Simplify Your Project Delivery

How to get the right work done at the right time – without spending your life in meetings

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Projects In Less Time
Taming project complexity

Table of Contents

Projects out of control **4**

Why simplify? **5**

Collaboration calls for clarity **6**

The Visual Project Board (VPB) 7

A VPB promotes action 8

But a VPB is not... 8

How to create a VPB **9**

Developing a VPB 10

Defining the columns 11

Defining the rows 12

Defining the cards 13

Case study – multiple, similar projects **14**

Case study – one project **16**

Your process is simplified, now what? **19**

Identifying risks 19

Maintenance / updates 20

Lessons learned **21**

The next step: build your collaboration process 21

Why build a VPB? **22**

Eager to learn more? **23**

What is Visual Project Management? 23

About the author **23**

Other eBooks written by Mark: 23

Projects out of control

You'd never drive looking in the rear-view mirror…

Would you?

Maybe if it's a straight road, with no traffic, and blue skies ahead. Even then, it would be very unsafe, and you wouldn't be able to go very fast.

It's the same with projects. You can't go fast looking at the past.

Managing a project team during delivery often seems like driving while looking in the rearview mirror. Just collecting status information is a chore.

"Why do we have so many meetings?"

"Why do we spend so much time doing status reports?"

"The meetings we have are not productive; by the time we figure out what *has* been done, we have no time to figure out what *needs* to be done".

The trick of driving your projects while looking in the rear-view mirror is complicated by the fact that you can't see everything. It's a small, dirty mirror. It's hard to see the critical information. There's so much detail, that it's nearly impossible to find and act upon what's relevant.

We rarely feel like we're *fully* in control. More than once, I've been told by project owners, "I have no idea whether we're in trouble or not." They don't know because the project managers don't know.

Then there is the communication problem. Sharing information about a project is sometimes like the telephone game; the critical information is there, but it's distorted, or the core message never makes it to the right person for action. Project Managers spend more time repairing communication errors than moving the project ahead.

All this activity is about the *past*. Things we cannot change. How can we get things done tomorrow when we're spending time on what happened yesterday? How to find the needle of information in the haystack of data, while communicating clearly with our team and stakeholders?

Without visibility into the process, teams don't know where the problems are. Where to focus. What to prioritize. Determining whether their projects are on time. When they can't agree on where they are and what to do, they certainly can't communicate effectively. They stop functioning as a team and this leads to last minute surprises. Costly surprises.

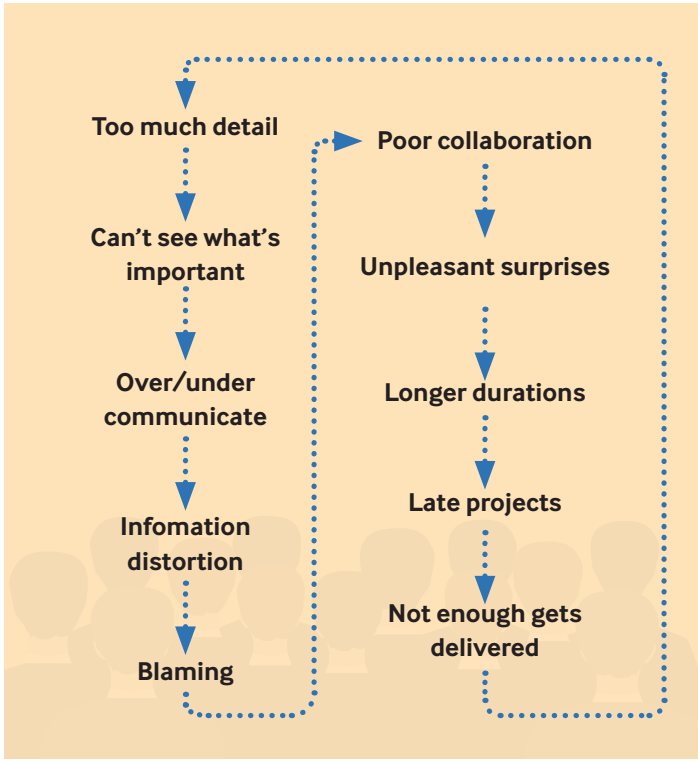
Why simplify?

Different stakeholders need different kinds of information. How can we clearly communicate the status and needs of the project? Give direction on the action needed? Give problem solvers the information they need to keep things on track?

Project managers have detailed plans that are hundreds, or even thousands of lines long, but more detail won't help us see the real risks in the projects. Which task is the one that needs our attention right now? Do we have enough resources to stay on track? What can we do now that will save us later?

This communication problem–knowing the who, what, when, and why – blocks collaboration and teamwork. It creates a cycle of bad behavior and results that is hard to break. We can't see clearly where we are or what's needed.

Everyone listens to WIIFM: "What's In It For Me" radio. If they're not hearing the right message, they can become defensive and unwilling to cooperate. Problems don't become opportunities to move a project forward, they become opportunities for shifting the blame. When people are focused on protecting themselves, they can't be proactive. They're running the project through the rear-view mirror. Blind.

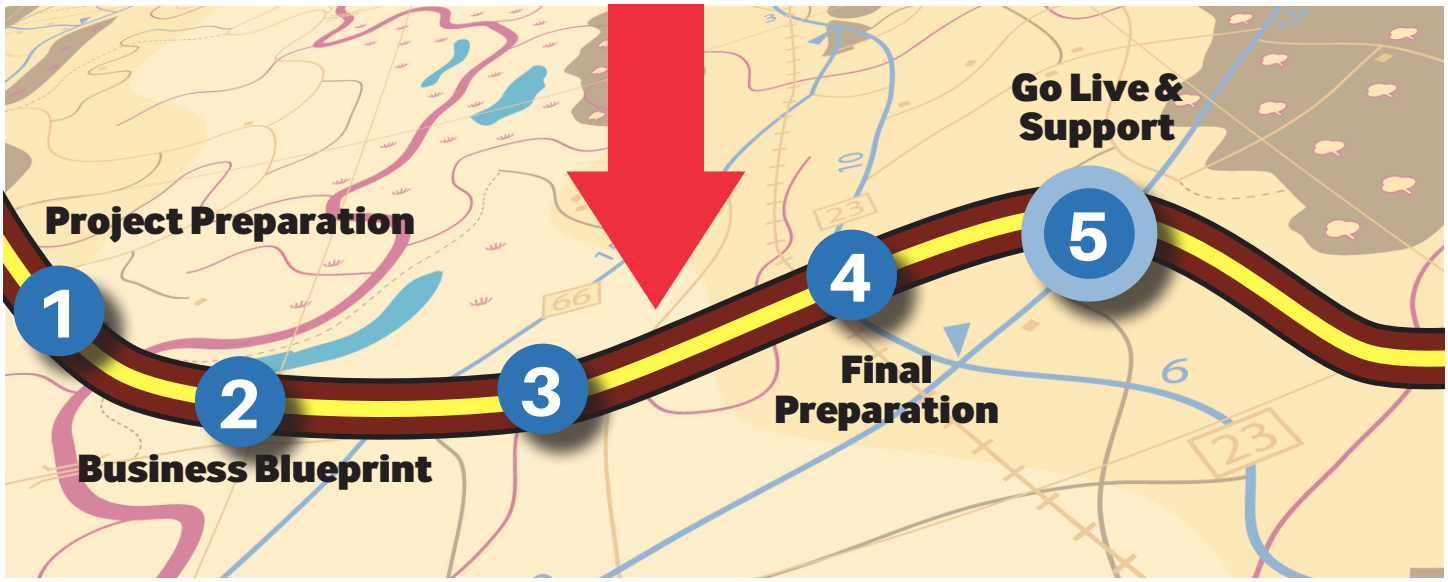


This "blindness" creates all kinds of problems. People work on tasks in the wrong sequence. Projects don't deliver as expected. They take longer and cost more. Frequently, managers conclude that the cause for under-performing is bad planning.

So an effort is made to improve planning. The team strives to make better, more detailed plans, and the cycle starts over again.

This eBook is about breaking the cycle, distilling a complicated project or workflow down to its essence so teams can easily identify the critical issues that slow projects down. Eliminate finger pointing and bring the team together to collaborate. Clearly communicate your project's status and risk. Avoid unpleasant surprises. Get out in front of your projects, proactively managing them. They will be done faster with less effort. You will deliver more.

It will show you the starting point. How to take a complex project or workflow and break it down into manageable elements, organize your workflow, and set the foundation for effective communication and collaboration during execution.



Collaboration calls for clarity

To create a mutual awareness and alignment of action, make what is meaningful *visible*. Increasing visibility within a team highlights critical information in ways that simply can't be ignored.

