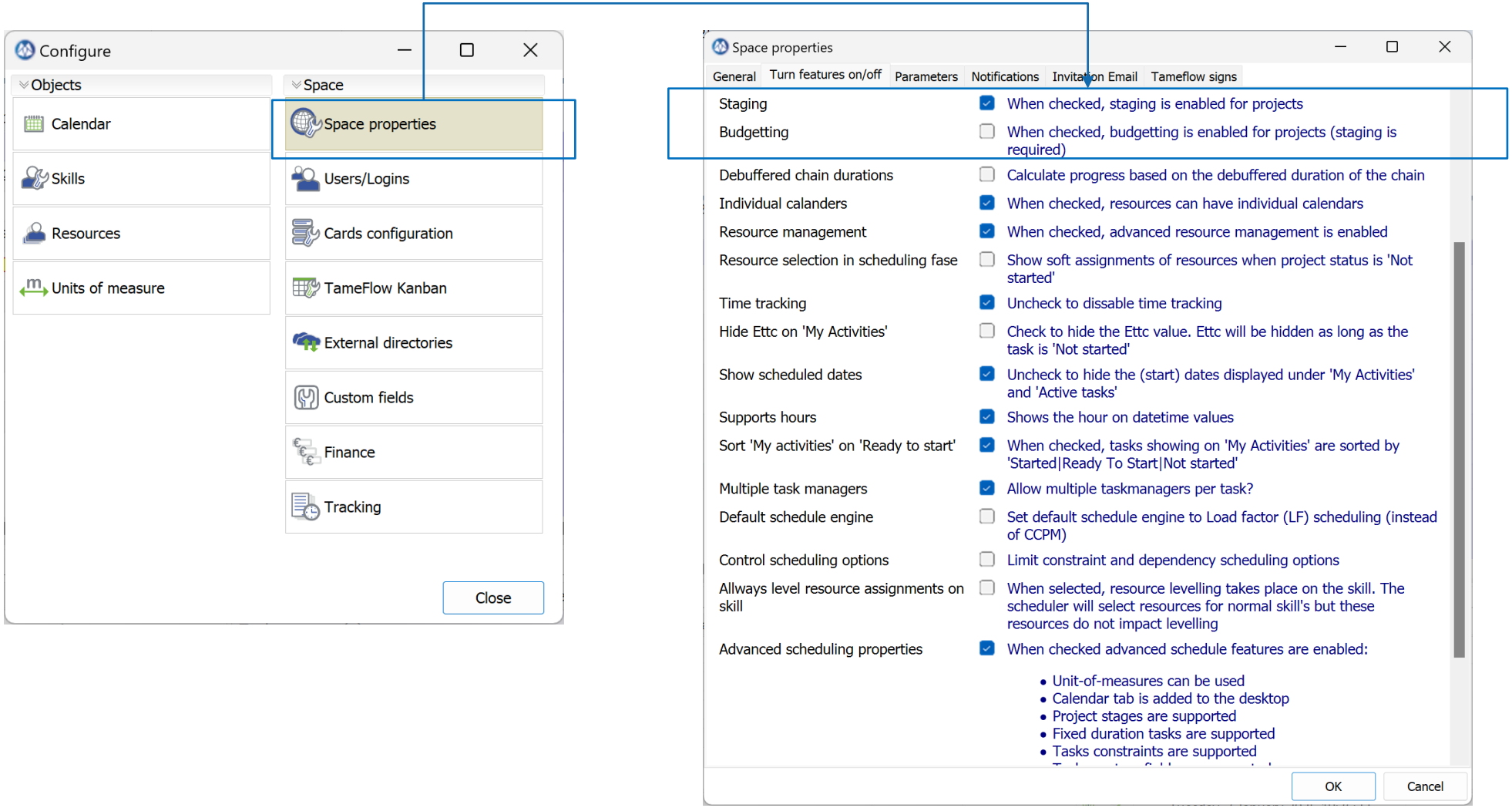
Space Settings

Switching on of Stage Features

- Stages
- Budgeting

Space Properties

Switching on Stage Planning / Budgeting



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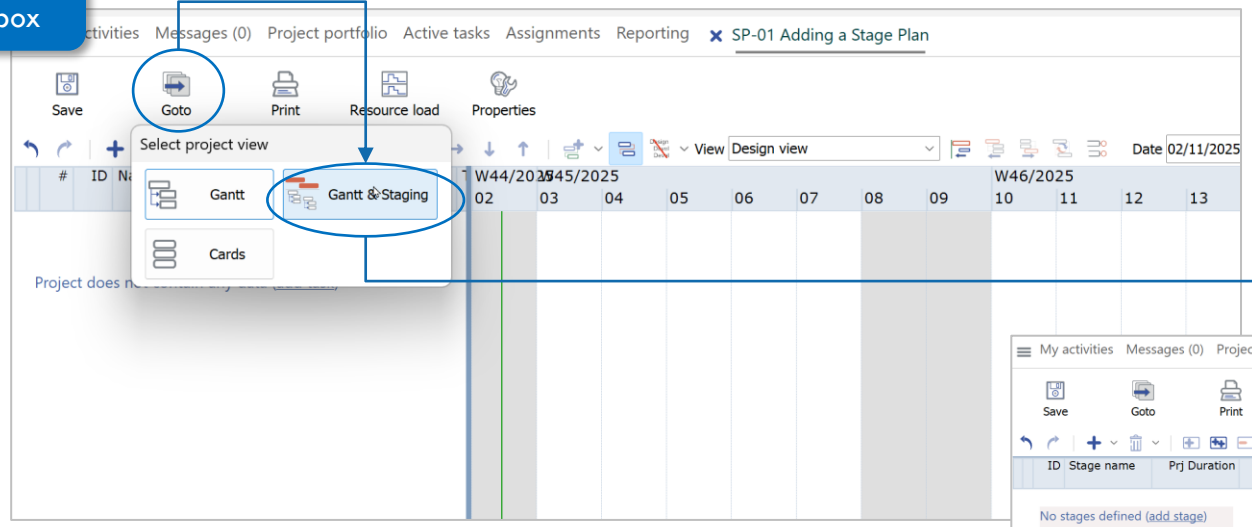
Creating a Stage Plan

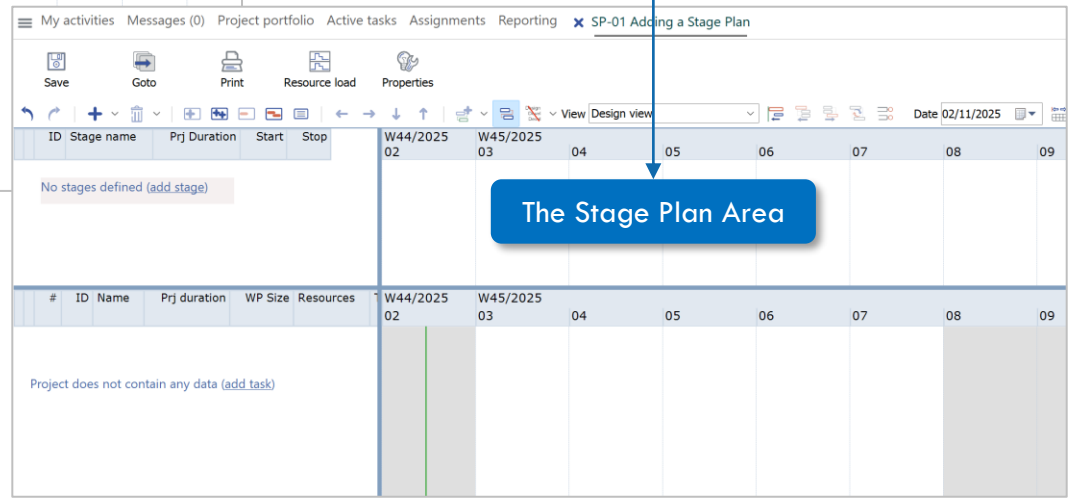
Adding Stages in LYNX

Adding stages (1)

Select the Goto box



Process for entering stages is the same as for standard tasks in a project plan.



