

Simplify Your Management

Visual Planning Boards

By Kathy Iberle



Key Points

- Planning boards prevent overloading yourself and your team.
- Calendar-driven planning boards prevent that last-minute rush.
- Flow-driven planning boards “pull” work to completion quickly.

What is a Visual Planning Board and How Can One Help?

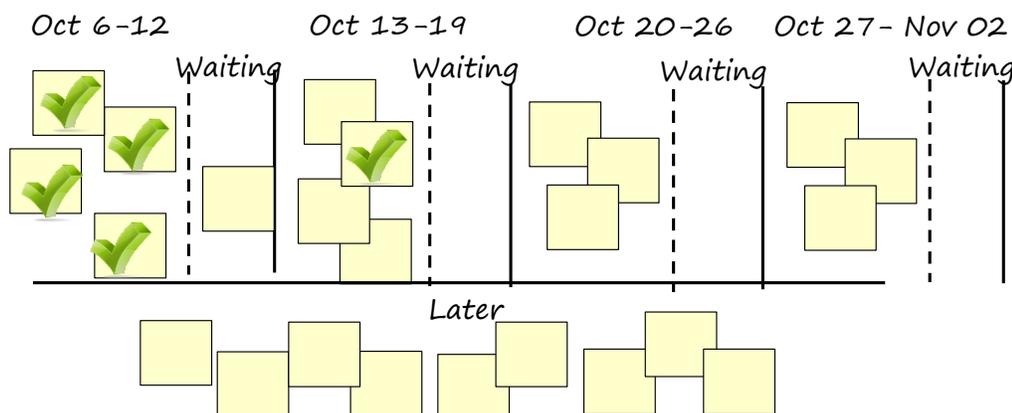
A Visual Planning Board is a simple, visual method to manage work across a team. You’ll have more time to spend on your real work because you’ll spend less time writing status reports, checking on progress, and figuring out what to work on next.

A Visual Planning Board represents all your work as sticky notes on a whiteboard or an empty wall. Each sticky note represents a half-day to a day’s worth of work. The sticky notes are spread out across time, which makes it easy to see when your team is overloaded or things are piling up.

Calendar-driven Planning Board

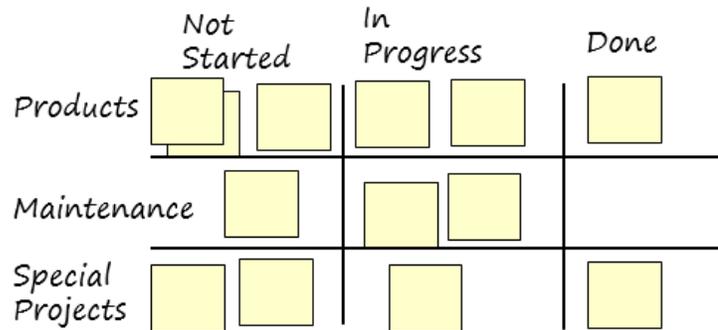
A calendar-driven planning board focuses on deadlines. Sticky notes are placed in the week when they need to be finished. The team “walks the board” weekly (or more often), checking off finished jobs, adding jobs you’ve just discovered, and moving unfinished stickies forward.

The status of the project is very visible all the time.



Flow-driven Planning Board

A flow-driven planning board focuses on pulling jobs to completion through a series of steps or “states”. The progress of the job through the steps is shown visually by moving the sticky note representing the job from state to state.



A flow-driven board helps prevent you and your team from starting too many things at the same time, which in turn helps you finish more jobs more quickly.

Which Type is Right for Me?

A calendar-driven planning board is usually a good match for projects which:

- Consist mostly of deadline-dependent tasks. (e.g. do this task every Monday, this task must be done by Jan 15, etc.)
- Have a lot of dependencies - tasks which can't be started until something else has happened.
- Are fairly predictable – you know in advance most of the tasks which will need to be done.
- tends to get into trouble because people leave too much until the last minute.

Some projects suitable for a calendar-driven board: event planning, planning an annual fundraiser, preparing to move, running an advocacy or outreach campaign.

A flow-driven planning board is usually a good match for projects which:

- Consist mostly of tasks which don't have to be done in a particular order.
- Are not very predictable. You can't easily predict in advance which tasks will be needed to accomplish the larger goal.
- Require considerable research.
- Tend to get into trouble because you have too much on your plate at one time.
- Have many tasks which are started but never finished.

Some projects suitable for a flow-driven board: preventative maintenance, reorganizing your storefront, upgrading your website. Flow-driven boards are good for "multi-stakeholder" projects such as product development and strategic planning.