Create a visual path of the process and show where the team is compared to where they are supposed to be.

Presenting information visually is the shortest route from understanding to action. Brain research shows we process language and text sequentially, but we decipher visual information simultaneously. A clear visual also prevents information overload; people process visuals 60,000 times faster than text. Having a visual aid reduces the time needed to understand information, promoting a rapid understanding of any situation.

A visual representation of the project removes the largest obstacle to collaboration; agreement on the situation. The VPB is your map. Having a visual exposes and presents process problems. Think of the visualization as a shortcut – a project management hack.

A project or portfolio board makes your process visual. Almost everyone has seen or used these visual boards. They use them because they are effective. If they're effective, why not use them all the time?

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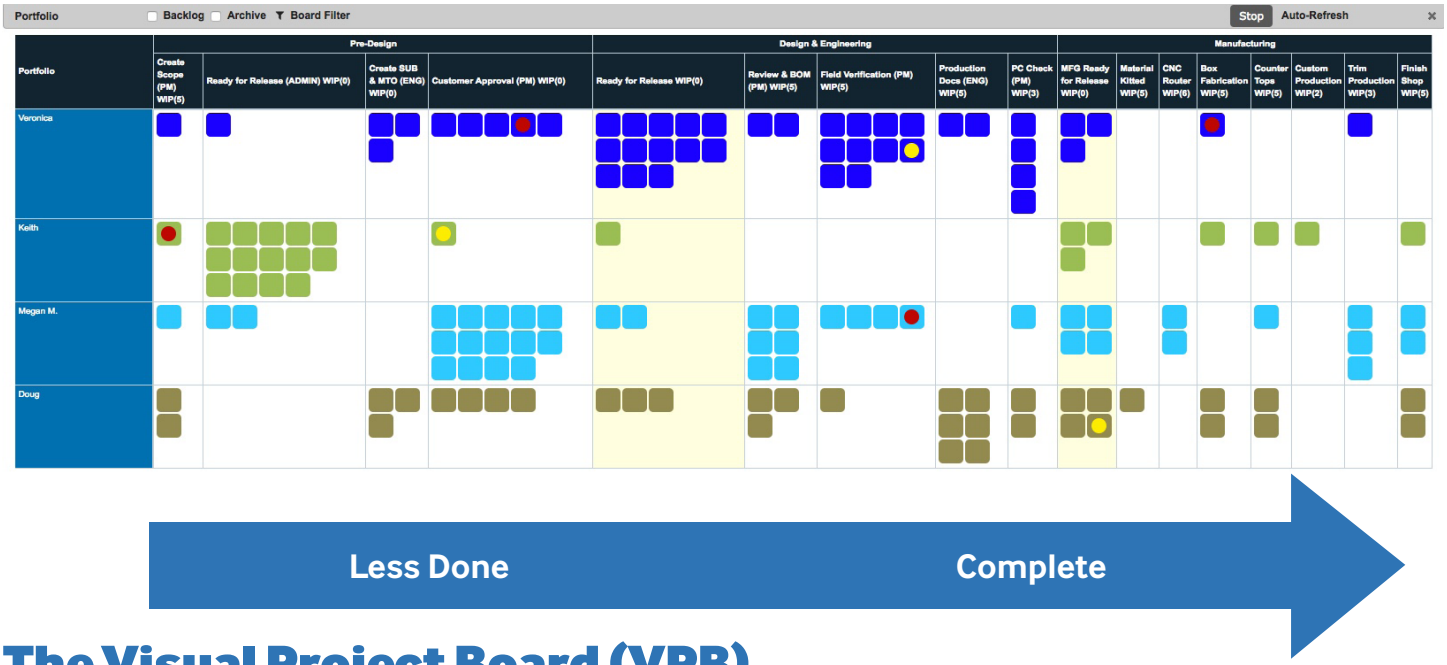
Taming project complexity



The Visual Project Board (VPB)

A **Visual Project Board (VPB)** or the Visual Portfolio Board (if you've multiple projects) makes it easy to see where you are and where you're going. It satisfies the basic needs for collaboration. The board provides quick feedback that everyone can see and understand. If there's a bottleneck or a gap, team members don't waste time arguing about it because it's obvious. They know where the problem areas are. Rather than working toward a foggy goal, members of the team can pinpoint problem areas and take corrective action to move projects closer to completion.

VPBs aren't the only ways to present visual information; football teams use Xs and Os, and we read traffic maps with colored routes all the time. Present your plan and progress visually–so people can quickly communicate and grasp the situation. A picture eliminates the debate about where things really are, so you and your team can move into action. You'll spend less time in meetings, more time advancing your project.

Some of the boards we've built are for advertising campaigns, construction, engineering, software development, even production like manufacturing. It's adaptable to almost any process.

Properly designed, your board will show your team not only where they are, but also where they're going. People can stop talking about what *has* happened and start discussing what *will* happen. They can *see* the problems ahead. Your team engagement will rise, they'll be making a real difference, and they'll be *preventing* problems. Imagine that!

A VPB simplifies managing your project

When you employ the visual board in your delivery process, the task of managing your projects and portfolio is simplified. You'll get much more done with far less effort.

It reduces the time spent in meetings. It builds engagement with your team. And it helps you communicate faster. Your team will have quicker response times because they will be sharper and more focused, with less distortion and rework. As a result, your projects will go faster, and you'll get more done.

A VPB improves communication with more transparency

There's no status reporting, which eliminates a big chunk of time spent in meetings. Rather than pointing to *whom*, the board points to *what*. No excuses or accusations—the board is not pointing the finger of blame. It creates transparency in your plan and makes it crystal clear what needs to be done. It's not threatening, so people don't get defensive. They're not worrying about protecting themselves, so they can focus on the work.

The VPB distills information and gives you clarity on where the critical issues are. It distills time, so you're not spending it sorting and picking through the haystack to find the critical needle. If there's a bottleneck or a gap on the board, team members aren't wasting time arguing because it's obvious where the problem is. Obstacles stand out and they'll see at once where they are.

A VPB promotes a team effort

The VPB answers the question: "What do we do now?"

The board doesn't *create* a team effort, but it *promotes* one. So, if you are a collaborative team or even if you're not a collaborative team, the board becomes a rallying point. It helps clarify accountability. Everyone knows what they, and other team members, must do and that the team is depending on them to do it.

A VPB promotes action

It's also a behavior reinforcement tool.

One thing I hear from users is how they like to use the board to reinforce positive behavior. *Hey, you pulled a rabbit out of the hat for that. That was a great job. Thanks so much for doing that.*

Every project has its problems. Things happen. The board stops the blame game, helping you build cohesiveness among your team. You can escalate problems to the people able to solve them. What the VPB does is give you a way to show, objectively, that *this* particular problem needs to be escalated to a higher level of management or to another department.

But a VPB is not...

The VPB is a tool to support communication, collaboration, and action. It's not a replacement for planning. It's a summary of your plan, not the detailed plan. It's not a replacement for thinking ahead and it's not the solution to all of your project problems.

The board is the *foundation* of your project delivery process. Your starting point.

The VPB is the heart of the ViewPoint Visual Project Management Process.

Howard Slobodin, of the Trinity River Authority, said the ViewPoint system and the visual boards increased awareness in the organization and cut his meeting times down from an hour and a half, to a half an hour per week (you can read the full story here).

When asked how he would sum up the changes ViewPoint had brought to his organization, he paused thoughtfully before saying, "It's been a tremendous gift of efficiency."

"It is by far the best thing I've encountered in my seven years here in terms of being able to track, not only individual parts within a project, but also those at the macro scale."

Trust me on this. ViewPoint with VISUM collaboration software will transform your delivery process.

