Process Design Worksheet Part 2: Testing and refining your process

Moving beyond basic board setup and into continuous improvement

QUOTEWORTHY

"Perfection is not attainable. But if we chase perfection, we can catch excellence."

– Vince Lombardi

Your process in progress

In the first worksheet of this two-part series, we walked you through how to define each of the steps in your process.

When you define the steps in your process, you begin to recognize redundancies, inefficiencies, areas of risk, and other opportunities for improvement.

Now we're going to focus on what happens next – finding opportunities to refine your process, so you can continue to improve the way you work.

Why should you refine your process?

Your team's process is a living thing. It evolves and grows much as your team does.

Your team's Kanban board, therefore, is not something that you "set and forget," but rather, something that you continually look to improve and adapt to best meet your team's evolving needs.

How to use this worksheet

Each of the steps in this worksheet includes a **short commentary** and one or more **action items**.

The action items are paired with **discussion questions** and a **workspace** designed to help your team quickly put the concepts into practice – in ways that are personalized for you.

What you'll need

1. Your team
2. Your LeanKit board
3. All of your team's work on the board

7 steps for testing and refining your process

1. Check your board health
2. Pick a few bottlenecks to analyze
3. Identify areas for improvement
4. Talk through how the board is working
5. Check for hidden work
6. Revisit how you track your work
7. Decide if you need to add another board

Extras

Learn the 5 Whys technique p. 7-8

Resources for each step p. 16

1 Check your Board Health.

How do you know if the work on your board is moving through your process smoothly? In other words: How can you tell if your process is working efficiently or not?

Luckily, if you've been using your LeanKit board for more than a day or two, you have been generating data that can help you find your answer!

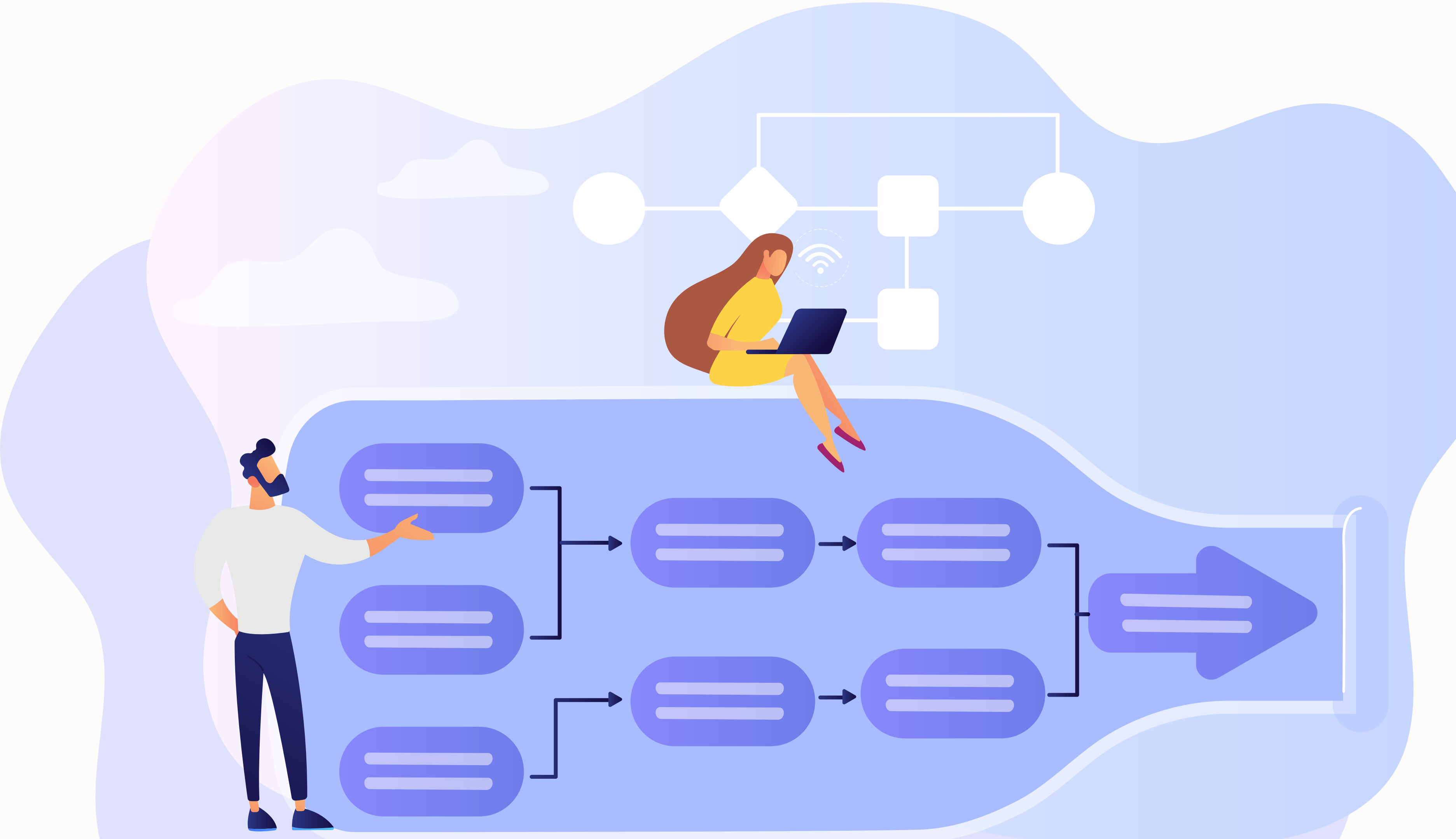
The Board Health panel in LeanKit contains three widgets that allow users to easily see whether their teams and processes have been improving or worsening: Bottlenecks, Work in Process (WIP), and Card Throughput.