The Stage Plan Area

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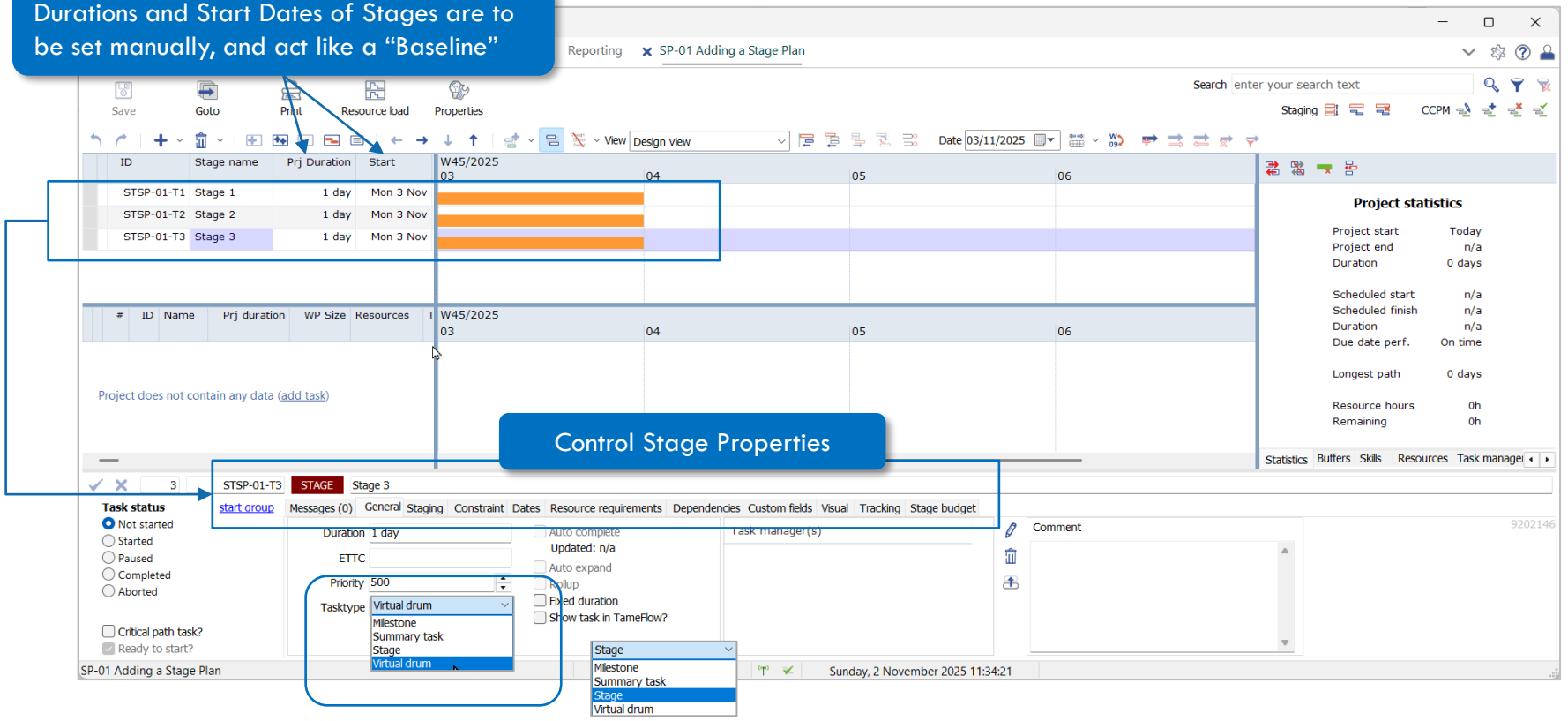
Adding stages and Stage Type(2)

Type: Virtual Drum (Scenario Planning) - Stage (Budget Management)

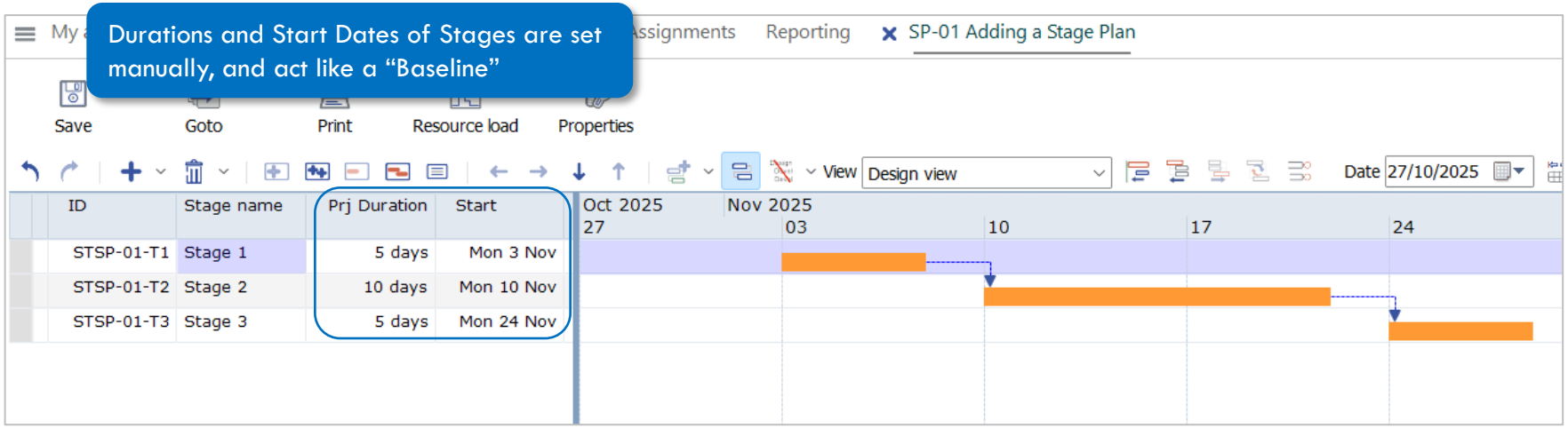
Durations and Start Dates of Stages are to be set manually, and act like a “Baseline”

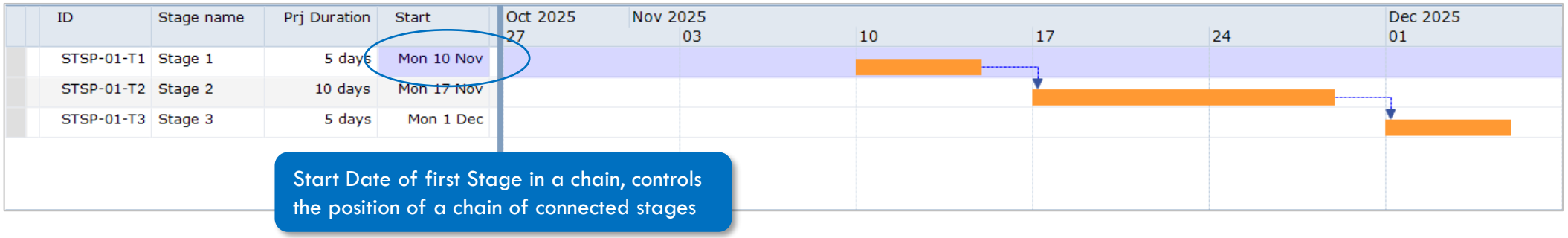


Select Type: **Virtual drum** for Scenario Planning

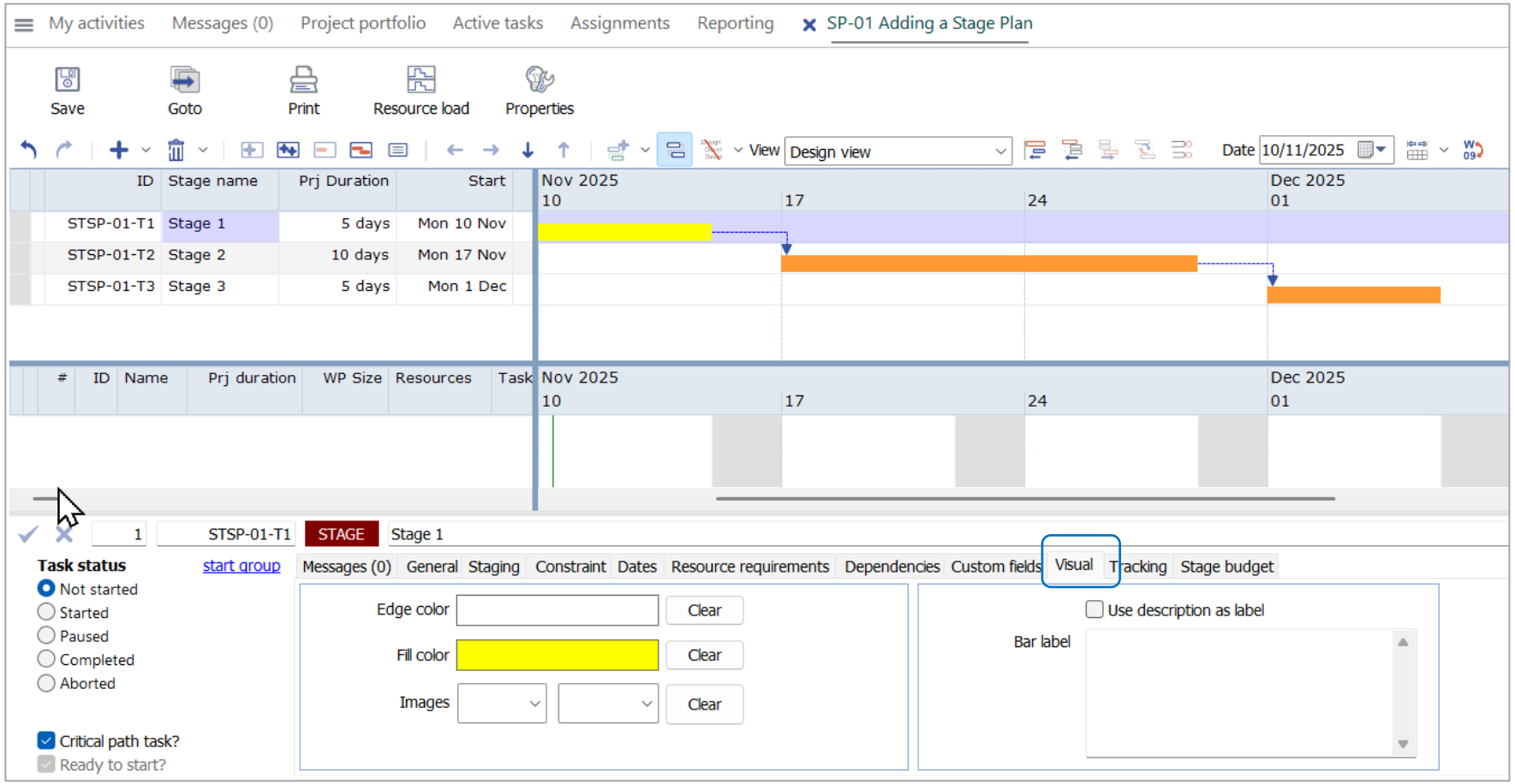
Select Type: **Stage** for Budget Management