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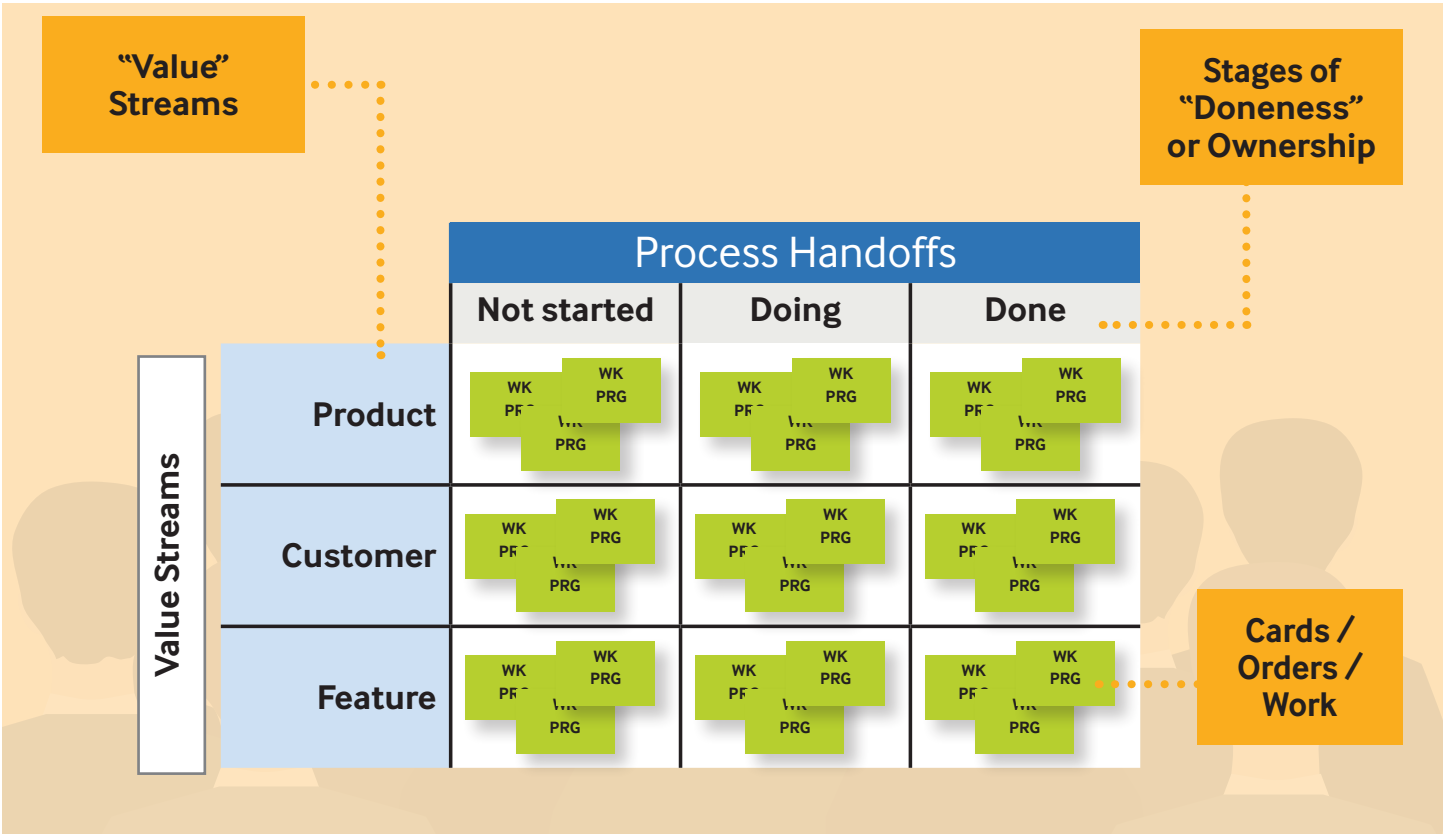
How to create a VPB



Your board will fit your environment, depending on what you're managing. The largest VPB I've worked on managed 500 projects for 450 engineers and procurement. The smallest? A work group of seven people.

If you're responsible for the overall delivery process, it's likely that you'll be managing a portfolio of projects or customers. If you're leading a work group, it may be a skill or person. No two boards are alike.

The objective of the board is to show the delivery process and all the work in it. It shows you: *the work we have in the queue, the work we're doing, and (maybe) the work we've finished.*

The basic elements of the board are columns, rows, and cards. The columns are the stages of doneness.

Columns represent the varying stages of doneness or ownership of the work in your project or process.

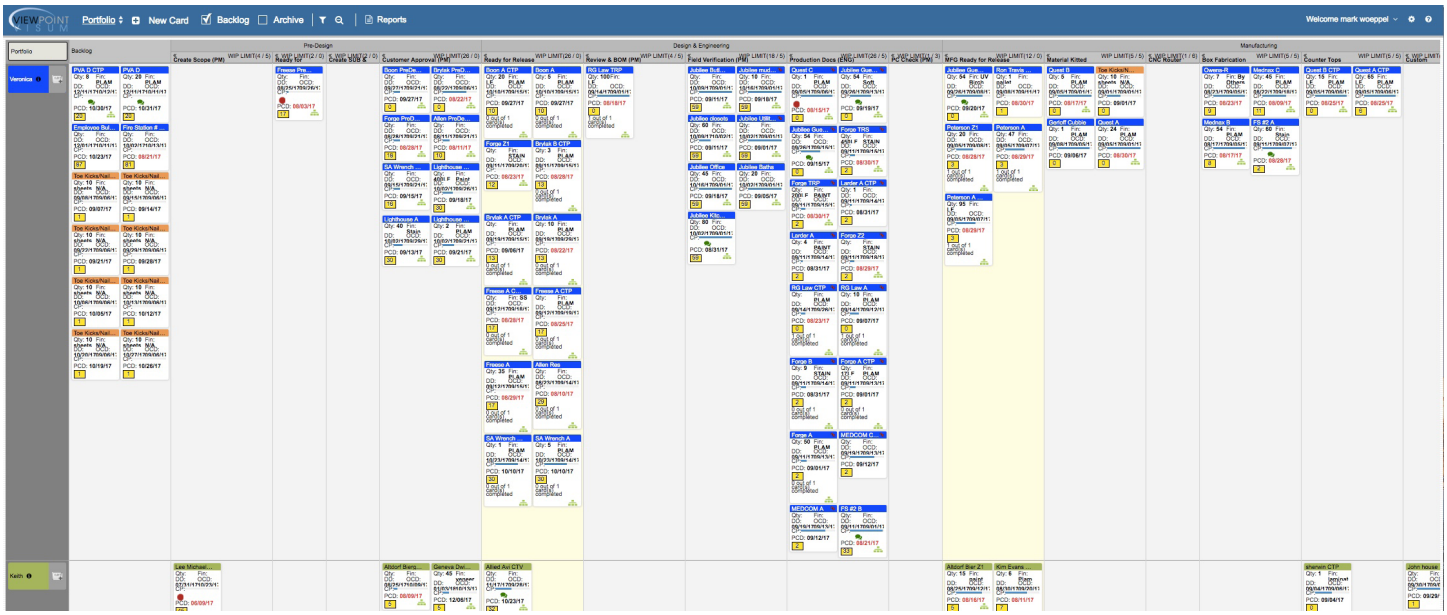
Process Handoffs		
Not started	Doing	Done

Then you have value categories, which form the rows. They can be products, product types, customers, managers, features, or any other way you wish to categorize the work.

Value Streams			
Product			
Customer			
Feature			

And then you have the work, represented by cards or Post-it notes. Each card is an element of work, like a "package" that moves through your process. These can be work orders, features, stories, components, or whatever representation of a work unit you manage.

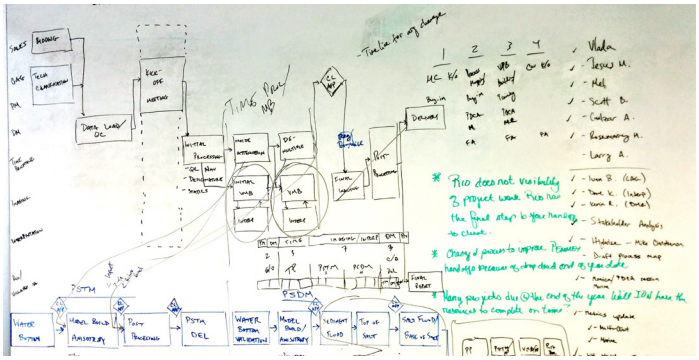
	Not started	Doing	Done
Product	WK PRG	WK PRG	WK PRG
Customer	WK PRG	WK PRG	WK PRG
Feature	WK PRG	WK PRG	WK PRG



Developing a VPB

The first step is to create a map of your process or project. The process map defines the tasks, predecessors and successors, deliverables, and accountability under management. **Before you build a board, you must invest time doing this.** This is your input to your simplification process.

There are plenty of books on how to do process mapping, so I'm not going to explain all the detail of how to do it. However, there are some critical items you need to identify. They all start with a hand drawn map.



Look for changes in project or product state, transformation stages, process steps, stage gates, handovers, changes in accountability, gating processes, and decision points.