ACTION ITEM

Open your LeanKit board and press the H key on your keyboard to launch the Board Health panel. What are the first few things that stick out to you as opportunities for improvement based on what you see? Write them here.

YOUR PROCESS IN SIGHT

Bottlenecks are the places in your process where work slows down or stops. There are many reasons why bottlenecks occur, and they're not always obvious – but it's important to identify the root cause of your bottlenecks in order to effectively resolve them.



2 Pick a few bottlenecks to analyze.

The Five Whys can be a helpful tool for identifying the root cause of any problem, including bottlenecks in your process.

The concept is simple: State your problem as a statement (i.e., *Work keeps getting stuck in our Testing lane*) and then ask "Why?" until you feel you've identified the root cause.

It might take two "whys" or 10 to get to your final answer – the point isn't to ask the question five times exactly, but rather to ask it more times that you usually would.

ACTION ITEM

Pick a few of the bottlenecks identified in your Board Health panel. With your team, use the Five Whys technique below to identify the root cause of **each of the bottlenecks**, documenting each of your responses. Make sure that your team agrees upon each response before moving on to the next one.

Bottleneck 1

State your problem as a statement.

Why?

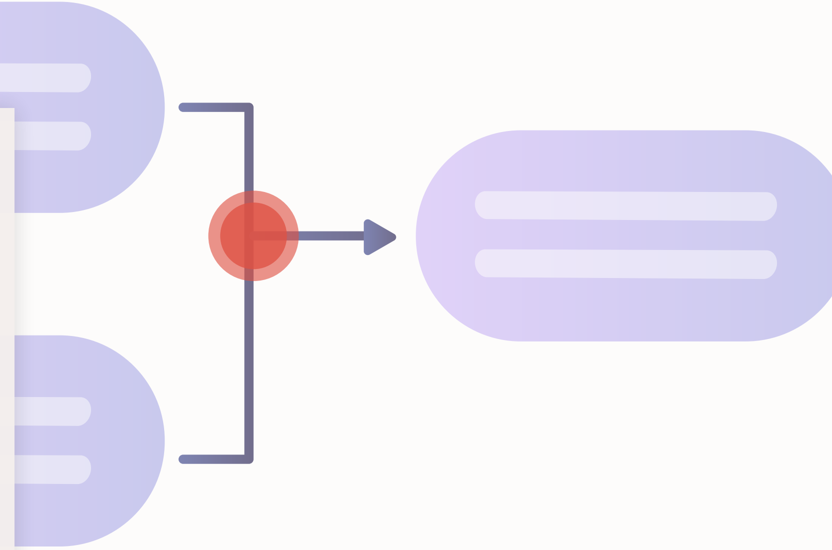
Why?