Create a Stage Plan (1)



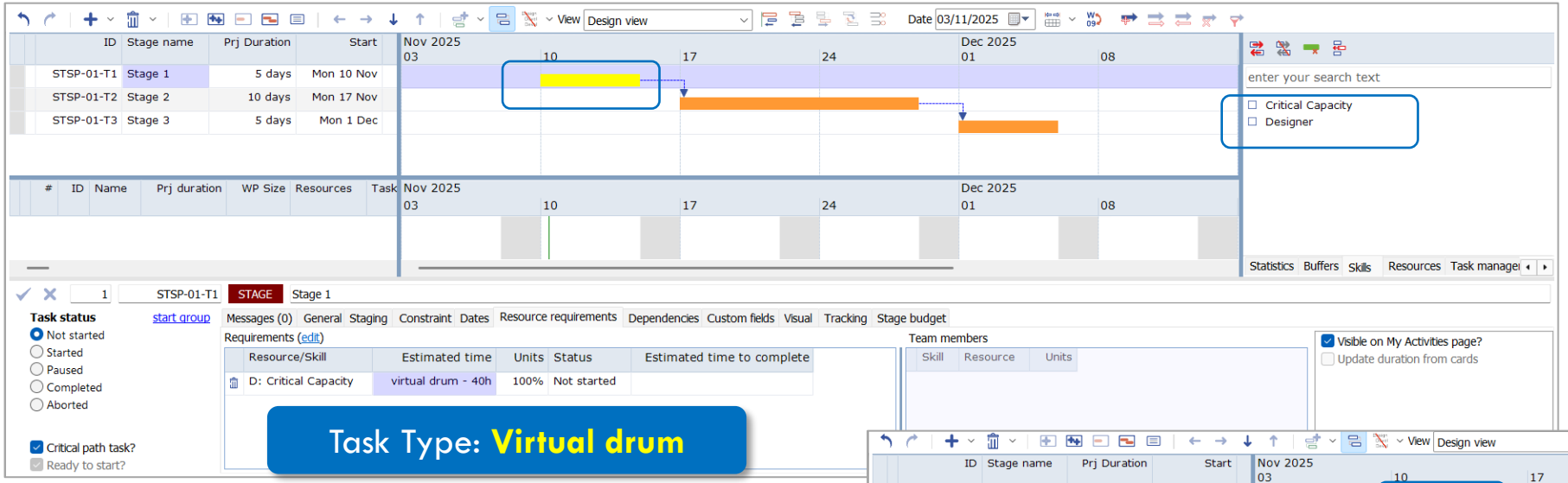


Add Visuals and Labels

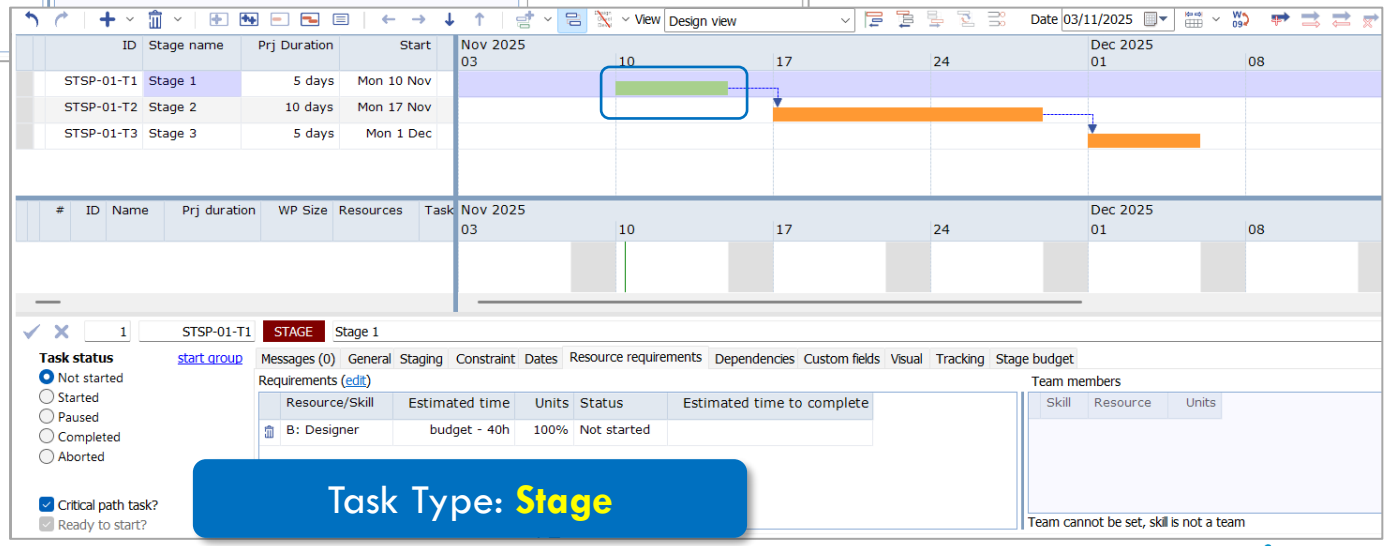


Create a Stage Plan (2)

Add Skill Requirement(s) / Stage Budget Requirement(s)



Task Type: **Virtual drum**



Task Type: **Stage**

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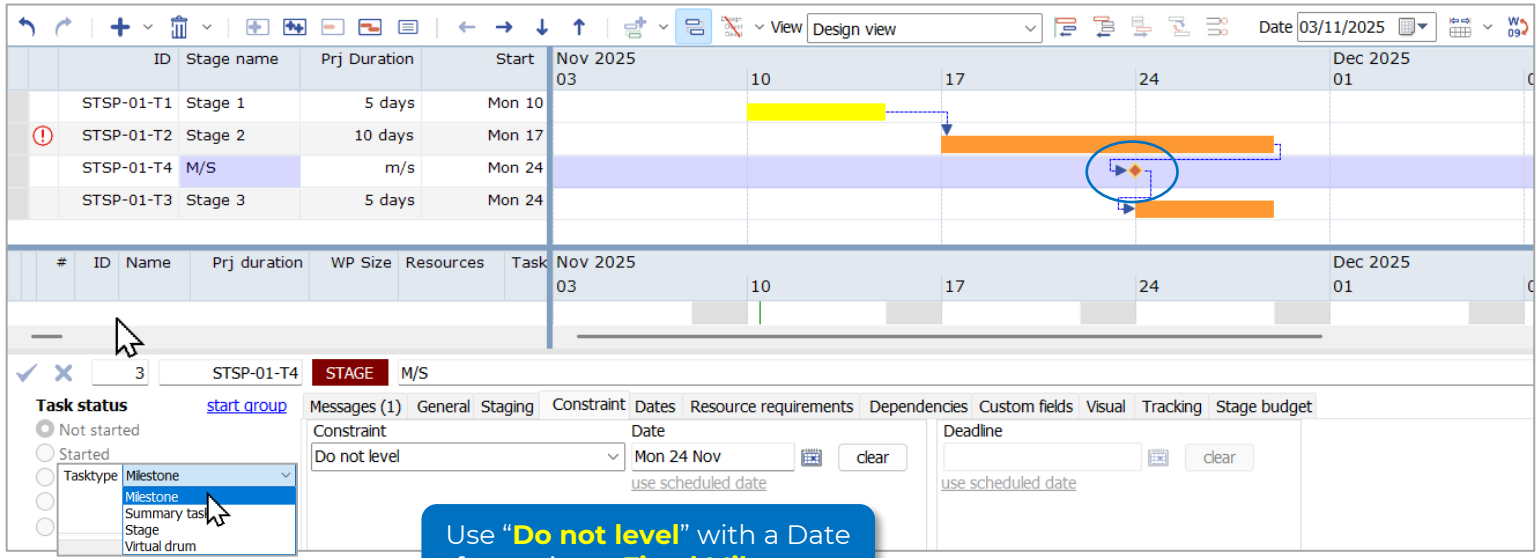
Create a Stage Plan (3)

Add Milestones and Milestone Behavior (fixed or floating)



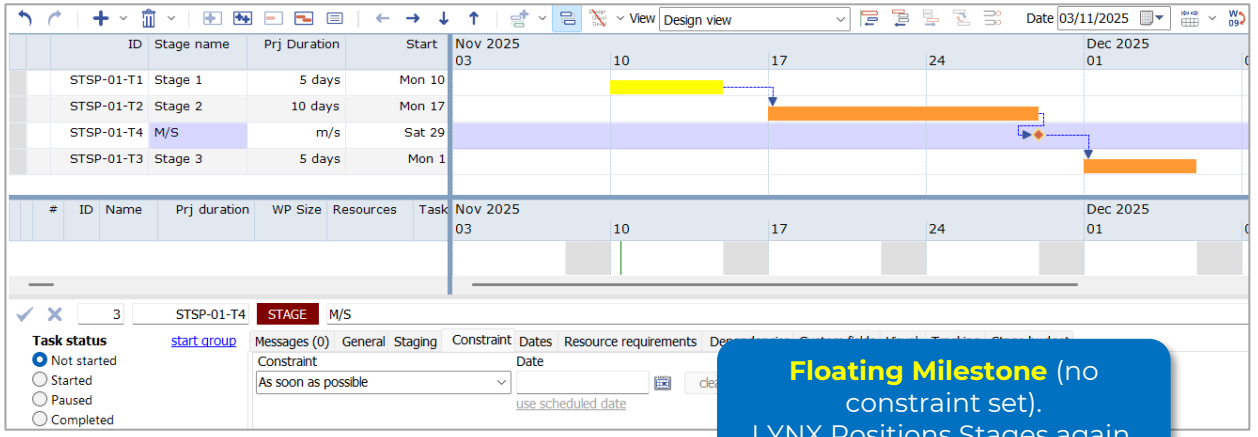
Use "**Do not level**" with a Date for setting a **Fixed Milestone**

When use Fixed Milestones?