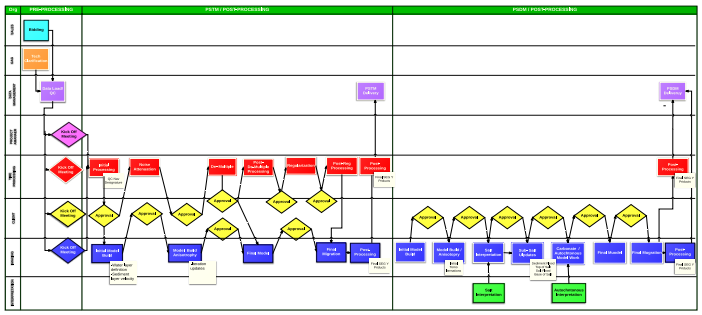
Also look for similarities between projects. You're working towards distilling your project delivery process to its essence, so it represents the most important management points of your project.

The "management points" are critical. Think about/identify those steps that need intervention or approval. These will become columns on your board.

When mapping your process, highlight:

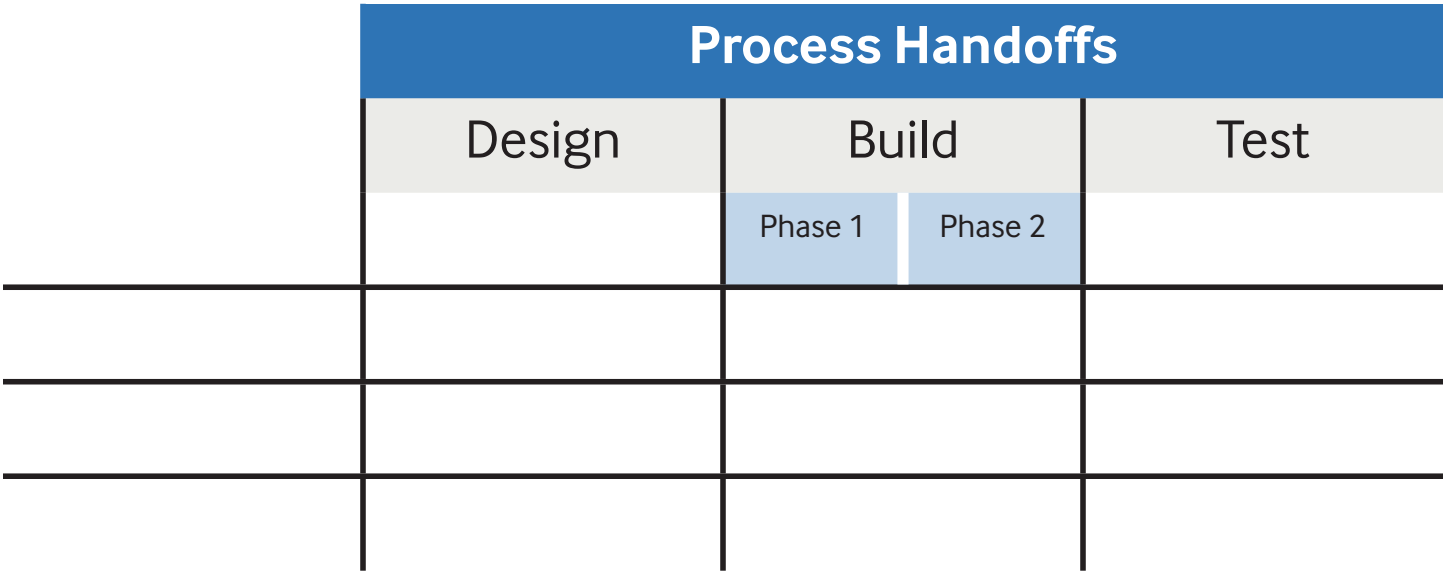
- Changes in project or product state (i.e., groupings, design to production, etc.)
- Process steps; the technical steps your project most go through i.e., survey, dirt work, foundation, etc.
- Handovers / changes in accountability
- Gating processes / decision points
- Similarities between projects / types

Then take your hand drawn version and make it pretty. Yours might end up like the diagram below, with departments or functions in each swim lane, then progress through the columns.



I find that moving from the hand drawn to the formatted version is helpful. It gives me another chance to review the team's work in detail. Additionally, the formatted process map is a powerful tool to engage and teach your team. Often, the process map is posted near the VPB. I've witnessed several teaching moments in front of the map. An organized map will simplify communicating the details of task sequences and who does what, when.

Let's get started.



Defining the columns

The columns are your management points, your handoffs, your major phases. They can be something as simple as this example above.

The columns answer the question: "What are the most important processes that must be managed?" Typically, these are the stages of the process that need or get the *most* attention during execution.

Within each of the columns in the example above, there are sub-columns. In this design we've defined the major phases and two sub-phases of the project workflow.

Start with headings that are descriptive, but high level. Don't reproduce your entire workflow or your project routing. If you feel you must get detailed, do so around what you consider to be the constraining or the critical processes. You can always add more columns later, but at the start, keep it simple.

Consider not just the stages, but also a transition of ownership or accountability. Different departments. Appraise is one department led by one manager, Select is another, Define is another, and Ready for Construction is another. When you're designing your columns, often you're dealing with handoffs from one resource group or ownership group to another.

The general rule for columns is this: if it's an activity, then it's a column. If it's a decision, then it's not a column. The exception is managing queues. You may want to maintain queues of work, "ready to go". Queue columns show the earlier work is done. It's ready or waiting for the next stage.

Ready to Appraise	Appraise	Select	Define/Execute
	App | OK | Ready	App | OK | Ready	Define/Execute | Final OK

If you have a bottleneck resource or a step that requires close management, this is a candidate for its own column. We're following the same principle of making columns your point of management, but we're violating the "summary" rule because the constraint is critical to success of the entire project portfolio.

Don't get complicated (Have I mentioned that?). Start simple and then graduate to more complex model with more columns and more details later. As you use it, your team will figure out what the most important things are. It's important that you start with an imperfect VPB. More about that later.

Columns – the common elements

When we're creating the columns, we're looking for similarity among projects. All projects or products will follow this same path. Consider *all* your work in the design. The board infers "All work follows roughly the same process – the one I've defined in the columns." To clarify "roughly", some projects may follow steps that are not listed, or will skip others. These should be in the minority. If you have two kinds of workflows – and I'll show you this later – you will build two boards.

Building the columns will push you towards building the swim lanes or the rows, which are defined next. The swim lanes or rows – the value streams – are the categorization of activity. You have the various transformation stages, now you will create the categories.

Project X				
Project Y				
Project Z				
Project XX				
Project YY				

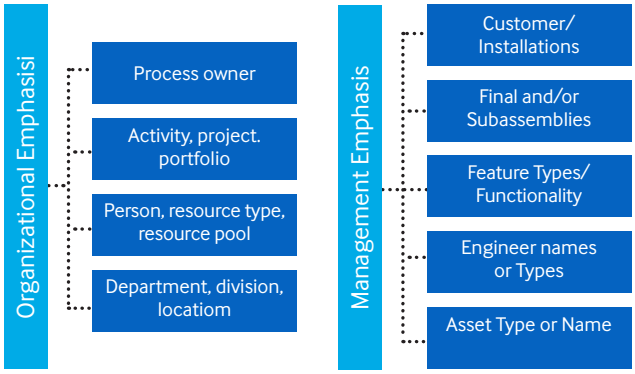
Defining the rows

The rows are the value streams; they show how your product or project matures from an idea to something usable. The lanes are the work streams, often by accountability (functional or leadership), customer, or product/project family/type. Categories of work. Sometimes it's work done at or for a location. Sometimes it's done by resources or functions. Sometimes it's a product. Sometimes it's work managed by a person. And sometimes it's by customer or feature type.

There's an implied process ownership to each one of these value streams, although within each task there might be different people responsible for accomplishing the work at various stages.

Types of rows

For defining your rows, there are two approaches: one with organizational emphasis (where there is a process owner) and one with management emphasis.



With an organizational emphasis, categorize workflows around resources, activities, portfolio, or accountability. This could be a person, resource, resource pool, department, division or location.

Another approach to categorization is a management emphasis to focus their attention on a specific area. It could be a customer or installation site. It could be a work process, like final assembly or subassembly. It could represent an important outcome like feature types of functionality. It could be engineering. It could be an engineer or project manager's name.

