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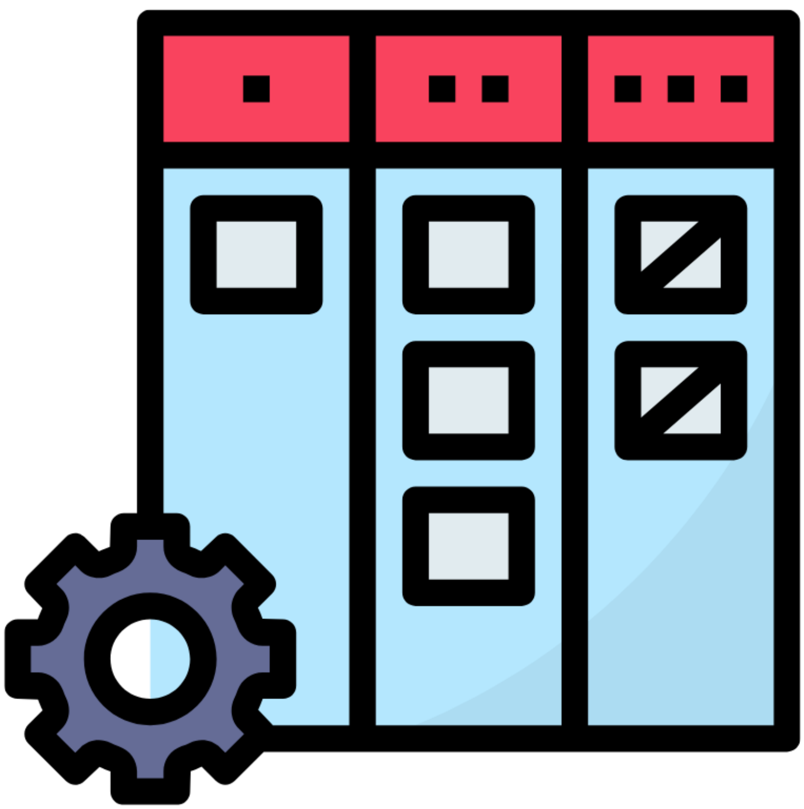
Manage Your Workflow

Implementing KANBAN



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Step 1: Visualize Work

- ❑ Identify the steps in your workflow. Create a column for each step.
- ❑ Map this with your team, those individuals responsible for doing the work.
- ❑ Identify the work activities (tasks) and create a card (post-it) for each task. (Include your work for the next 10-30 days. Decide this when talking about workflow.)
- ❑ Decide on the type of board you will use and where it will be so everyone can see it during the day.
- ❑ Decide what information you'd like on each task card. Minimum: What, When and Who owns this.
- ❑ You can use different color cards for work type, due dates and or other categories.
- ❑ Have Red Dots/ Marker available to note when tasks get stuck.
- ❑ Include the legend with the necessary policies/ definitions.

Questions to consider once your workflow is mapped:

- ✓ What happens when someone is out – who picks up the task?
- ✓ Which process step takes the most time?
- ✓ Which step has the most tasks in it?
- ✓ Does some work skip a column; is that step essential to the workflow?
- ✓ Are there tasks that take more time and should have a new column?
- ✓ What other information might be helpful to include in your task cards?
- ✓ Did marking the cards with red dot or star move that task along?

Discuss the above questions, write out the solutions your team agrees to. Remember to hold a review of the process. More on this in the Feedback Loop step.

Step 2: Work in Progress

Write down all the projects/tasks you are working on. (WIP)

Use the following chart to evaluate each project.

PROJECT	TYPE OF WORK*	STATUS IN DEVELOPMENT IN REVIEW COMPLETED	FOLLOW UP/ RESOURCES NEEDED	HOURS REQUIRED TO COMPLETE IT

* **Type of Work:** *Quality, New product/ service, Staff development, Request, Requirement, Complaint, Maintenance, Other.*

Defining the types of tasks that are mapped, can be helpful as you group tasks according to time required, impact or risk.

Tips for Your Board Design

Most boards are some variations on the most basic stages of work: To Do, Doing, Done.

Variations on "To-Do" include 'Ready to Go,' 'Que.'

Backlog You may want to have a column before "To-Do" to represent those items that are backlogged. It is helpful to have a strategy/ policy on how to handle backlogged items and how to decide on what work gets into the "Que."

"Done" This also requires an explanation. What does it mean and where do projects go after it is complete? Remember every project needs to have a review to look at how things went and what might be done in the future to make the process smoother, more consistent and better.