When doing **Scenario Planning, Fixed Milestones** are used to automatically determine Stage duration between two Fixed Milestones Dates.

When use Floating Milestones?

Typically used for Visualization Purposes



Floating Milestone (no constraint set).
LYNX Positions Stages again.

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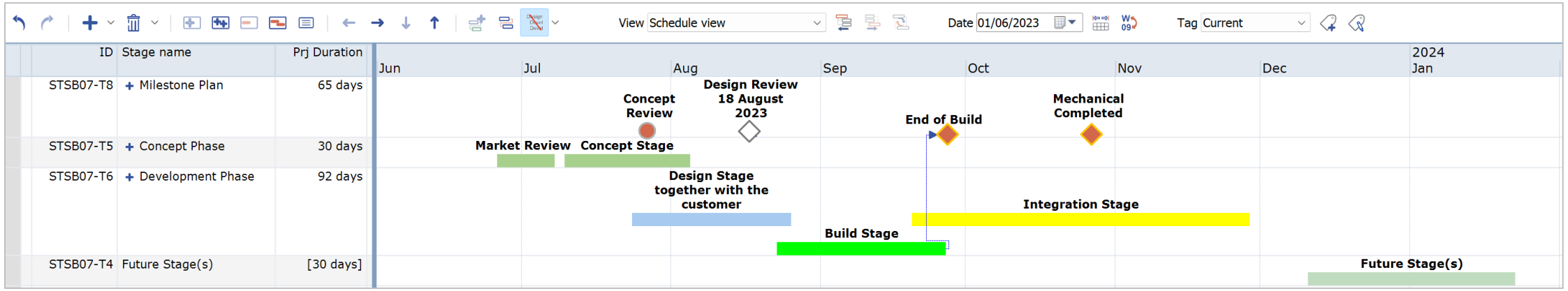
Example Stage Plan



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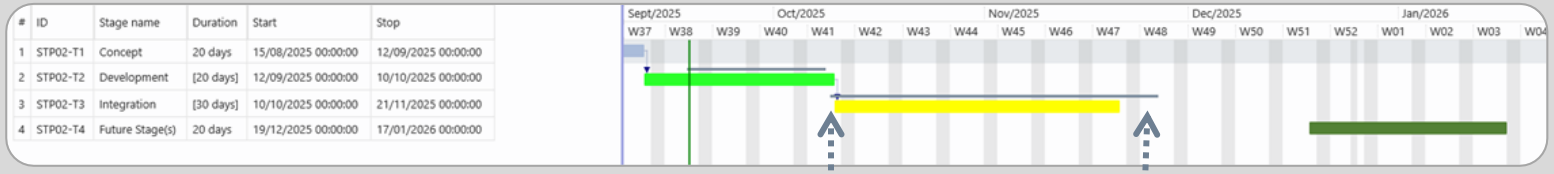
Combining Stage and Detail Plans

- Why integration of Stage with Detail Plans?
- Methods for integrating Stage and Detail Plans

Example: Integration of Stage (L1) and Detail Plan (L2) - Levels of Altitude

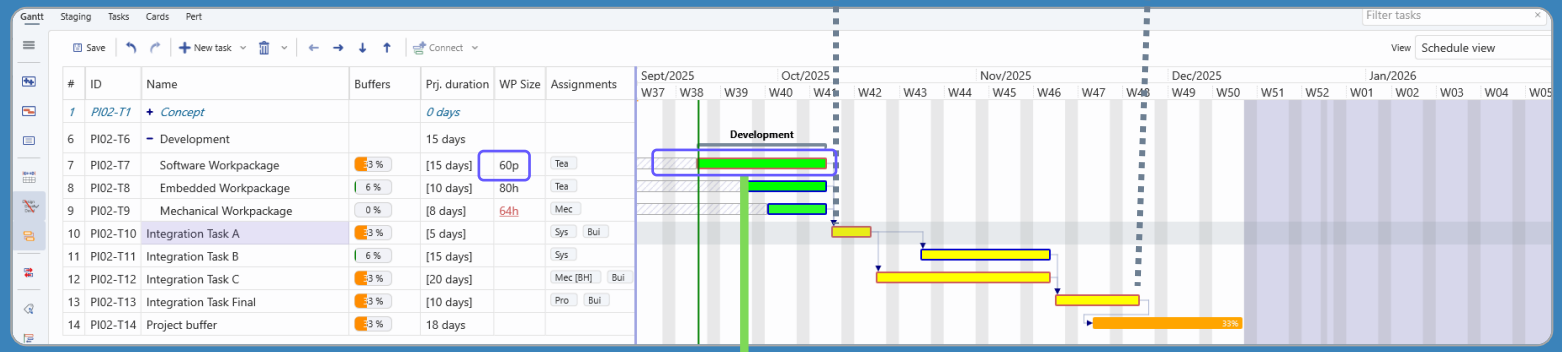
Stages



#	ID	Stage name	Duration	Start	Stop
1	STP02-T1	Concept	20 days	15/08/2025 00:00:00	12/09/2025 00:00:00
2	STP02-T2	Development	[20 days]	12/09/2025 00:00:00	10/10/2025 00:00:00
3	STP02-T3	Integration	[30 days]	10/10/2025 00:00:00	21/11/2025 00:00:00
4	STP02-T4	Future Stage(s)	20 days	19/12/2025 00:00:00	17/01/2026 00:00:00

Level 1 *(Optional)*
High Level Timeline
and Resource
Estimates

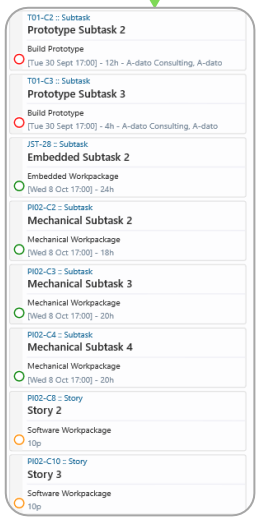
Tasks Workpackages



#	ID	Name	Buffers	Prj. duration	WP Size	Assignments
1	PI02-T1	+ Concept		0 days		
6	PI02-T6	− Development		15 days		
7	PI02-T7	Software Workpackage	3 %	[15 days]	60p	Tea
8	PI02-T8	Embedded Workpackage	6 %	[10 days]	80h	Tea
9	PI02-T9	Mechanical Workpackage	0 %	[8 days]	64h	Mec
10	PI02-T10	Integration Task A	3 %	[5 days]		Sys Bui
11	PI02-T11	Integration Task B	6 %	[15 days]		Sys
12	PI02-T12	Integration Task C	3 %	[20 days]		Mec [BH] Bui
13	PI02-T13	Integration Task Final	3 %	[10 days]		Pro Bui
14	PI02-T14	Project buffer	3 %	18 days		

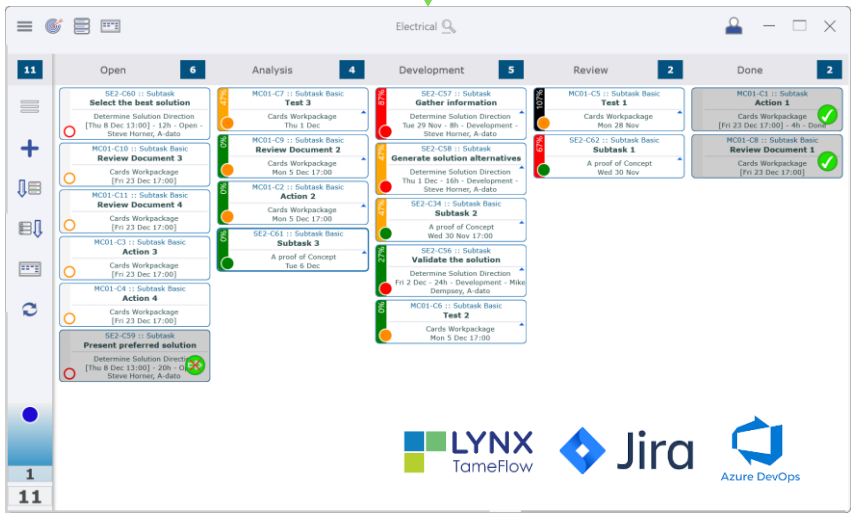
Level 2:
Planning for Execution
Critical Path / Critical Chain
Resource Planning

Cards



The TameFlow Approach

Through LYNX TameFlow, Agile and Kanban workflows are integrated, bringing Agile CCPM to life.