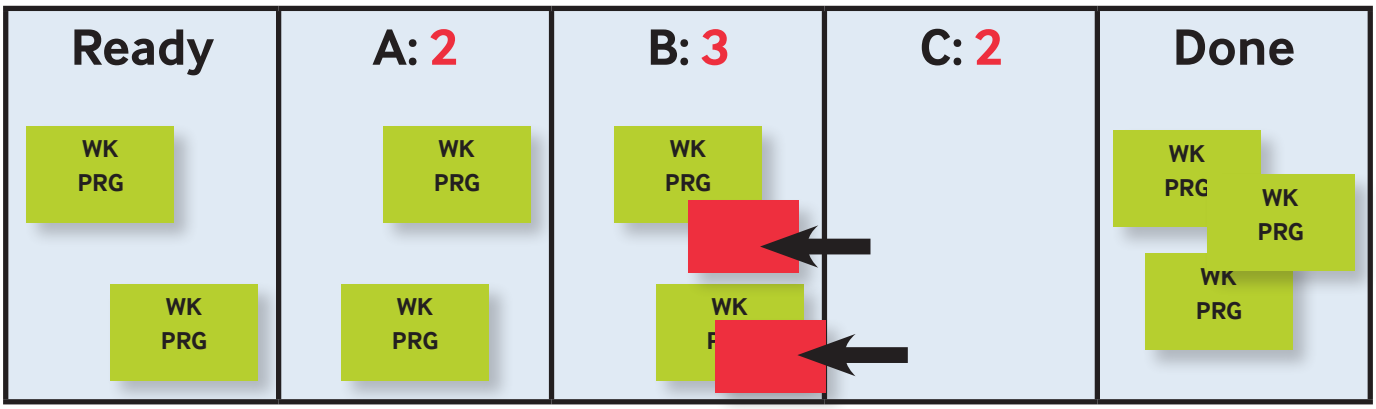
Categories of rows

Designing your row/value stream categories starts very early in the process of understanding the workflow. The main criteria I use is the answer to this: Who owns the value stream or the outcome? Is it a customer or buyer? Is it a project manager? Department head?

Not every work package or task must to go through every step. We've built boards where some products will skip certain steps or some products in a swim lane will have extra steps. You should be flexible and not dogmatic. You want something practical, not a perfect representation of your workflow. You're distilling, not translating.

	Process Handoffs		
Product			
Customer			
Feature			

It's time to populate the board with the work. The cards.



Defining the cards

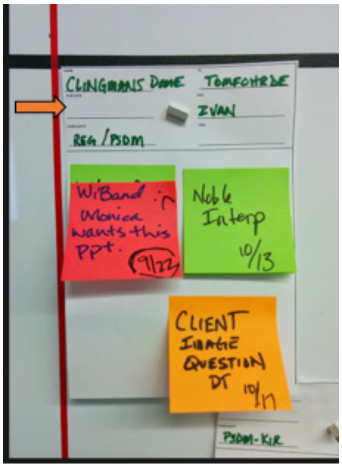
Cards are representations of a unit of work -- packages or work elements. That unit of work can be an order, a project, part of a project, or a feature. The card is unique to your project and workflow.

What is your unit of work? You may break that unit down into sub-units. For example, if you're building a hotel, a unit of work may be pouring concrete. You could break that down to pouring concrete by floor. Sometimes, your unit of work will be both activity and time based. The card would consist of the maximum concrete to be poured in a day. Depending on your management cadence, this time basis could daily, weekly, or monthly.

The main principle in designing the card is to keep it simple. You may add more comprehensive information later, but at the beginning, you want them to be simple and easy to maintain.

What goes on a card?

It has the project's name, the project manager's name, amount of effort (size, type of project, lines of code, etc.), and who owns it. It doesn't have to be fancy, but must be descriptive, which brings us to the size of the task.



This example above has seven items on the card. It has the project name, due date, complexity, and size. In this example, the team needed some differentiation between projects. They wanted to communicate an approximate duration or level of effort for each card.

Notice it says things like "Time Processing – short". It doesn't have the hours, who owns the tasks or who does the task. Just the basic information.

This card doesn't have a date on it but if deadlines are an important part of your process, then you must have it on the card.

Another thing you can add is color. The card in the example has an orange tab on it. If you saw the board, you'd see different colors on various cards. Each color has its own meaning.

Sometimes people will put checklists or list of activities on cards. *To complete this work, we must do these things*. Sometimes acceptance criteria will be listed: *What does done look like?*

Resist adding more information to the cards. More information slows the time to interpret the board and increases the amount of effort to maintain it.

Now, I will show you how to do this by sharing two cases with you.

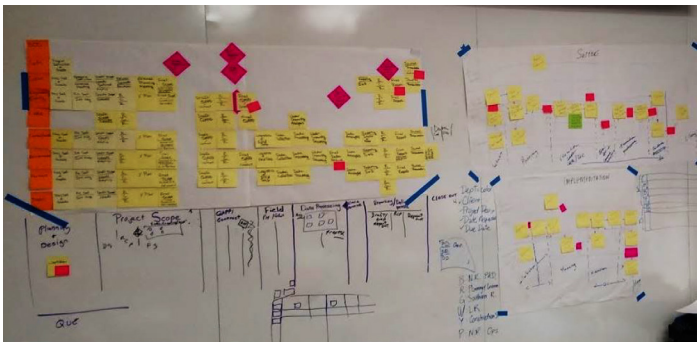
The first case is an organization that does similar projects over and over again. They do data visualization, taking terabytes of data and creating visual representations of underground topography. The second is a one-off project.

Remember, the simplification process is:

1. Map the process or workflow
2. Decide on columns
3. Develop categories / rows
4. Design the cards
5. Populate the board with the work

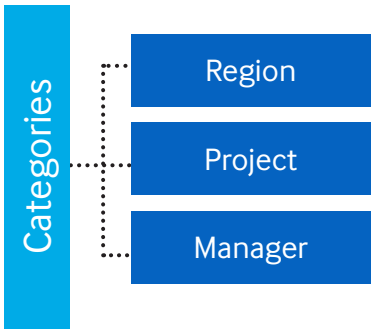
Case study – multiple, similar projects

We'll start off with their process map.

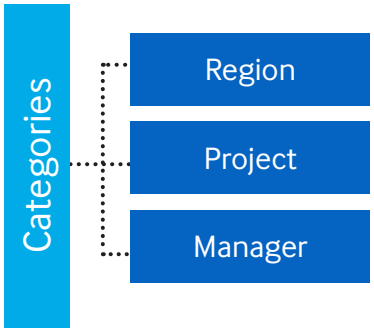


In the example above, you can see by the red Post-it notes on the left, the categories of work for this project are emerging. They named the planning, design, scoping, QA, fieldwork, data processing steps, and they've got Post-it notes that describe the activities, and the inputs and outputs.

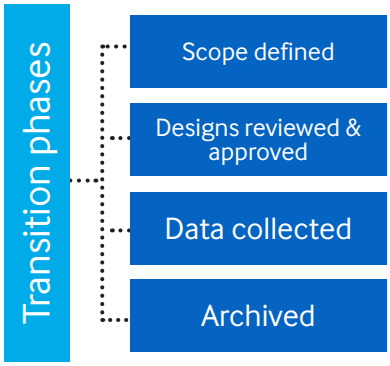
Here, they had the categories of work by geographic region. They had Asia-Pacific, Middle East, Europe, and the Americas. They had projects, and they had managers; the three main categories of work they were managing.



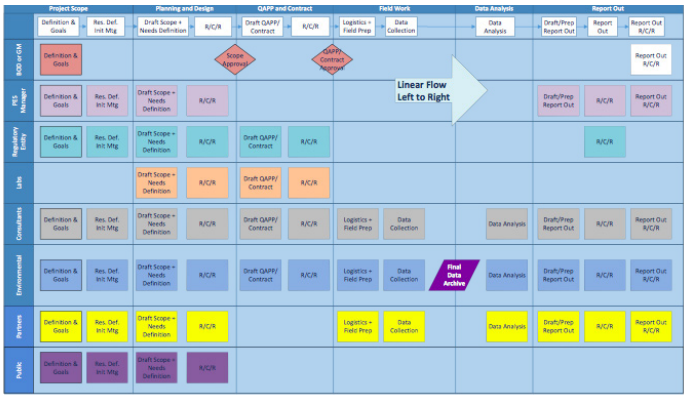
They also had different project types: planning, design, and analysis.



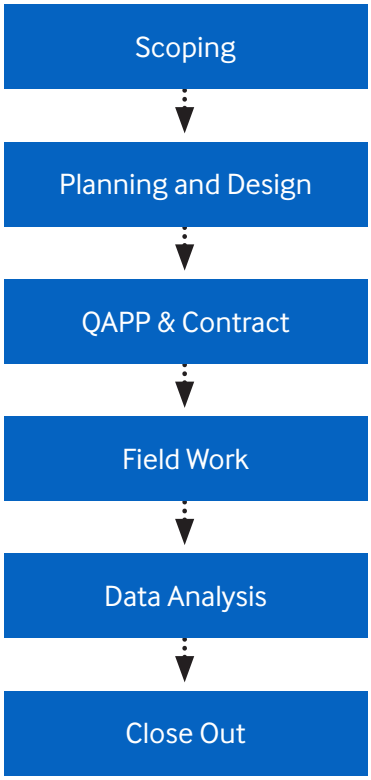
They also had transitional phases that defined the scope. Every customer was unique, every job was unique, so they had to define the project before they could go ahead to deliver the work. After that, they had to get them approved and reviewed, then collect the data, and, when finished, archive it.



