

# Process Design Worksheet Part 1: Defining your process

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How to define your team's process in 7 easy steps



## QUOTEWORTHY

*“We should work on our process,  
not the outcome of our processes.”*

– W. Edwards Deming



## What is process design?

Process design is the process of identifying and sequencing each of the steps in a process to optimize for efficiency and effectiveness. Simply by defining the steps in your process, you can begin to recognize redundancies, inefficiencies, areas of risk, and other opportunities for improvement.

## Why should you define your process?

A well-designed process can mitigate risk, reduce waste, improve consistency, improve work quality, speed up delivery, and improve collaboration within teams.

Conversely, a poorly designed process – or an ill-defined one – can leave a team vulnerable to miscommunication, misunderstanding, inconsistency, and frustration. Visualizing your process on a Kanban board can bring your process to life, and help you identify further opportunities for improvement.

## How to get started

Defining your process is a little more involved than most people realize. But fear not! This worksheet is designed to guide you through visualizing your team's process on a Kanban board – one step at a time, by using LeanKit.



## Tips for using this worksheet

### **Build as you go.**

You'll get the best results if you create your board in LeanKit and add cards to your board as you complete this worksheet.

### **Define first, refine later.**

This worksheet (Part 1) is intended to help guide your team through defining your process and visualizing that process on a LeanKit board. You'll learn about board hierarchies and how to refine your process in Part 2.

### **Start where you are now.**

Remember that your goal should be to accurately define your current process first, before you start trying to improve upon it (that will also come in Part 2!).

### **Balance your time commitment.**

Don't feel as if you need to finish this worksheet in 15 minutes – or as if you need weeks to complete it, either. Pick a week, set up a few quick meetings with your team, and work together to answer the questions and design your board.



**Let's go!**

**Read on for tips,  
inspiration, and  
a workspace for  
defining your  
team's process.**

# 1 Define your team.

It's important to define the scope of the process you're trying to define. Typically, individuals who work together closely on a majority of their work items (AKA teams) will follow a similar process, and they will manage that work on a shared Kanban board.

Resist the temptation to create individual boards within a single team, which can decrease visibility and discourage collaboration.

On the other hand, avoid including the work of too many people on a single board. If you find yourself trying to oversimplify your process to accommodate everyone, you might need to split up into a few boards.

## **ACTION ITEM**

Define the scope of your process, initiative, or project.  
Who follows this process? What kind of work do they do?

Ex: Customer orders are handled by the fulfillment team, who receive requests from customer support. Fulfillment is struggling to process orders in a timely manner, largely due to lack of visibility between departments.



## 2 Set a goal.

Getting clear around your objectives can help everyone get “on board” with your efforts to visualize your process. What are you hoping to accomplish? Is it faster delivery, clearer communication, better capacity allocation?

Be sure to think about everyone who you defined in step 1, and make sure that their objectives are included as well.

### **ACTION ITEM**

Identify your main objectives for wanting to improve how you work.

Ex: faster deliver, clearer communication, better capacity allocation



# 3 Start with the basics.

Every process follows the same three basic steps: To Do, Doing, and Done. This is how Kanban boards are set up, with To Do on the far left, and Done on the far right. Most teams will have sub-steps within each of those steps, but that will come later.

First, it can be helpful to use your team's language when defining your process. Your team might have more specific terms you can use for To Do, Doing, and Done.

For example, if your team handles order fulfillment, To Do might be better described as "New Orders," and Done might be more accurately called "Order Fulfilled."



## ACTION ITEM

How does your team define To Do, Doing, and Done? Customizing these basic process steps with more specific titles can help you start to define your process.

