

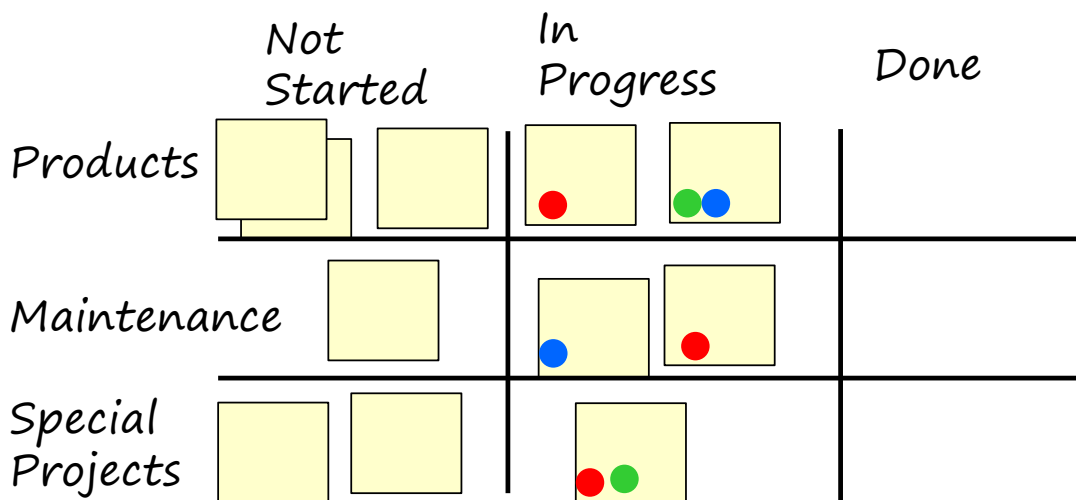


# Kanban and Visual Planning Boards

## How to Manage Your Workload Efficiently

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by Kathy Iberle



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### Key Points

- **Managers can quickly see progress and workload with a Visual Planning Board.**
- **“We Can’t Get Everything Done” might be caused by too many jobs in progress.**
- **When everyone wants everything right now, prioritize by value to the overall organization.**

### What is a Visual Planning Board?

A Visual Planning Board is a simple, visual method to monitor progress and manage work. In the simplest incarnation, work is represented by sticky notes and the status is represented by the location on the board, as shown in the examples below. For a collocated group, the whiteboard/sticky note solution is still one of the easiest to set up, although there are many electronic tools available today as well. You can learn more about Visual Planning Boards in our publication [Visual Planning Boards for Small Groups](#).

### What is Kanban?

Kanban is a simple system to manage the flow of work through a team such that the team is not overloaded and is able to do the most valuable work first. Kanban uses a Visual Planning Board plus a few simple rules to manage the work.

### Understanding Status, or “Who’s on First?”

The Visual Planning Board provides a quick way to answer several common questions.

#### *How many jobs are waiting to be worked on?*

This question is very easy to answer using a Visual Planning Board. Count the number of total jobs in “Not Started”. Jobs can be grouped by category, as shown.

	Not Started	In Progress	Done
Products	2	2	0
Maintenance	1	2	0
Special Projects	2	1	0

#### *Who is working on which job?*

Put a colored dot sticker or a colored mark on each sticky note to represent each individual who is working on that job. This will show at a glance who is working on what – and who might be overloaded.

	Not Started	In Progress	Done
Products	2	2 (1 red, 1 green)	0
Maintenance	1	2 (1 blue, 1 red)	0
Special Projects	2	1 (1 red, 1 green)	0

#### *Make the board visible*

Place the board where your team can easily see it every day, and if possible your management and your stakeholders can see it too. The visibility helps everyone stay aware of how work is progressing and whether the team needs help.

# We Can't Get Everything Done

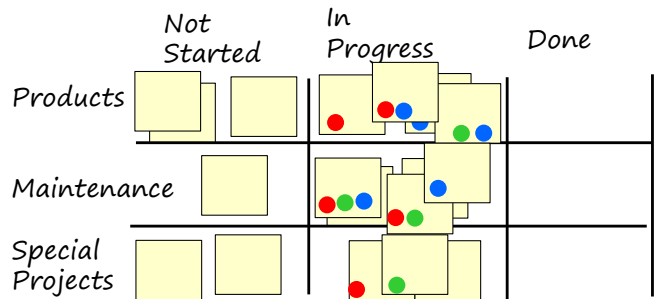
Applying two Kanban rules to your workflow can substantially speed up the progress of work through an organization.