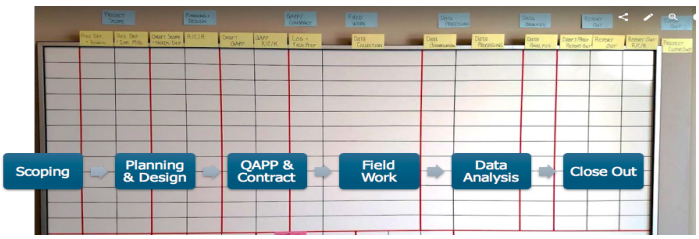
They took this information and made it pretty.



From this effort, they were able to pull out the categories, the types of work, and the transition phases. These became the basic building blocks for their board. Here are the main transition phases.



And then it became a board, with just columns.



Their board maps out the high-level phases of defining the project scope, project planning and design, QA and Contract, Field Work, Data Analysis, and Close Out. These are the blue Post-it notes. They've also highlighted the decision processes with the red lines. Each decision caused a change in state; then another decision, which caused another change in state.

Then they categorized the transitional stages, carrying over from their original hand-drawn process map. You can see those across the top of the process map and the board. These are the yellow Post-it notes. This is typical. You'll start with one idea, which is your hand-drawn process map, Post-it notes, and lines and a bunch of paper, and your idea of how the board will look changes each step of the way. At each development step, you're learning more about your process.

You will make your first draft of the board, distilled from your process map. Sometimes, you'll distill it down and expand it back when you build your board. You'll verbalize which areas are most important to manage. You can see how they did this in planning and design, draft, scope, and RCR, and project scope.

They organized the swim lanes by the project manager and then subdivided by project.

On the left-hand side, there are cards of different colors. Orange, green, blue and red. Each project manager is a different color, and each project is a different swim lane. And the projects are linked to the customer or region.

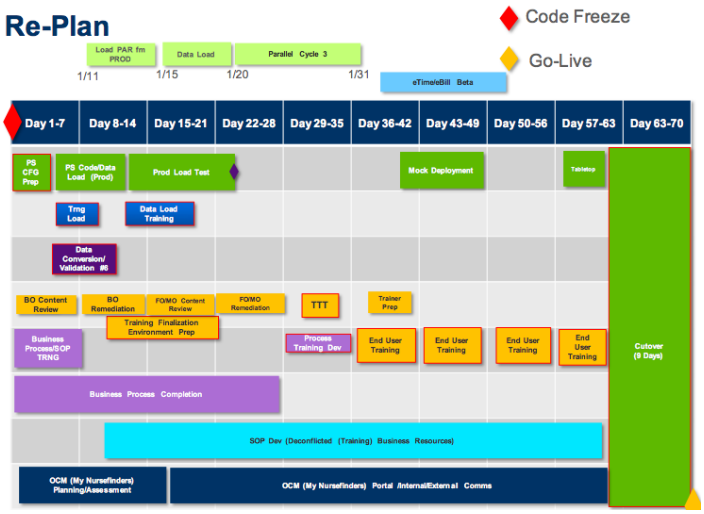
The evolution of the board happens in every implementation. You'll see that in the next case as well.

Case study – one project

In this case, we followed the same process, but we didn't have the advantage of established management points or an established work flow to use as a starting point. It's an enterprise software implementation; a project they will only do once.

They were replacing their information system. There was a lot of configuration on screens and terms, reproducing some functionality, integrating with legacy applications. Even though there was some software development, it wasn't a full-blown product development project. This effort was about adaptation.

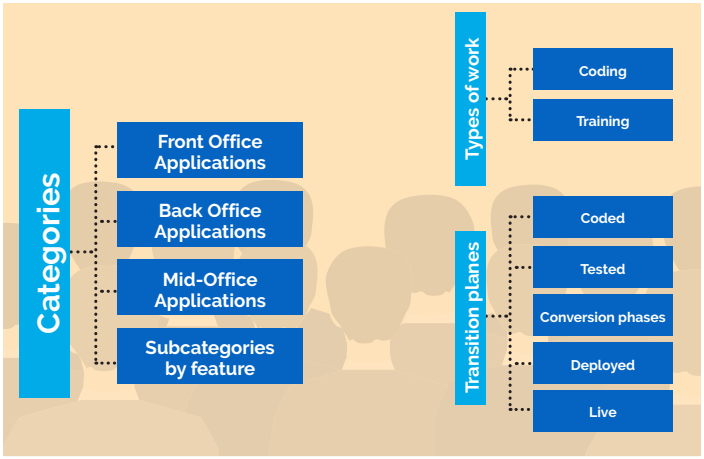
At the beginning, we had a bit of raw material.



This is what they were using to manage their software implementation. There are different activities and the dates across the top.

The problem with this chart was that the task dependencies and accountabilities are unclear. It only tells us what to do. *We will do data conversion, validation, and we will do back office remediation, and we're going to the front office, middle office content review, and then front office, middle office remediation*. It has a rough sequence of what needs to get done but it's not well-connected. There aren't names on it. It says, "This is the direction."

It wasn't completely useless. We were able to extract some basic elements: the categories of work and work packages. It's got front office applications, back office applications, mid-office applications and then subcategories. We have the types of work and some transitional phases, two different kinds of work: coding and training. Then, transition phases which were coded, then tested. We could see the conversion phases (phase 1, 2, 3, 4), which transitioned to deploy, and go live. We got a rough idea of the phases they wanted to manage.



These were the basic elements we started with. We had to make sense of that PowerPoint presentation, starting with a rough categorization of the work. We then built the connections between the different task elements and categories.

We identified the major phases of work: code freeze, data in a training environment, load test, data conversion load, and cutover processes. We have the different resource groups for which these are needed: data group, coding group, infrastructure, and training. What was missing were the connections and the sequences.

At first, we were brainstorming, building the task connections, and hand offs. In our design phase, you can see all the Post-it notes.

The different colors highlight different aspects of the project. Blue colors are business process activities that involved the user and training communities. Red ones, connote IT activities.

You can also see we've drawn arrows. *This item comes before this. This item is needed for this.* After we put it up on a public wall, people wrote comments like "in this "there's partial data" or "partial load."

This brainstorming and development was done in the open; in a hallway in one of the work areas. Putting the draft up in a public place was useful to learning and team buy in. Adding these comments was spontaneous (as we hoped), sometimes, we brought people in to contribute. In the week or so of this effort, there were many spontaneous discussions about its meaning and accuracy.

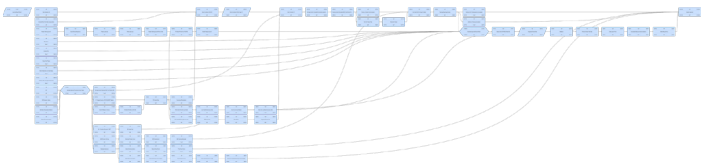
Having the work out in the open (rather than a conference room) increased the engagement of team members in the design process and the project itself. It helped them understand their work, what they needed to do, and they identified risks and bought into the process. We started seeing benefits even before we created the board.

They'd say something like, *"Holy cow, we've got to do this and this. Where is it?"*

And, *"Oh, here's a risk. End to End scenario testing – who will do that? Oh, here's another thing. We got to get those workarounds approved. What about QA data test? Do we have or want this ability introduced into the decision-making process?"*

Whenever you're changing or working towards improvement, it's critical to get buy in from the team. And if they're contributing, it's no longer *your* initiative. It's theirs. Put your draft out in the open. Let people see it. Let them contribute.

After we received the comments and revisions, we put it in the software, organizing the presentation of the information. We came up with a network PERT diagram that showed the tasks and the relationships.