TO DO

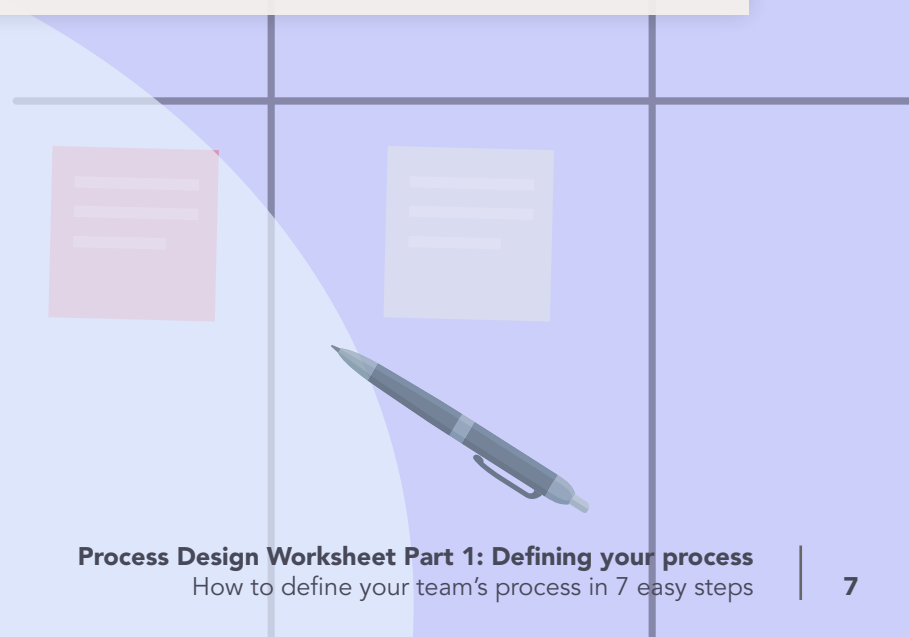
DOING

DONE

Ex: New Orders

Ex: In Process

Ex: Orders Fulfilled

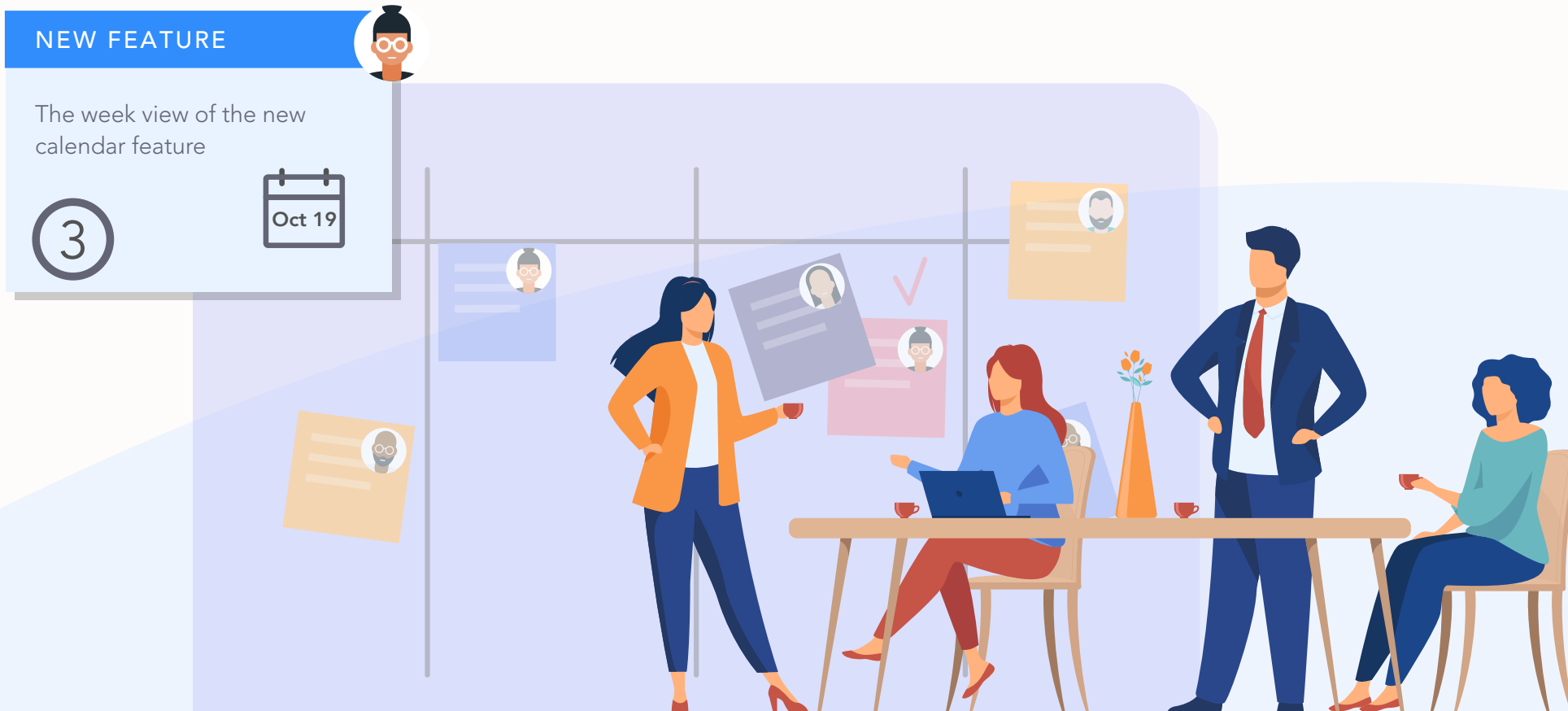


## CARDS AT WORK

Most teams do at least a few different types of work. For example, a development team might build new features, handle break-fix work, and perform maintenance tasks.

In Kanban, each of these individual work items are represented by cards.

Card types can be used to visually differentiate between the different types of work; so, for example, the dev team might use blue cards for new features, red cards for break-fix tasks, and purple for maintenance tasks.





# 4 Determine card types.

Defining each of the main types of work your team routinely does can help you design a process that aligns with each of those work types.