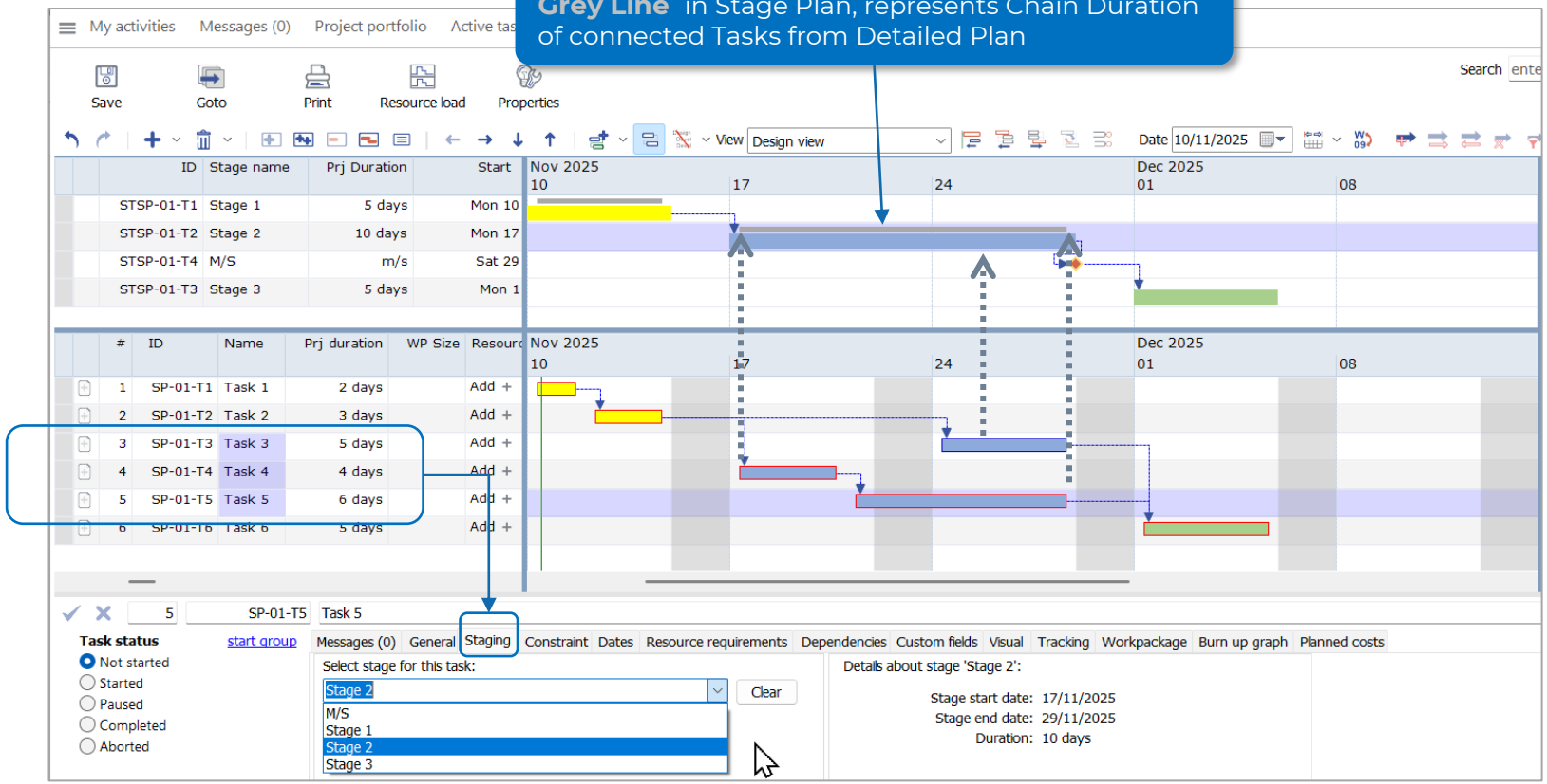
Level 3:
Daily Operations
Self Managing Teams

How to integrate Stage and Detail Plans?

Method 1: Connect Task(s) to a stage via Staging Tab Dropdown

Grey Line in Stage Plan, represents Chain Duration of connected Tasks from Detailed Plan

Select Task(s) and choose a Stage to connect Tasks to the selected Stage.



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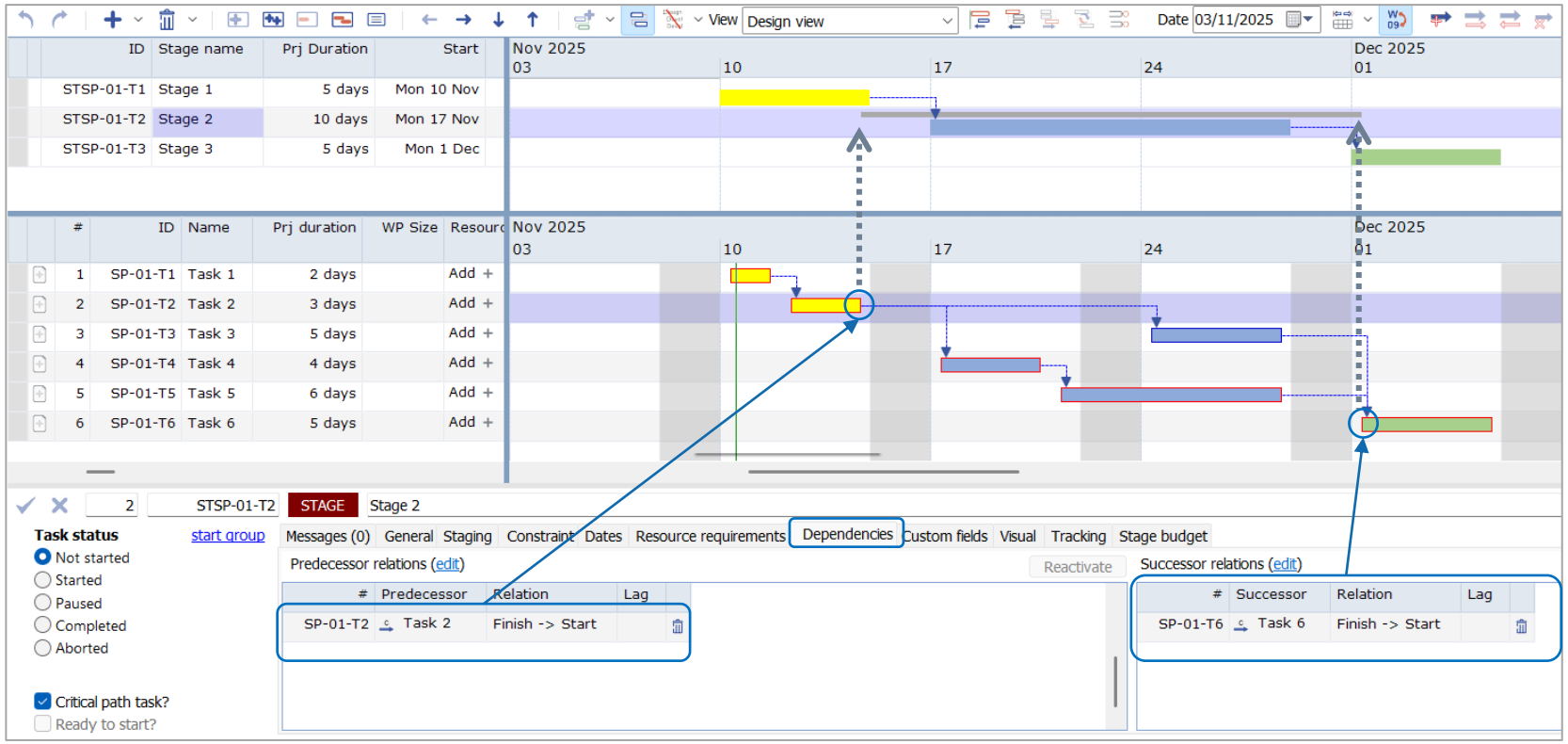
How to integrate Stage and Detail Plans?

Method 2: Connect “Anchor points” in Detail Plan with Stage Plan

Select **Stage Predecessor** and **Successor** from Detail Plan as “**Anchor points**”