## Minimize task-switching

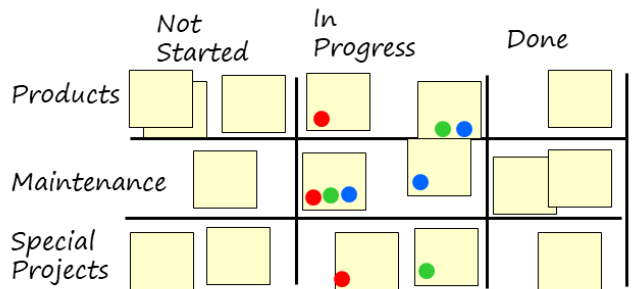
When a human being switches from one job to another during the workday, a certain amount of time is invested in unloading the first job and loading the second job into their brain. Research shows that the task-switching time can be as little as fifteen seconds for simple routine work to as much as fifteen minutes for complicated intellectual work. The task-switching time is wasted time – it's not effectively applied to either job. When people must switch their attention from job to job repeatedly all day long, those little bits of time add up quickly to a significant amount of wasted time. If instead, a person works on only a couple of different jobs during a given day, he or she will get a lot more done.

The first rule of Kanban, "Limit Your Work In Process", addresses this problem. Here's how it works:

1. Track which people are working on which jobs, using colored dots or marks as described above.
2. Count how many items each individual is working on, as shown here. This total is known as the person's *Work-in-Process*.
  - o Green: 4
  - o Blue: 4
  - o Red: 4



3. Choose a sensible Work-in-Process (WIP) limit. For jobs requiring concentrated attention, two or three per person is a good limit.
4. Now comes the hard part. *Stop starting new jobs* until enough jobs have finished to bring most individuals down to your desired WIP limit.
5. Once the workload is at or below the WIP limit, keep it there. Don't start a new job until a job in progress finishes.



The WIP limit prevents wasting so much time on task-switching. Your people will be spending that time on their actual work instead, so the number of jobs finished per week will go up. In addition, people are happier.

# Everyone Wants Their Job Right Now

## Do the most important work first

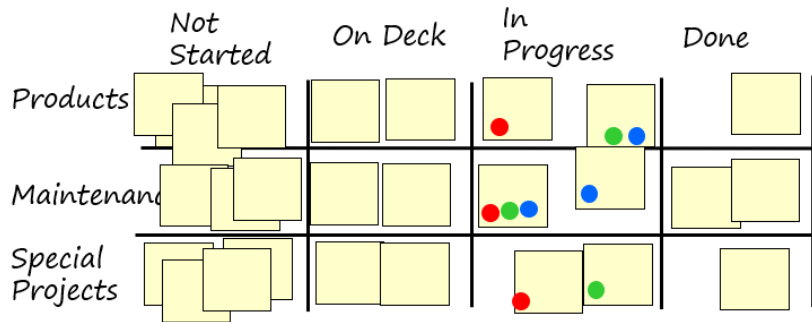
Typically, the "Not Started" column contains a vast number of jobs, ranging from critical fixes to nice-to-have. Who decides which jobs to start? How do we minimize the time spent debating this?

The second rule of Kanban is "Do the most valuable work first". Kanban acknowledges that the relative priorities of jobs change over time. Every two weeks, all the jobs in "Not Started" are reviewed by a group of stakeholders appointed by the management. Each stakeholder is expected to understand how the jobs he or she has submitted will benefit the organization, *and* the group as a whole is expected to make trade-offs amongst themselves for the benefit of the entire organization. The group balances the time needed for a job against the value delivered by that job.

The implementation team is expected to estimate the time needed for the job. Since the estimates are used primarily for comparisons, a simple Small-Medium-Large classification is usually accurate enough. The team is also expected to estimate the number of jobs they expect to be able to complete before the next stakeholder meeting.

The stakeholders collectively choose a set of jobs whose total size doesn't exceed the capacity of the team, and those jobs move into "On Deck" as shown here.

Whenever the team finishes a job, they pull from the "On Deck" column. Anything left in "On Deck" at the time of the next stakeholder meeting goes back into "Not Started" so the stakeholders can consider whether that is still the most important job for the organization.



### Plan Smaller Jobs

This system runs pretty well, but it runs much better when nearly every job is small enough to complete before the next stakeholder meeting. This reduces time spent on replanning, reprioritizing, and task-switching.

This means a large job should be split into two or more smaller jobs if possible. Each of those smaller jobs must deliver something usable on its own. For instance, a major website reorganization might be done in two or three stages.

It is challenging at first to split up jobs, but with practice it gets easier. Asking "what's the minimum we could do that would be useful" will often help. Delivering the minimum as usable features has a hidden advantage - sometimes the requestors are happier than they expected with just the minimum and never ask for the rest at all!

## Kanban and Visual Planning Boards

A Visual Planning Board coupled with a few simple Kanban rules can significantly improve the capacity of a small team, the overall value delivered to the organization, and make everyone's jobs easier all around.

Learn more by reading *Kanban: Successful Evolutionary Change for Your Technology Business*, by David Anderson, 2010.

### Did you like this paper?

Find more like it on the Iberle Consulting Group website: [www.kiberle.com](http://www.kiberle.com)

Other papers you might find useful:

- "Visual Planning Boards for Small Groups: How to Simplify Communications in Your Workgroup"
- "Visualizing Workflow in Your Organization: How to Use States on Your Visual Planning Board"



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