Why?

Why?

Why?

Use this space to analyze additional bottlenecks with the 5 Whys technique.



Bottleneck 2

State your problem as a statement.

Why?

Why?

Why?

Why?

Why?

Bottleneck 3

State your problem as a statement.

Why?

Why?

Why?

Why?

Why?

3 Identify opportunities for improvement.

In step 2, you used the Five Whys to identify the root cause of one or more bottlenecks. Now it's time to start "solutionizing" to work to fix those bottlenecks!

There are many reasons why bottlenecks can occur. One of the more common reasons is that some sub-steps are not visualized, causing work to "sit" in certain lanes longer than expected.

This could be happening because the scope of the work being done in that lane is bigger than the lane title might suggest.

ACTION ITEM

Look through the bottlenecks you've identified in your process and the cards that have recently gotten stuck there. Discuss these questions as a team, and then modify your board as needed: Are there any steps that are not currently being visualized? Can we add a lane to better visualize the steps that the work is taking? Add vertical lanes to clarify steps in your process. Add a horizontal "swimlane" if your team has identified card types that follow a different process but are still considered part of your team's work.

4 Talk through how the board is working.

Board Health can provide invaluable insights into your team's performance that can help guide your continuous improvement efforts.

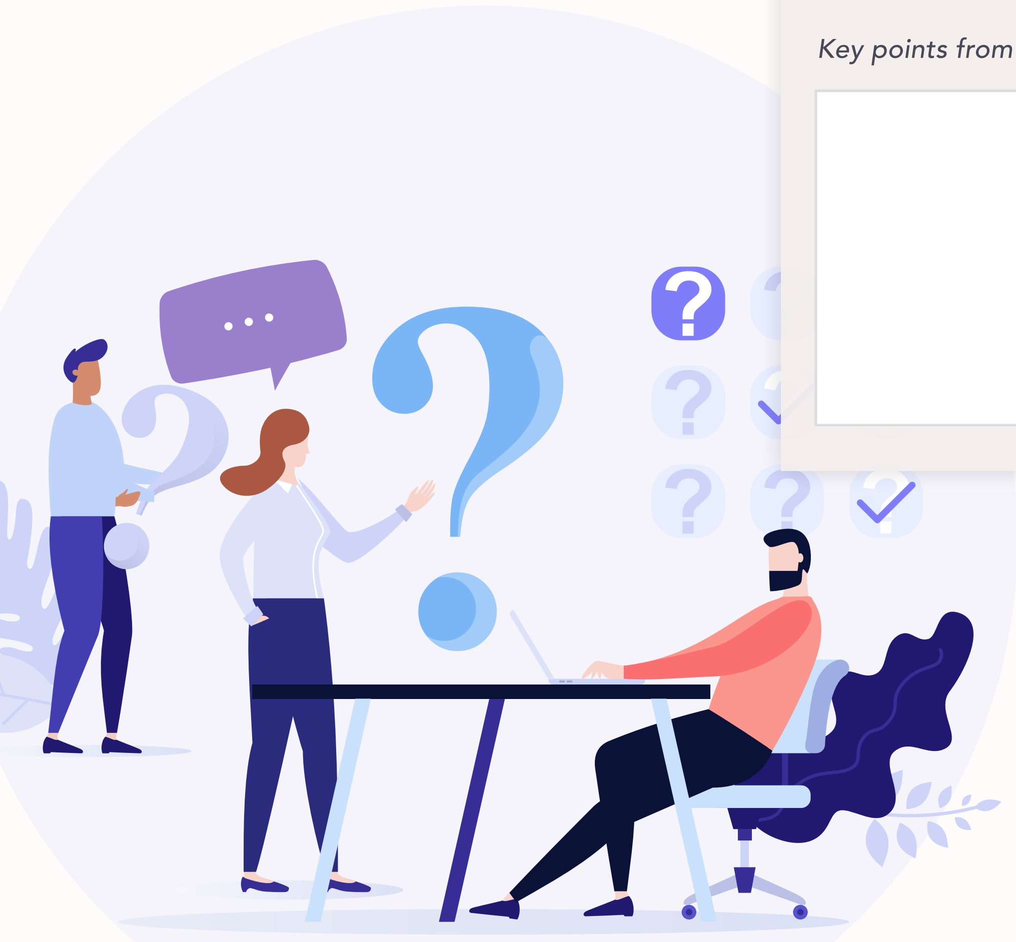
But in addition to this quantitative data, it's important to also gather qualitative data about how your board is working for your team.