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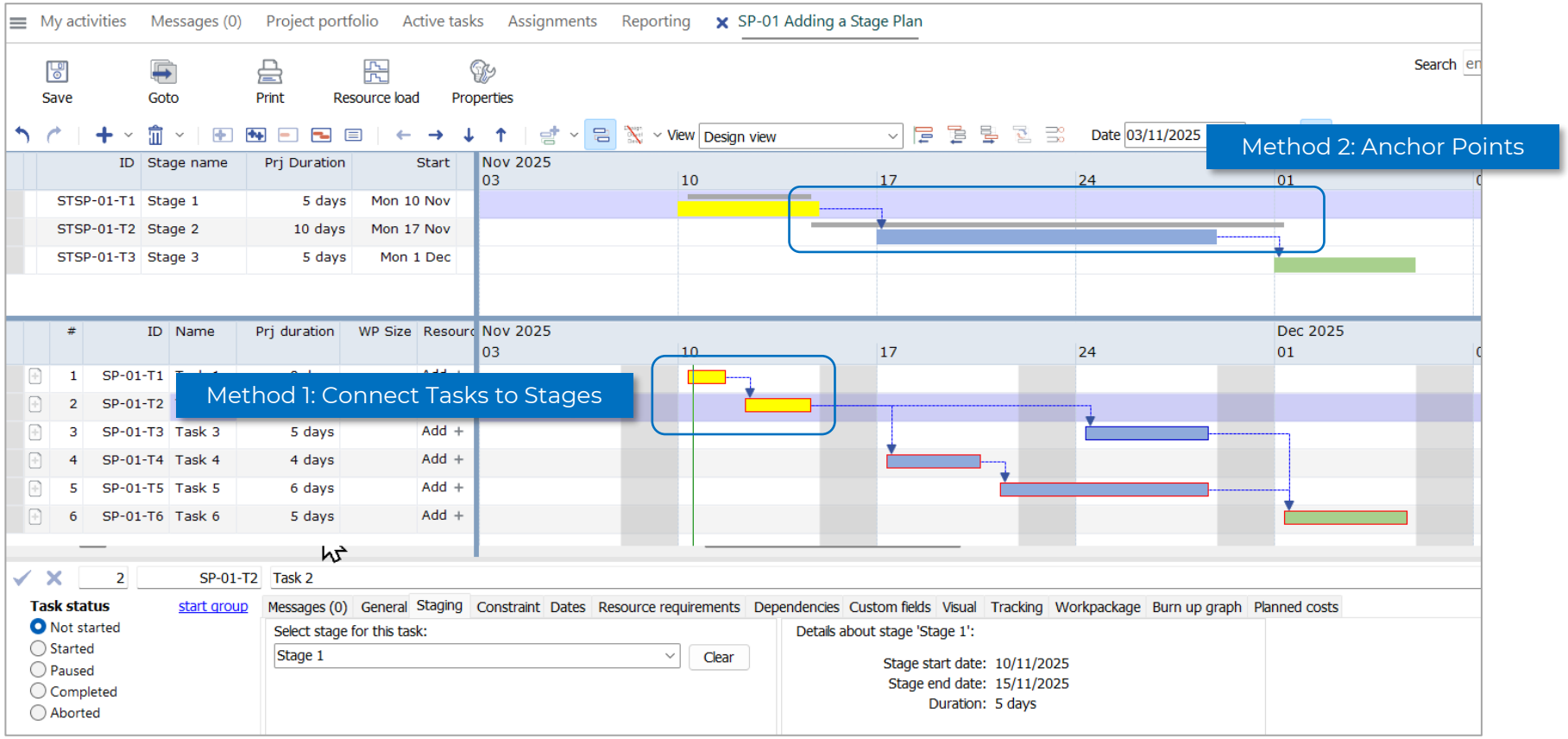
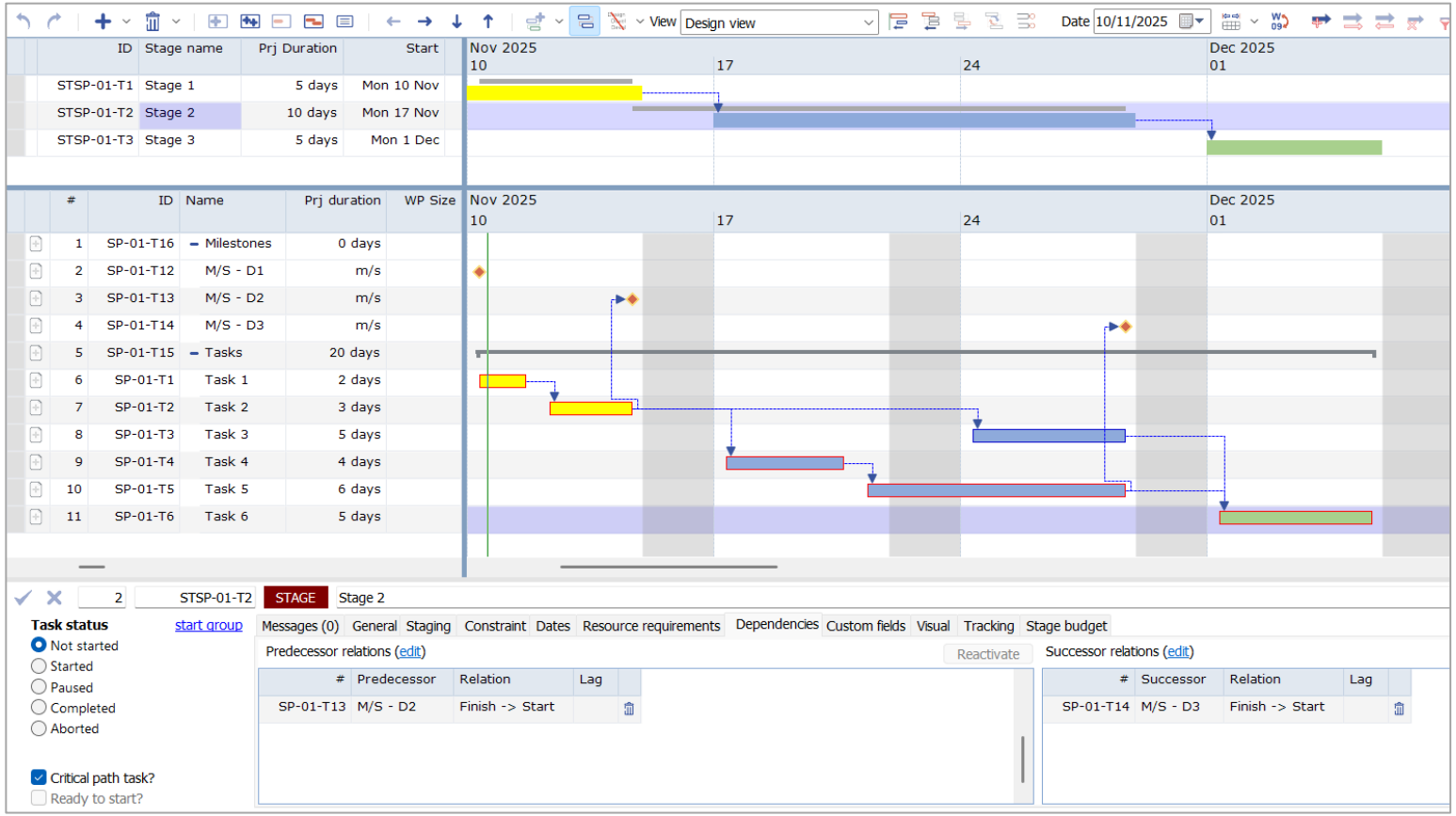
How to integrate Stage and Detail Plans?

It is possible to mix methods...



Example:

Anchor points via Milestones in Detail Plan



Integration Stage and Detail Plans
Considerations & Recommendations

Why integrate Stage with Detail Plans?

- Project Management:
  - Compare Base Line Stage Plan with actual Progress
  - Visualization and Management Overview
- Scenario Planning Perspective:
  - Enable 2-Tier Scenario Planning, combining Stage
  - Automatic Sizing of Remaining Stage Duration considering Task Progress and Completion
- Budget Management Perspective:
  - Distribute budget across Tasks
  - Compare Stage Budget with Planned Costs

Which integration Methods to use?

- Budget Management Perspective:
  - Always use **Method 1** to connect all Tasks to a Stage
- Scenario Planning Perspective:
  - Either Method 1 or Method 2 can be used (and Mixed)
  - **Method 2 (Anchor points) Pro's:**
    - Only start and end anchor point must be set
    - Start and End points are relatively stable, even if Project plans are subject to many changes
  - **Method 1 (Drop-down) Pro's:**
    - Easy selection of multiple tasks to assign to a Stage in one step
    - Filtering possible of all Tasks linked to a Stage

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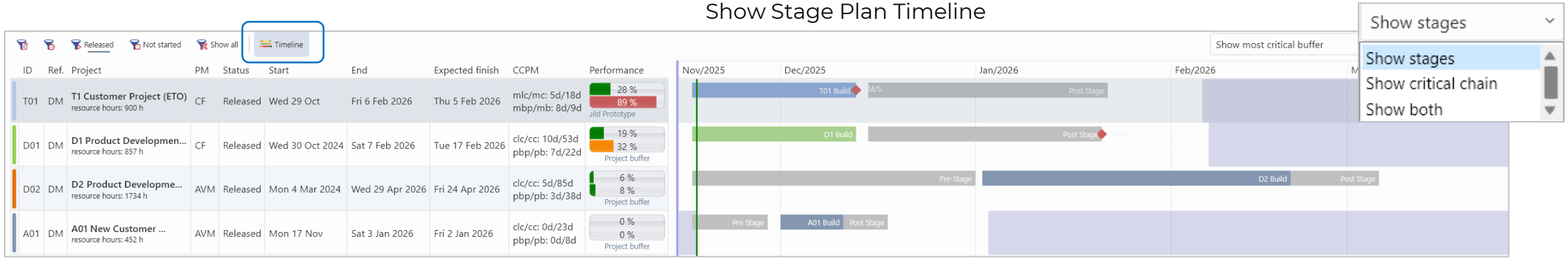
Portfolio Timeline Visualization

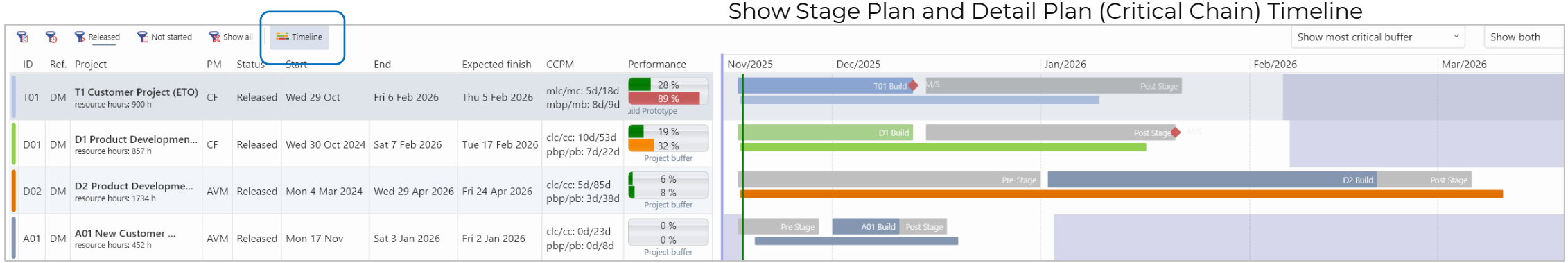
Portfolio Timeline Visualization

Stage Plan Timeline Views

Show Stages:
Show Stage Plan Timeline



Show Both:
Show Stage Plan and Detail Plan (Critical Chain) Timeline



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Stage Planning Applications

LYNX Examples:

