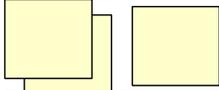
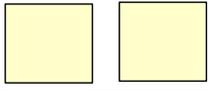
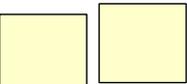
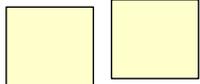




Visual Planning Boards for Small Groups

How to Simplify Communications in Your Workgroup

by Kathy Iberle

	<i>Not Started</i>	<i>In Progress</i>	<i>Done</i>
<i>Products</i>			
<i>Maintenance</i>			
<i>Special Projects</i>			

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Key Points

- A Visual Planning Board quickly communicates the progress and status of your work.
- Visual Planning Boards are easier and faster than other methods of tracking progress.
- A Visual Planning Board often improves teamwork and communication.

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

A Visual Planning Board is a simple, visual method to monitor progress and manage work. Teams using a Visual Planning Board typically spend much less time on writing status reports, inquiring about progress, and figuring out what to work on next. This frees up valuable time to devote to the central work of your organization.

Your First Visual Planning Board

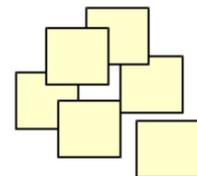
It's best to start with a simple board.

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:



For a team of five to ten individuals, each job should be one to five person-days of work. If your jobs are too big, split them into smaller jobs. If your jobs are too small, group them logically and merge each group into a single larger job.



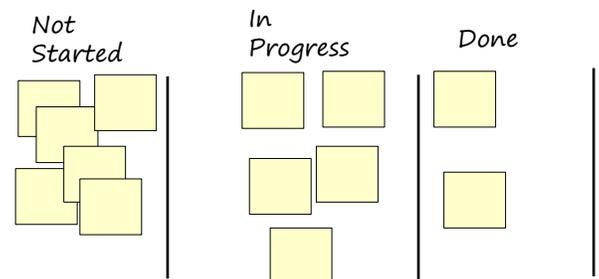
You now have a pile of sticky notes. It's important to get all the work represented as sticky notes – don't skip any!

Step 2: Show the Work Currently In Progress

Find a large space which the whole team can easily see. A white board, a foam display board, or a wall covered in paper will work.

Divide your space into three columns as shown.

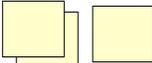
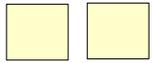
Place all the sticky notes representing your work into the correct columns.



Step 3: Organize the Work by Category

You probably think of your work in groups of some kind. The groups might be projects, or they might be categories as shown here.

Show your groups as rows on the Visual Planning Board. Anywhere from two to a dozen rows will be fine. More than a dozen will make it difficult to quickly read and understand the Visual Planning Board.

	Not Started	In Progress	Done
Products			
Maintenance			
Special Projects			

Start Using Your Visual Planning Board

Whenever new work is requested, place a new sticky note in the “Not Started” column.

Whenever a job is started, move that job’s sticky note from the “Not Started” column to the “In Progress” column.

Whenever a job is completed, move its sticky note into the “Done” column.

Congratulations, you’re using a Visual Planning Board!

Tips

- Make sure everyone knows who is responsible for moving which sticky notes.
- Walk by the board periodically and look at it. Can you see how the work is progressing?

Is Our Visual Planning Board Helping Us?

For the first couple of weeks, update the board at least twice a week. After two weeks, call your team together and ask these questions:

- Is the Visual Planning Board accurately reflecting the status of our work? If not, why not?
- Now that we are using a Visual Planning Board, can we cut back on other forms of status reporting? (Less time spent on status reporting is often the first benefit of a Visual Planning Board.)
- Has the Visual Planning Board revealed any problems or issues?

In most groups, creating and running a Visual Planning Board will expose issues which have been hampering the team all along. The Visual Planning Board simply makes the problems more obvious. Once the problem is obvious, it’s much easier to solve.

Most teams like the simplicity and the concreteness of a Visual Planning Board. They can each see their own work move across the board, and know that others can see their progress also. Moving a sticky note to done brings a feeling of accomplishment. These effects often lead to better teamwork in the end.

Learn More

- ❑ Learn more sophisticated Visual Planning Board techniques which can track who is working on what, and understand and control workload across your team:

Did you like this paper?

Find more like it on the Iberle Consulting Group website: www.kiberle.com

Other papers you might find useful:

- “More Techniques for Visual Planning Boards: How to Make Ownership and Workload Visible”
- “Visualizing Workflow in Your Organization: How to Use States on Your Visual Planning Board”

About the Author



Kathy Iberle has been working with agile software development and Lean development teams for many years. Kathy recently retired from Hewlett-Packard after a multi-faceted career as a developer, quality engineer, and process improvement expert in a variety of product lines. She is now the owner and principal consultant of the Iberle Consulting Group. Kathy has published regularly since 1997, served as co-chair of the Program Committee of the Pacific Northwest Software Quality Conference (PNSQC) in 2009, and participated in the invitation-only Software Test Managers Roundtable for five years.

Kathy has an M.S. in Computer Science from the University of Washington, and an excessive collection of degrees in Chemistry from the University of Washington and the University of Michigan.



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