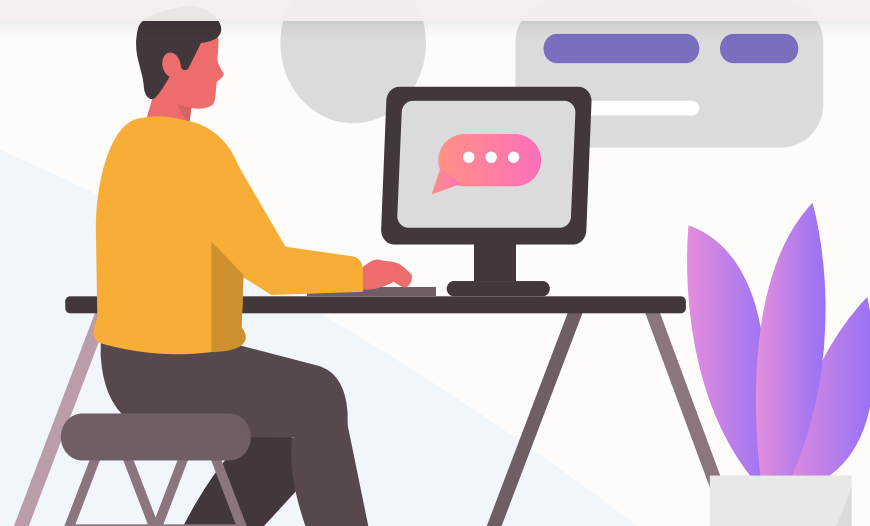
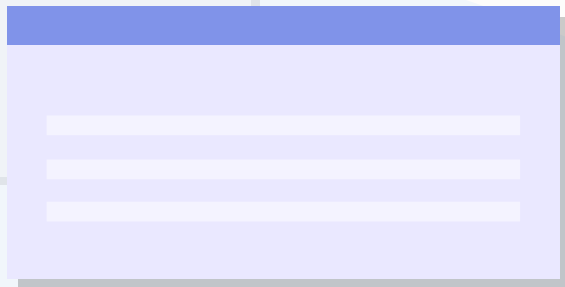
Focus on the frequently performed, or routine, types of tasks performed by members of your team. Tasks that happen infrequently or sporadically can all fall into a "Miscellaneous" card type.

## ACTION ITEM

What are the main types/categories of work your team performs? Fill in each of the "card types" below with a title and description of the types of work your team performs.

Ex: New Order  
This request is a new customer order

Ex: Exchange  
This request is a returned item that needs processing



# 5 Assign card attributes.

On your LeanKit board, you'll be able to communicate key details on the face (front) of the card using visual signals, also known as card attributes.