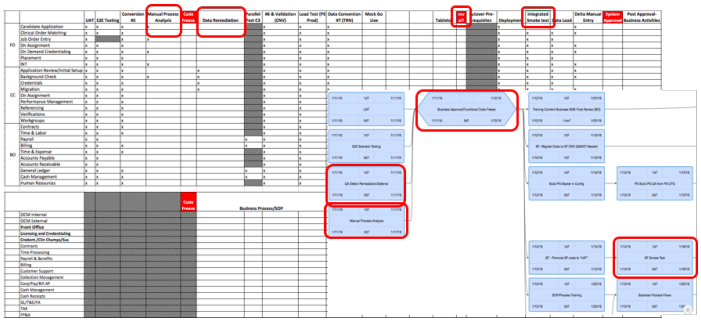


As a result, we realized there were about eight things that could be done immediately.

We had to figure out how to present that information visually.

Because of our analysis work, we also saw different stages of the project, such as the transition from testing to release. We were able take the intuition we gained in building the project networks and see where the decision points, business approvals, and functional code freezes were.

We took that network, and began to develop a prototype of the board in a spreadsheet.



In the image above, notice the red blocks. These are code freezes. Defined decision gates. And then on the left, we had the customers affected: front office, credentialing, and back office. These became categories of work.

We started with the following process steps: the manual process analysis, the QA defects and remediation, the business approval, and the integrated stress test.

Note all these different columns in the mockup. This was just a starting point.

We played with it a bit, put the columns we thought were most important, put it up on the wall, and brought the team together. We showed it to them, and then we said, "Well, this is what we think. What do you think?"

Some said, "Oh, this is great" and others said, "Yes, but this part is not that important. We need this other thing, which is much more important than that. So, let's use that."

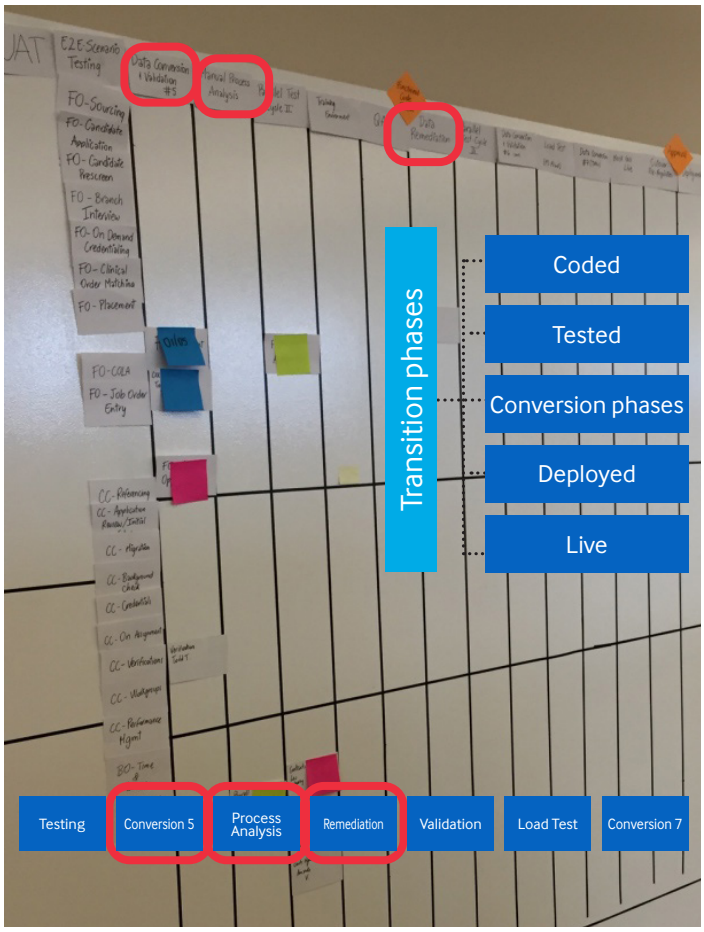
Then we made another version but realized that the work, or the project transformation process, was progressing differently in two different ways. We weren't able to create a single board with a single flow.

That forced us to separate the work into two boards: software implementation and user training.

Here's our first board. In the picture, you can see Luis explaining the board to the team. We don't have much defined in the way of value streams and you can see the draft workflow behind him.

Whenever you're changing or working towards improvement, it's critical to get buy in from the team. And if they're contributing, it's no longer *your* initiative. It's theirs. Put your draft out in the open. Let people see it. Let them contribute.

We identified the transition phases: Coded, Tested, the Conversion Phases, Deployed, and Go Live.



Our process turned into columns. We went from process analysis to remediation and the team added three more columns, parallel testing, cycle 2, the testing environment or the training environment, and then QA. The diamond up there is functional code freeze. That's a decision, not a stage of work, but they wanted to highlight that step.

The swim lanes changed quite a bit from our first drafts. If we look at the mockup, we see that the "front office" is a category of many applications. "Back office" is a grouping of all the PeopleSoft applications. What we ended up with on the board was divided into front office, mid office, and back office applications.

In the final version, they took the front office, and subdivided it into different features. They had front office sourcing, front office candidate application, candidate prescreen, branch interviews, and on demand. Each one of these cards became a subset of front office work.

What we ended up with was a complex plan stripped down into features, which were organized by category, then by feature, and then Subcategories across the transformation process.

Projects In Less Time
Taming project complexity

Your process is simplified, now what?

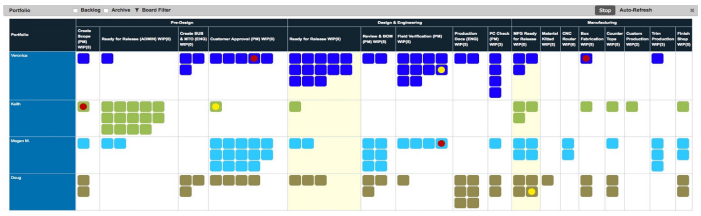
The purpose of simplifying your plan is to:

- Show your team where you are and where you're going (Are we on track?)
- Identify risks (Is there something that may cause us to miss our commitments?)
- See what must be done *now* (What do I need to do today to keep the project(s) moving forward?)

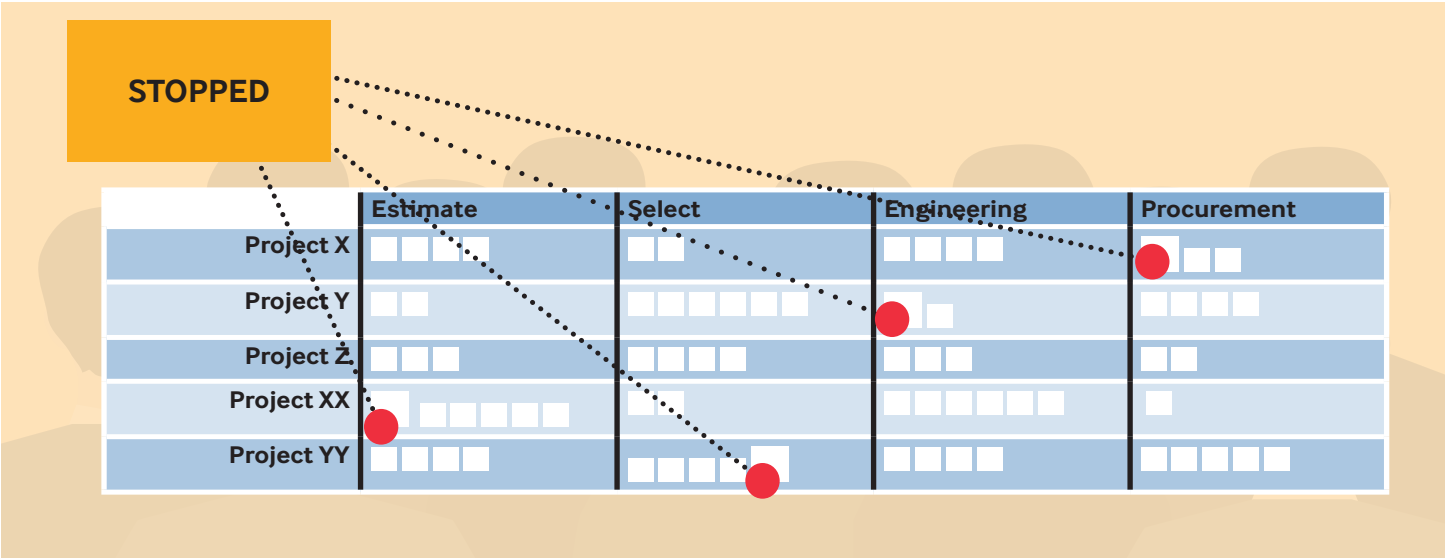
Building the board is the first step. You've overcome the first obstacle. Now what?

You'll have something that looks like this (when you build it in VISM.:

You'll have something that looks like this:



Don't expect an even distribution of cards. There will be gaps and clusters. Some columns and rows will have many cards, some will have few. You have a big picture view of where you are and where you need to go to complete your project (s).