Notes:

Step 3: Manage Flow

Managing flow is a principle of Kanban. It is designed to shift the focus from people to the work. By understanding workflow, you can design a process to get work through the system much faster. This focus on managing the process rather than managing people and keeping them busy all the time, helps you deliver faster.

Kanban's focus is on the workflow. As you map this out you become aware of the blocks and bottlenecks. Kanban's tagline could be: work on your problems first before going on to new work.

Workflow should maximize the delivery of value and minimize lead time (wasted time).

Time is the only resource that cannot be replaced.

This step looks at the cost of delay: the lost value by delaying implementation in the desired time frame.

Value is defined by the customer and therefore a key element in managing flow. There are other important elements such as: quality measures, delivery rate and predictability.

Blockages and Bottlenecks

As you map the flow of work you will identify bottlenecks and may reveal blockages – these are work activities that cannot be completed because they may be waiting for someone from another department to complete this piece, or there is a delay due to another issue. For example, if you are tracking patient flow, you may find the patients bottleneck while waiting for physician orders.

You can set up a "buffer" column and arrange for the physicians to come at certain times during the day to write the orders. This keeps the workflow moving.

Bottlenecks are analyzed and reviewed with the entire team to coordinate demand with throughput. The goal is to optimize throughput vs "keep everyone busy."

When people simply start working on the next item without addressing the bottleneck, they may not be working on the most important task, and the issue can be pushed out of sight and ultimately forgotten.

Suggestions to contain the bottleneck:

Do not ignore it. The breakdown in workflow has a ripple effect and should be evaluated.

Explore the quality of the work prior to bottleneck. Is work coming in ready or are there unintended errors or quality issues that are slowing down flow?

Manage WIP limits. Are your limits on the work you have in the pipeline allowing for consistent flow? If that stage of work does not have a WIP limit, consider setting one.

Process work in small batches (when possible). You may save time by organizing small batches of work.

Adding in more people and or resources is not always the answer, especially when there are other problems in the work stages or activities. Look for other ways to increase throughput and capacity, because as soon as you add inn more people, bottlenecks will show up again if these other issues are not addressed.

Workflow is ideal when there are minimal interruptions and work is pulled into the system using the WIP limits.

Analyzing your bottlenecks is part of the Lean continuous improvement concept. As work demands increase at such a rapid pace, you need a system in place to evaluate any new blocks or barriers to meeting goals.

Make a note of any bottlenecks or red tape you are aware of in your workplace.

Step 4: Make Policies Explicit (Find Common Goal)

When you plan your Kanban, you will be writing up policies to define the terms of the process. These policies are included in the Legend on the Kanban board, so everyone understands expectations and parameters of the work.

Policies would include the definitions of "Done," "Capacity," etc. This gets discussed and determined in the Strategy Review Meeting where your Kanban system is set up. These policies may be updated as needed. They are placed on the board as part of the legend so everyone understands the terms and expectations around work.

Examples of policies:

"Items in the Review Column should require no more than 3 days."

"Capacity for the A team is defined as 20 cases per shift."

"Items can't enter "Test" column until they have been reviewed."

The feedback meetings are where the status and progress are communicated. The board itself serves as a communication tool.

Think about the meetings you are holding, are they giving you the type of information you need? Make a list of all your meetings and how effective they are.

Step 5: Feedback Loops

Communicating progress, status and problems is part of a continuous improvement process. The following are suggested meetings to specifically address the type of feedback that is vital to a successful change effort.

Strategy review – initial meeting to map workflow and define your Kanban system. This meeting sets up your goals, purpose and defines the workflow.

Daily Huddle – this daily standup meeting covers the workflow and highlights any blocks, bottlenecks, or other workflow issues. Short, 15 minutes maximum, answering the questions: *What I did yesterday, What I am working on today and What is next.*

Operations Review – explores resources from other departments and explores delivery of value. This might meet weekly or monthly depending on time to delivery.

Service Delivery Review – explores the effectiveness of a single service and seeks to improve it. This might be a retrospective type meeting to evaluate actions taken or an initial meeting to set up the improvement plan.

Backlog Triage – this may be a weekly or monthly meeting depending on the workflow cycle. The terms of the backlog and the flow into the work is set up in the Strategy Review. It is important to discuss and assess how this process is working and what changes may be needed.

Delivery Planning – This meeting plans deliveries to customers and monitors the process. This may be combined in another meeting and frequency depends on work cycles.

Retrospectives – these meetings are at the end of any process to review how it went and what might be done next time to improve it.

What meetings do you need to hold more of and those you can cancel. Write them out.