Card attributes might include:

- **Card assignments:** Who's responsible for the work?
- **Due dates:** When is the work due?
- **Custom icons:** What other ways do we need to categorize our work or communicate work status?
- **Tags:** What other ways do we need to label our work items?

Leveraging card attributes can also make your board searchable. You can filter your board by any of your card attributes to quickly view all the cards with a specific attribute or tag.

## ACTION ITEM

What are the different ways you want to filter the cards on your board? What information is most important to communicate within your team?

Example: Due dates, card assignments, and geographic territory



# 6 Identify sub-steps in your process.

Within each of the broader categories of To Do, Doing, and Done, most teams have more granular steps that their work typically follows.

Within Doing, for example, you might have a Plan, Create, Review, and Deploy step if you work on a marketing team that regularly publishes a wide variety of content.

As you talk through your sub-steps as a team, try this: Think about a recently completed piece of work, and work backwards to determine what steps that work went through to go from To Do to Done.

## ACTION ITEM

Brainstorm all of the sub-steps that fall into each of the main process categories of To Do, Doing, and Done, in the order that they occur.

TO DO	DOING	DONE
Ex: Ideas	Ex: Backlog	Ex: Ready to Start



# 7 Define where handoffs occur.

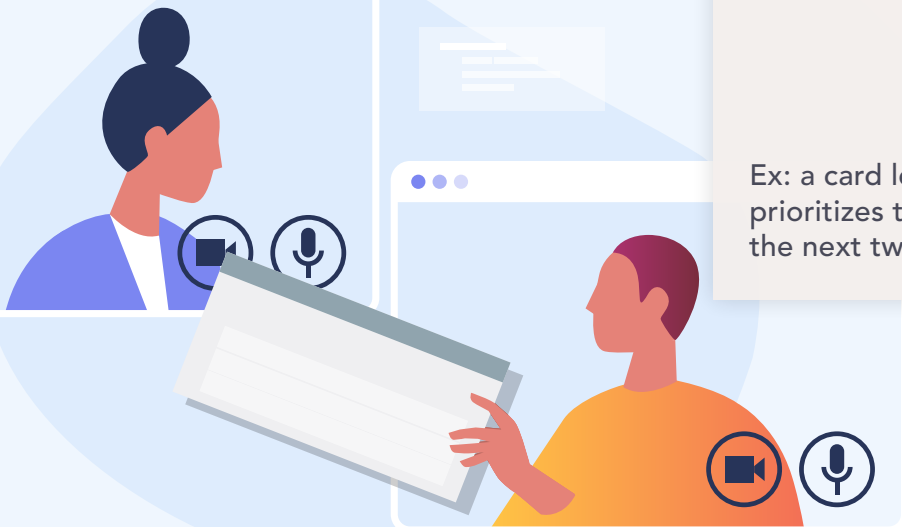
Between each of the steps in your process, there are handoffs – inflection points that define when one step ends and another begins. Often, these handoff points are a source of significant waste within team processes, because this is where work will sit idle.

This is why it's important to align around where and when these handoffs occur, so that the team can work together to keep work moving forward through the process.

## ACTION ITEM

For each of the process steps that you identified in step 6, identify when that step begins and ends. In other words, when does a card enter each lane? When does it exit? Who moves it?

Ex: a card leaves "Ideas" and enters "Backlog" when the team accepts and prioritizes the work; the card leaves the "Backlog" when work will start within the next two days



## Next steps

Pop the bubbly! You have officially defined your process. If you've been designing your board in LeanKit as you completed the worksheet, you have a shiny new Kanban board, too.

Don't have a board yet? No problem. You can use your worksheet answers to quickly set up your team's Kanban board in LeanKit and begin using it to visualize and manage your work.

Need to get back to your board?

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 [START YOUR FREE 30-DAY TRIAL](#)

If you're eager to take your LeanKit board to the next level,  
then check out part 2 of the process design series!

***Process Design Worksheet Part 2: Testing and refining your process***

 [GET THE WORKSHEET](#)

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