Let's see how to create and manage both types of Visual Planning Board.

The Basics

Both types of boards start out the same way, with a blank board and a pile of sticky notes. My favorite tools are a 2'x3' foam board, super-sticky 3x3 notes, some tape to use for dividing lines, and fine-point Sharpies in black, red, and green. You may want to work on a whiteboard, a wall, big sheets of paper, or something else. Some people use corkboards and pins instead of sticky notes. Do whatever works for you.

Step 1: Make All the Work Visible

List all the jobs your team is currently working on or planning to start in the near future. Do this by writing each job on a sticky note, like this:



It's important to get all the work represented as sticky notes. Don't skip any!

Step 2: Split the Work into Manageable Chunks

Each job should take no more than half a day. If your jobs are bigger, split them into smaller jobs. This is critical. Visual Planning works only if the jobs are small enough to estimate easily, and to move around easily.



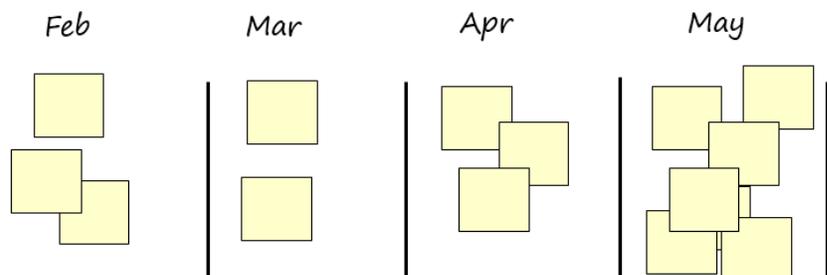
You now have a pile of sticky notes representing your work.

Managing with a Calendar-driven Board

Divide your board up into columns by week or by month and label the columns. Place each sticky note at the "last responsible moment" for that job. "The last responsible moment" is the date by which the job ought to be finished to avoid panic or blocking other jobs.

Now, you probably have a board with a lot of sticky notes piled up at the end, like this:

It's probably not practical to think all those sticky notes will be accomplished in a single month.



As a team, decide which sticky notes could reasonably be done earlier and move those notes.

Now take another look at the board. Each month, does each person have a reasonable amount of work? Or do some have way too much and others too little? Move work between months or re-assign until you're happy.

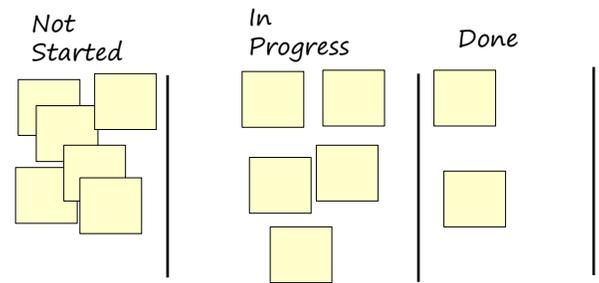
The team meets weekly to "walk the board". Stickies which are done get a green check. Stickies which should have gotten done but didn't are moved forward to the next column. Newly discovered work is added. Then the team looks at the overall board situation and decides whether they need to adjust their workload or their plan.

Managing with a Flow-driven Board

Divide your space into three columns as shown.

Place all the sticky notes representing your work into the correct columns.

You might want an additional column between “Not Started” and “In Progress” for “On Deck” or “Start Next”.



This team meets daily or every few days to “walk the board”, focusing on pulling jobs through to Done. The team starts at the last column, looking at each sticky. What’s almost done? What would it take to finish that?

Then they move to the next column to the left. For each job, what would it take to move that job forward?

If people are jumping from task to task, never finishing anything, you probably have too much work in progress. That’s easy to see on a flow-driven board. Focus on pulling some items into done, and try your hardest not to start anything new until the “In Progress” column has fewer stickies in it. After some time, you’ll probably know roughly how many stickies “in progress” is a good number for your team.

Hints

In either type of board, there are lots of things you can do with the stickies:

- Pink or orange stickies for emergency or “drop-everything-and-do-this” work well.
- Colored dots or other labels to indicate who is responsible for each sticky note.
- For jobs with drop-dead due dates (e.g. send tax forms by Apr 15), write date in red marker on sticky.
- 2”x2” sticky notes for jobs which will take way less than half a day but are critical. (Send extension request to inspection board). Often these also need a red due date!
- On a calendar-driven board, block out vacations and holidays with index cards or large sticky notes, so you can’t put any jobs there.

Learn More

- ☐ Look for more ways to use Visual Planning Boards at: <http://kiberle.com/insights-and-resources/>



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