Identifying risks

Those gaps and clusters are your first insight into your process. Gaps suggest an uneven distribution of workflow. Clusters suggest bottlenecks. Either one of these hint at some action you should take. Speed up some work. Break a resource bottleneck. Redistribute work from one area to another.

Your first task is to keep your projects and tasks moving towards completion and the VPB will show you where the work is slowing down or stuck.

The color of the card is not decorative: it instantly flags important information about the project's progress, status, or even type of work. You are free to associate colors and meanings as you wish. Add tags to the cards to indicate action needed.

- **Yellow:** Work is at risk – while it hasn't come to a halt, there's enough reason to suspect it may be delayed.
- **Red:** Urgent – progress has stopped. Immediate action is required.

While it's good to know where the risk is, it's even better to understand what's being done about it. I recommend adding the following four pieces of information to every red and yellow tag:

1. The **date** the problem was first identified.
2. A shorthand comment on the nature of the **problem** (i.e., mechanical error, supply shortage, design change)
3. Name of person **responsible** for resolving problem
4. Estimated **time** to fix it.

Maintenance / updates

The board is a snapshot of where you are today. What about tomorrow or next week? How will you keep it up to date?

How can we get things done when we're spending time on figuring out what has happened rather than what should happen? How to *see* the needle of information in the haystack of data while communicating with our team and stakeholders?

Updating the board in a team meeting is a poor use of time. Updates should take place BEFORE your collaboration meetings.

The main things to consider in developing the maintenance routines are frequency and accountability. The frequency of updates should be related to your rate of task completion. If your task durations are measured in hours or days, consider a daily update.

If the durations are measured in weeks or months, consider a weekly update. Assign someone to update the board. They can be an administrator, taking reports from others or project managers, or functional managers. It doesn't matter who, what does matter is that when the team comes together, they don't spend time reporting completions.

Lessons learned

- Process Mapping is essential
- Start with simple representations; fight complexity
- Involve your team
- It's not about the board, it's about communication

The most important thing to do is develop an understanding of how work moves from one part of the process to another; defining when a card moves from one column to another. When is it ready to move? What does "done" look like?

The process mapping exercise forces those important conversations and decisions. This will result in process improvements even before you get the board up, clarifying roles and accountabilities during execution.

You must fight the urge (and maybe your team!) to make your board complex. People will want to add things. You will walk this line between accepting changes to get buy-in from the team and preventing complexity.

There's no hard and fast rule of how complex or simple your board should be. It should be simple enough to use, not needing too much maintenance effort, but robust enough to communicate the state of your delivery process and the work in it.

You'll know if you've struck the right balance when you can get your most important actions identified and assigned in less than 30 minutes.

When we start using these boards, people often fear the board will cause additional work and say things like, "Oh, my gosh... Now we've got *another* thing that we must do."

There's far less work later, but that is not apparent to your team. At the beginning, your board must be simple and non-threatening. Simple makes it easy to adopt. Too much data overloads your team. Information overload is the enemy of adoption. Your board will evolve anyway as you use it, so save yourself some time and effort by keeping it simple.

Simplifying your plan and building the board is an iterative process. Your team will not salute and follow your first version of the board. That will not happen. They will find fault with it. They will tell you it's wrong. Those are good things! Expect it. Welcome it. It will make your process better.

Present the board as a possibility and let the team contribute to finishing it. That way, it will become their tool. If they're going to use it, they should have a voice in building it. Typically, the board goes through four, maybe five, iterations before it settles into a final, stable version.

Once stabilized, you can use the board as a springboard for other things: managing dates, measuring process performance, and defining resources. Don't do that at the beginning. At the beginning, just focus on building yourself a map. Don't get tangled up in detail. Start with something simple.

When you roll out your VPB, emphasize that it is not the end. The board is just the beginning. The board is a way for you to communicate. It's the tool to get people together and to accomplish the things that need to be done.

The next step: build your collaboration process

So, you've made your board. Your plan is visual. Now, what do you do?

Your next step after the board is to build that collaboration execution process and figure out how to use it to engage the team for action in daily or weekly collaboration sessions – stand up meetings.

Focus your team on issues, not status. This is how you get people to collaborate.

What are you going to talk about? Who will be there? What are the inputs? What are the outputs? How often do you have them? What's the rhythm of your project?

Who plays what role? Who will do what? Who will own the meeting? Who will be the facilitator? What happens when a key stakeholder is not present?

Why build a VPB?

You want to go fast. You want to increase your team's engagement with your project. You want to see where you are and where you're going. Because you want to make your life simpler. The amount of effort to manage a project or portfolio of projects goes down exponentially when you're using a visual board. It helps you communicate faster and better.

"Within the first week of doing the meeting most of the team realized that it was easy effort, it increased communication,, visibility, and they were looking forward to getting these things done"

Frank Ragan, BP

The frequency and the quality of communication is so much better, smoother, easier, with less friction. And you will spend a lot less time in meetings.

"We are not dealing with the silly challenges any more of not knowing how to work together and how to collaborate, but now we are focussing on real business challenges"

Lauren Wilson, Datu Health

Building the VPB shows you where you are, and where your project or portfolio is heading. It shows you which tasks need attention. It allows you to capture the intuition of the team to identify risks early.

You can sort through the ocean of data and identify the critical elements of your project that need action. The VPB presents a view of your portfolio that is useful for the team in taking action and for management to govern the delivery process. Bring the right people in to solve the right problem at the right time.

"We have so many new people coming in all the time, we have so much work going on, it makes it easy to onboard them to see what they are supposed to be doing to progress the project and look right at it

Don Taylor, BP

Remember, a VPB will help you

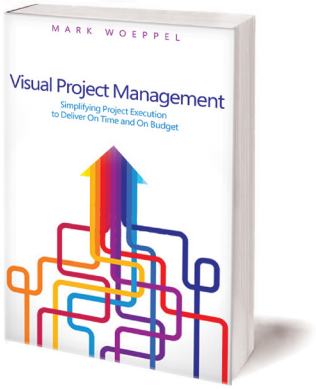
- Simplify managing the project or portfolio
- Communicate faster and better
- Reduce time spent in meetings
- Engage your team

Stop using spreadsheets and email to communicate your project action items. Make your project visual and bring your team into your project delivery process. Treat execution as a discipline. You will get more done, in less time.

Projects In Less Time
Taming project complexity

Eager to learn more?

What is Visual Project Management?



It's not just another book full of the same old advice to improve your project deliveries.

It's NOT about planning better - yet you'll get better on time completion of ALL your projects

It's NOT about putting up a project or Kanban board – yet you'll learn how to leverage the visual presentation of your projects to do more in less time

It's NOT warmed over Agile techniques – but you'll learn how to take those techniques and deliver awesome results

Visual Project Management is A SHORTCUT

Despite investing millions in training and developing more "project management maturity", less than half of all projects are delivered on time and on budget. *Visual Project Management* introduces ViewPoint, the method that addresses the true root causes of late projects. A set of principles and practices that you and your team can employ—no matter what environment you're in—to improve productivity, reduce project durations, improve delivery performance and stay on budget.

- Learn an innovative project execution maturity model to take your team from ad-hoc, reactive management to a fully integrated system to anticipate and respond early to delays and problems.
- How to diagnose, weed out, and solve the root causes of late project delivery just by observation
- How to take control of your troubled project and get it back on track
- How to increase transparency into your project so you can see where the problems truly are while keeping things positive
- How to improve teamwork to act on the most critical items to keep your project on track with fewer meetings
- How to improve clarity and timeliness of communication without more email and reports
- How to boost your project throughput without hiring more people or spending more money
- How to change your delivery process without a big training program

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Questions? Send me an email
mark@projectsinlesstime.com
I'll be happy to help.

About the author

Mark J. Woeppel is focused on improving productivity in production, project management, and knowledge work. The author of three earlier books—*Manufacturer's Guide to Implementing the Theory of Constraints, Projects in Less Time: A Synopsis of Critical Chain, and Visual Project Management*—he has also penned numerous white papers and eBooks and has taught or lectured at several universities, including Northwestern Kellogg School, California Institute of Technology, and the University of Kansas. Married for over thirty five years to the same fantastic woman, he is also the father of three wonderful adult children.

Other eBooks written by Mark:

Why Do Projects Succeed or Fail? Discover What Really Makes a Difference

Visualizing Projects

Remote Control: How to Get Productive Teamwork from Distributed Project Teams

Blindsided! Five Invisible Project Threats Successful Managers Must See

Achieving Top Performance Under the Worst Conditions: 7 Lessons Learned from a Disaster