ACTION ITEM

As a team, talk through each of the questions below.

1. How are we feeling about our Kanban board?
2. What do we enjoy about using our Kanban board?
3. What is frustrating?
4. How has our communication been impacted by using our Kanban board?
5. Where could we benefit from additional communication or information?

Key points from your discussion



QUOTEWORTHY

"You can't manage what you can't measure."

– Peter Drucker

5 Check for hidden work.

Getting all your team's work on your Kanban board is essential for getting an accurate picture of capacity.

Hidden work can make your board metrics inaccurate and can make it difficult to truly understand how to improve your process.

It's important to visualize all of the work being done on your team, even work that:

- Only involves one person
- Is improvement-related
- Is quick/not expected to take much time

ACTION ITEM

Ask each team member to think through any work they've done since using your board that they didn't visualize on the board.

If the work is still in progress, add a card to the board to visualize the work. If the work has already been completed, don't add it to the board (so you don't throw off your board metrics), but talk through why it wasn't added to the board. Is it because there wasn't a card type for that type of work? Did it seem irrelevant to the rest of the team? Share your answers in the space below.

6 Revisit how you track your work.

In the first worksheet of this series, we introduced card types and card attributes. You'll get the most value out of your card types and attributes if you use them consistently across the team – so here's an activity to test whether your team is using them the same way!

Encourage your team to call out answers, so you can hear everyone's honest answers. Listen for any inconsistencies and discuss them as they arise.

Then, as a team, talk through whether there are any attributes that you aren't currently using that would be helpful for you to use.

ACTION ITEM

Look through the cards in your backlog. Select one card to do a "card attribute" lightning round. Read the card title out loud, and then ask your team:

- What card type would you assign to this card?
- Would you add a due date?
- What details would you add to the card description?
- What tags would you add to this card?
- What custom icons would you add to this card?

Share any ideas you have in the space below.

7 Decide if you need to add another board.

In the first worksheet, we encouraged you to build a board that worked for your team. But what about work that involves other teams, or goes beyond the scope of your board?

In LeanKit, you can connect work items on different boards through connected cards.

You can also connect related boards, to give each level of the organization the right amount of information – such as an organization-wide board where you visualize major initiatives, and then team execution boards that help teams manage their work at a more granular level.

ACTION ITEM

As a team, think about any work items you've had that have involved people outside your team. How did you visualize that relationship? Would connecting cards on your board to cards on another board help to provide more visibility for everyone involved?

Would you or your stakeholders benefit from a board that shows a birds-eye view of your team's work? How would you differentiate between the two boards?

Are there any other issues you've uncovered that might benefit from an additional board?

Key points from your discussion

Your process – tested and refined!

Congratulations! By analyzing your bottlenecks and diving deeper into how your board can work better for your team, you've officially embarked on the ever-important journey of continuous improvement.