- Two Level Scenario Planning
- Financial Management
- High Level Timelines / Communication

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Discover the value of LYNX Stage Planning

Stage Plan Applications

High-Level Timelines

- Communicate Stage Plans with Stakeholders, Customers, Management.
- Communicate Actual Progress against Stage Plan
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Portfolio Scenario Planning

- Create Scenario Stage Plans
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- Auto-Sizing of Stages
- 2-Level Scenario Planning

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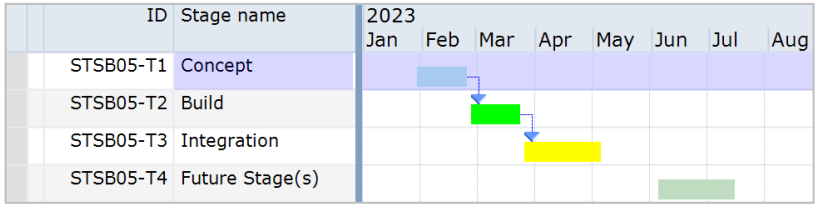
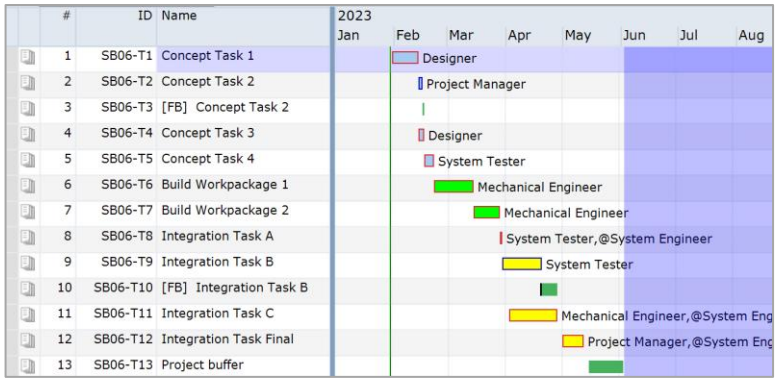
Enable Multi-Level Scenario Planning with Stages

Choose your Altitude: Stage, Detail, Integrated….

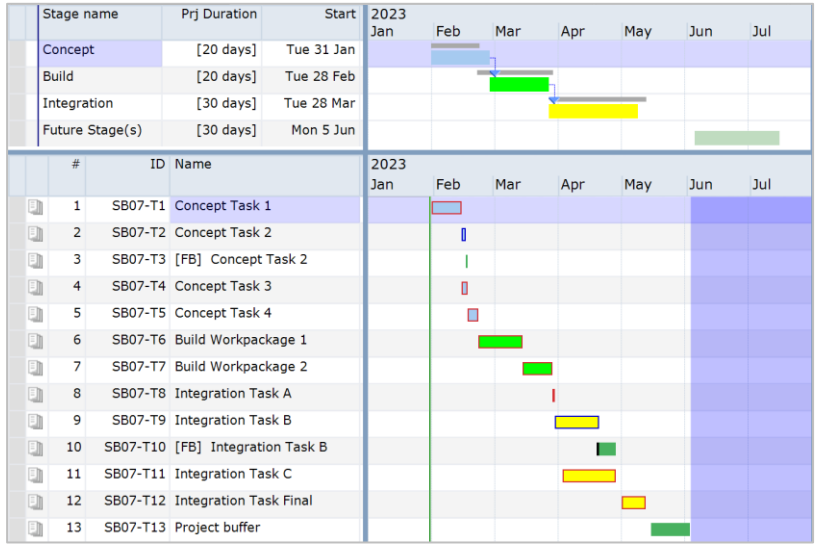
By Stage (Essential Flow)



By Detailed Plan (Default)



Integrated: By Stage and Detailed Plan



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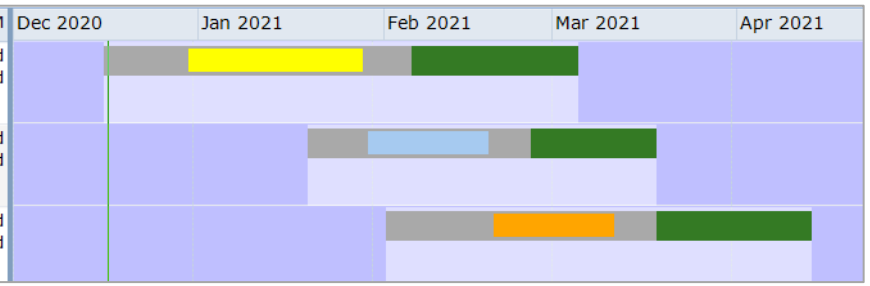
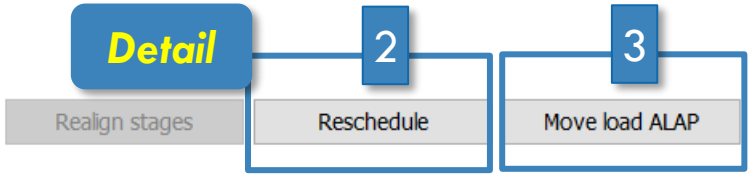
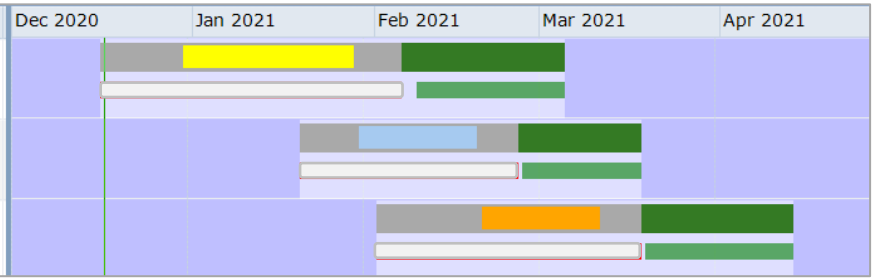
Scenario Wizard with Multi-Level Optimization
Choose your Altitude: Stage, Detail, Integrated….

	ID	Priority	Description	PM	Delta	Status	Start	End	CCPM
	PLU	3	**Pluto** resource hours: 448h remaining: 416h - 92%	AC		Released	Tue 1 Dec	Thu 25 Feb 2021	clc/cc: 4d/42d pbp/pb: 7d/21d
	MAR	3	**Mars** resource hours: 544h remaining: 480h - 88%	AC		Released	Fri 4 Dec	Wed 10 Feb 2021	clc/cc: 6d/34d pbp/pb: 4d/17d
	JUP	3	**Jupiter** resource hours: 384h remaining: 384h - 100...	AC		Released	Wed 16 Dec	Tue 23 Feb 2021	clc/cc: 0d/34d pbp/pb: 1d/17d





	ID	Priority	Description	PM	Delta	Status	Start	End
	PLU	3	**Pluto** resource hours: 448h remaining: 416h - 92%	AC	6 days	Released	~~Tue 1 Dec~~ Wed 16 Dec 9:00	~~Thu 25 Feb 2021~~ Fri 5 Mar 2021 17:00
	MAR	3	**Mars** resource hours: 544h remaining: 480h - 88%	AC	26 days	Released	~~Fri 4 Dec~~ Tue 19 Jan 2021 9:00	~~Wed 10 Feb 2021~~ Thu 18 Mar 2021 17:00
	JUP	3	**Jupiter** resource hours: 384h remaining: 384h - 100...	AC	35 days	Released	~~Wed 16 Dec~~ Mon 1 Feb 2021 9:00	~~Tue 23 Feb 2021~~ Tue 13 Apr 2021 17:00



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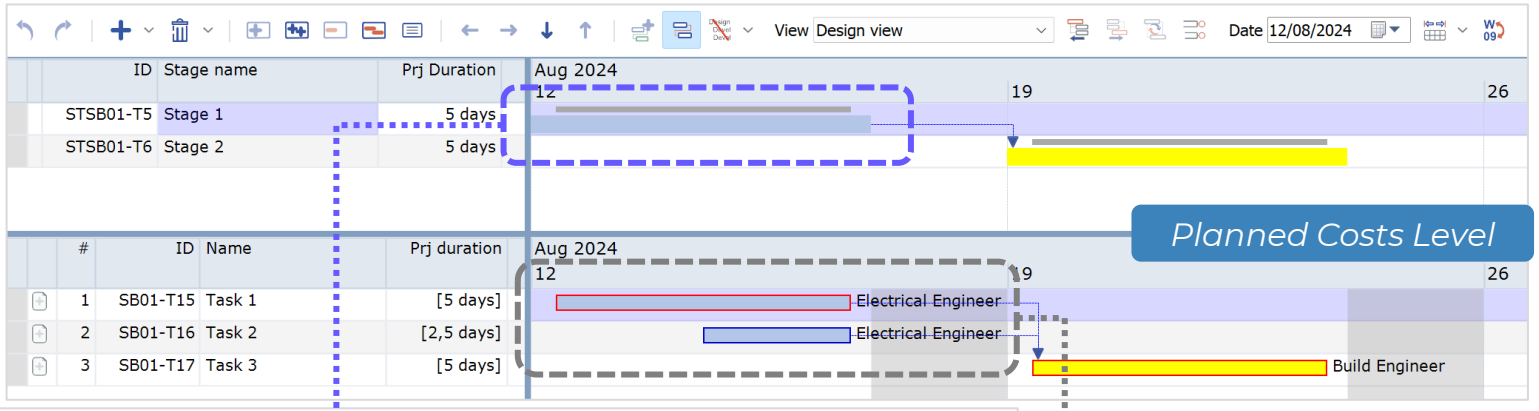
Financial Management