What's next? It may sound simple, but the best thing you can do now is to keep finding ways to improve – not only your process but also how you work as a team. The more you act on the mindset of "progress over perfection," the more you'll find opportunities for exceptional growth.

Need to get back to your board?

LOG IN TO LEANKIT

Design your board in LeanKit

START YOUR FREE 30-DAY TRIAL

To experience all that the continuous improvement journey can offer you in LeanKit, learn about analytics and reporting!

Understanding Analytics: Reports Overview

READ THE GUIDE

Resources

Dig a little deeper into the main topic of each step in this worksheet with these helpful resources.

Step 1
Identifying Bottlenecks Using Queue Lanes

https://blog.planview.com/identifying-bottlenecks-using-queue-lanes/

Step 2
5 Whys of Lean

https://www.planview.com/resources/guide/lean-principles-101/5-whys-of-lean/

Step 3
What are Kanban Board Swimlanes? And How to Use Them

https://blog.planview.com/what-are-kanban-board-swimlanes-and-how-to-use-them/

Step 4
Kanban Principles for Virtual Teams

https://www.planview.com/resources/guide/kanban-project-management-virtual-teams/kanban-principles-virtual-teams/

Step 5
Time Theft: How hidden work and unplanned work commit the perfect crime

https://blog.planview.com/time-theft-how-hidden-and-unplanned-work-commit-the-perfect-crime/

Step 6
What is a Kanban Card?

https://www.planview.com/resources/guide/introduction-to-kanban/what-is-a-kanban-card/

Step 7
How Can I Visualize Dependencies with Connections?

https://success.planview.com/Planview_LeanKit/Cards/Connections/How_Can_I_Visualize_Dependencies_with_Connections%3F

EXTRA CREDIT

Filter Cards on a Board
Learn how to filter cards on your board to only display cards that meet a certain criteria.

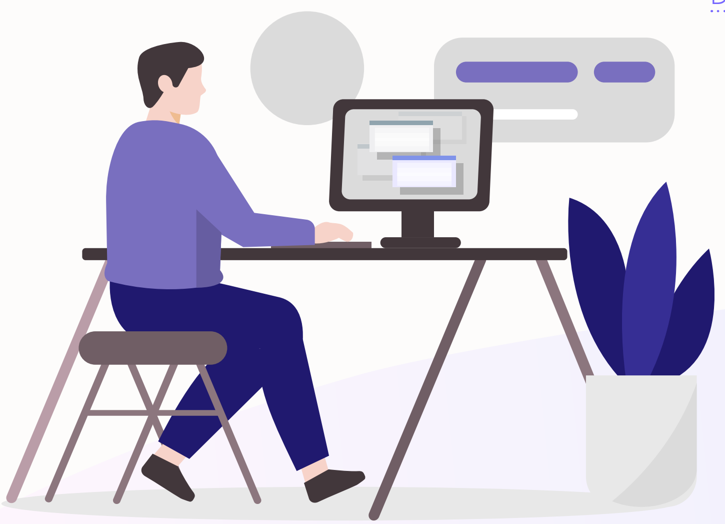
https://success.planview.com/Planview_LeanKit/Cards/Managing_Cards/Filter_Cards_on_a_Board

WIP Limits: How to Journey Safely into the Unknown
Learn the what, why, and how of WIP limits in this three-part blog post series.

https://blog.planview.com/wip-limits-how-to-journey-safely-into-the-unknown/

Lean Metrics to Improve Flow
Get a quick introduction to seven important metrics that measure process flow.

https://www.planview.com/resources/guide/what-is-agile-program-management/lean-metrics-improve-flow/



About Planview

Planview® has more than 700 employees worldwide serving 3500 customers and 1 million users. The company drives the industry via its dynamic culture of innovative technology leadership, deep market expertise, and highly engaged communities. Become that dynamic, adaptable entity that not only survives, but thrives. Learn more at Planview.com.