Budget Hierarchy: Stage Budget → Planned Costs

Stage Budget Level



Planned Costs Level

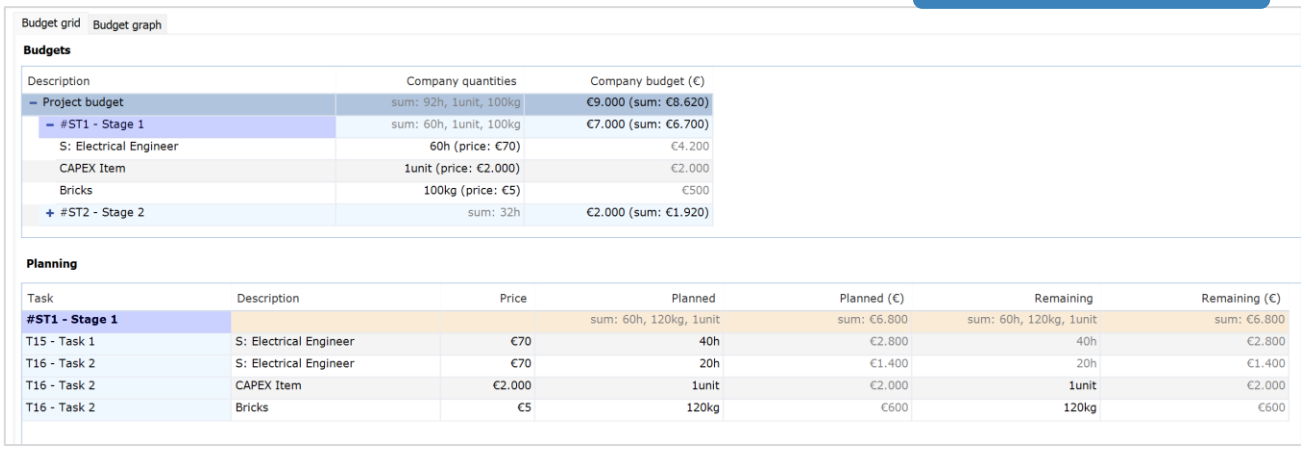
STAGE Stage 1

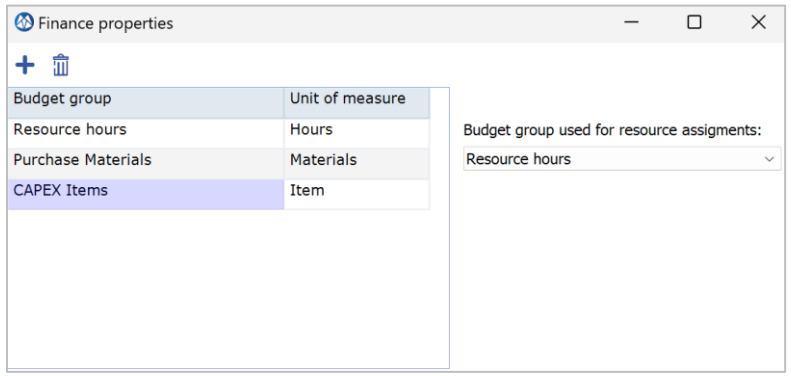
Messages (0) | General | Staging | Constraint | Dates | Resource requirements | Dependencies | Custom fields | Visual | Tracking | Stage budget

Stage budget €7.000

Description	Group	Unit of measure	Price	Stage budget	Stage budget (€)	Planned	Planned (€)	Remaining	Remaining (€)
S: Electrical Engineer	Resource hours	Hours (€/h)	€70	60h	€4.200	60h	€4.200	60h	€4.200
CAPEX Item	CAPEX Items	Item (€/unit)	€2.000	1unit	€2.000	1unit	€2.000	1unit	€2.000
Bricks	Purchase Materials	Materials (€/kg)	€5	100kg	€500	120kg	€600	120kg	€600

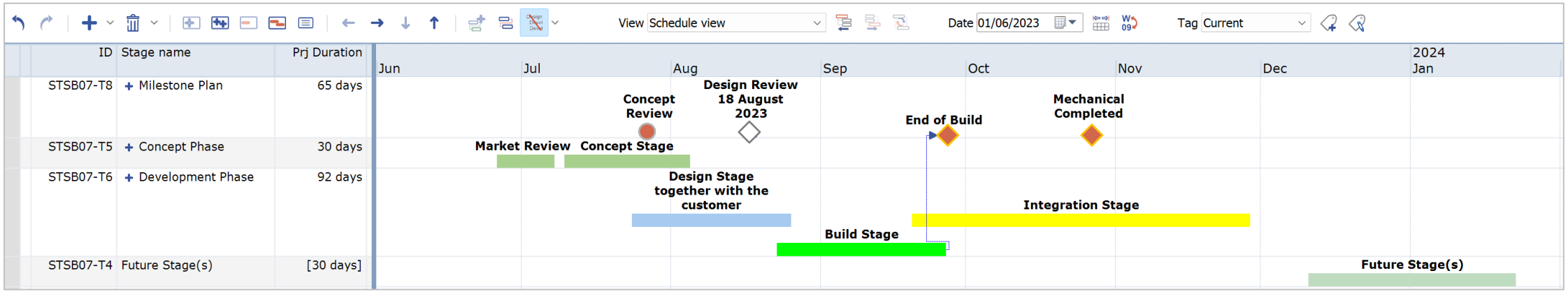
Budget Grid





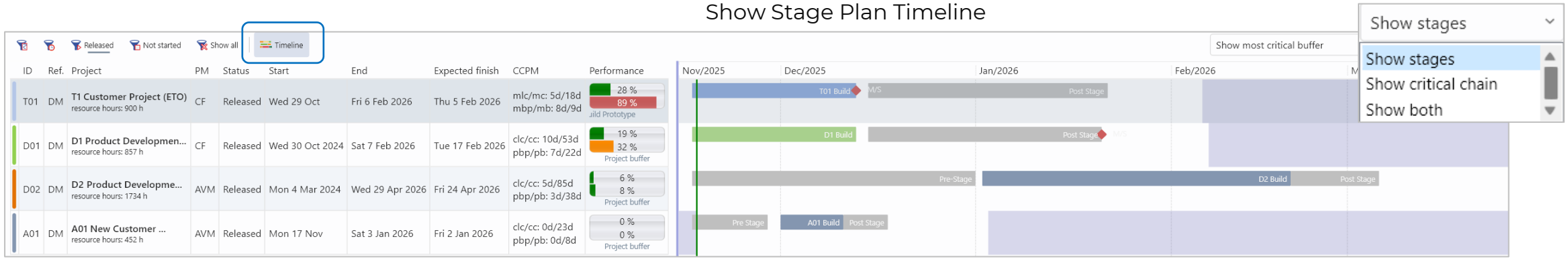
High Level Timelines

Communication with Stakeholders



Portfolio Timelines

Show Stages:
Show Stage Plan Timeline



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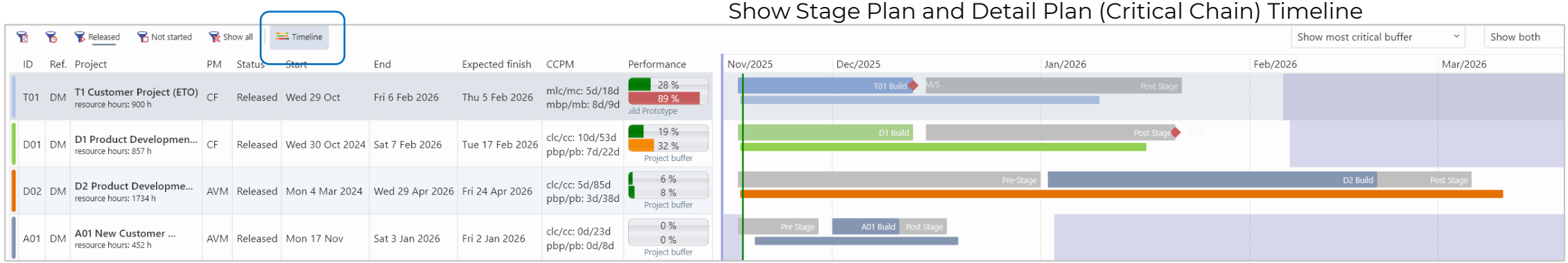
Show Stage Plan and Detail Plan (Critical Chain) Timeline



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Thank You

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Address

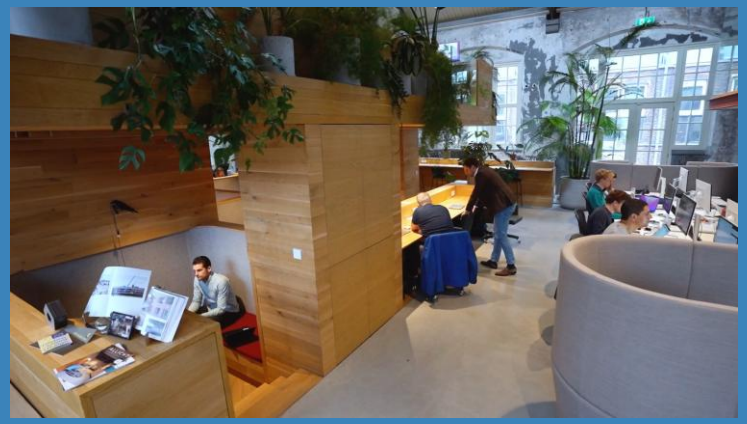
Professor Snijdersstraat 2, 2628 RA Delft

Telephone

+31 756409222

Website

www.a-dato.com



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