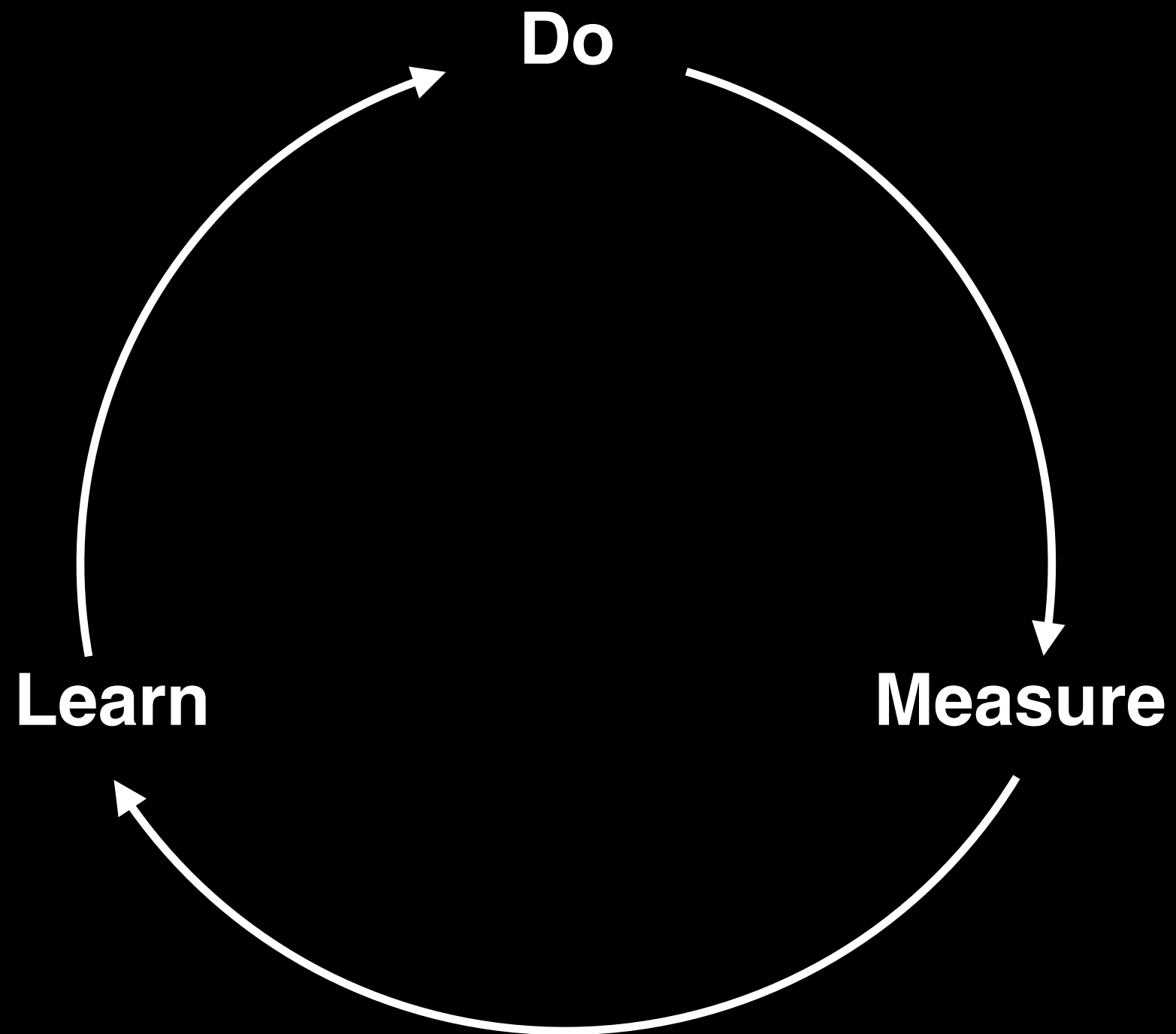


# Sustainable Planning

@krismcd

@mcdickenson

2015.11.18

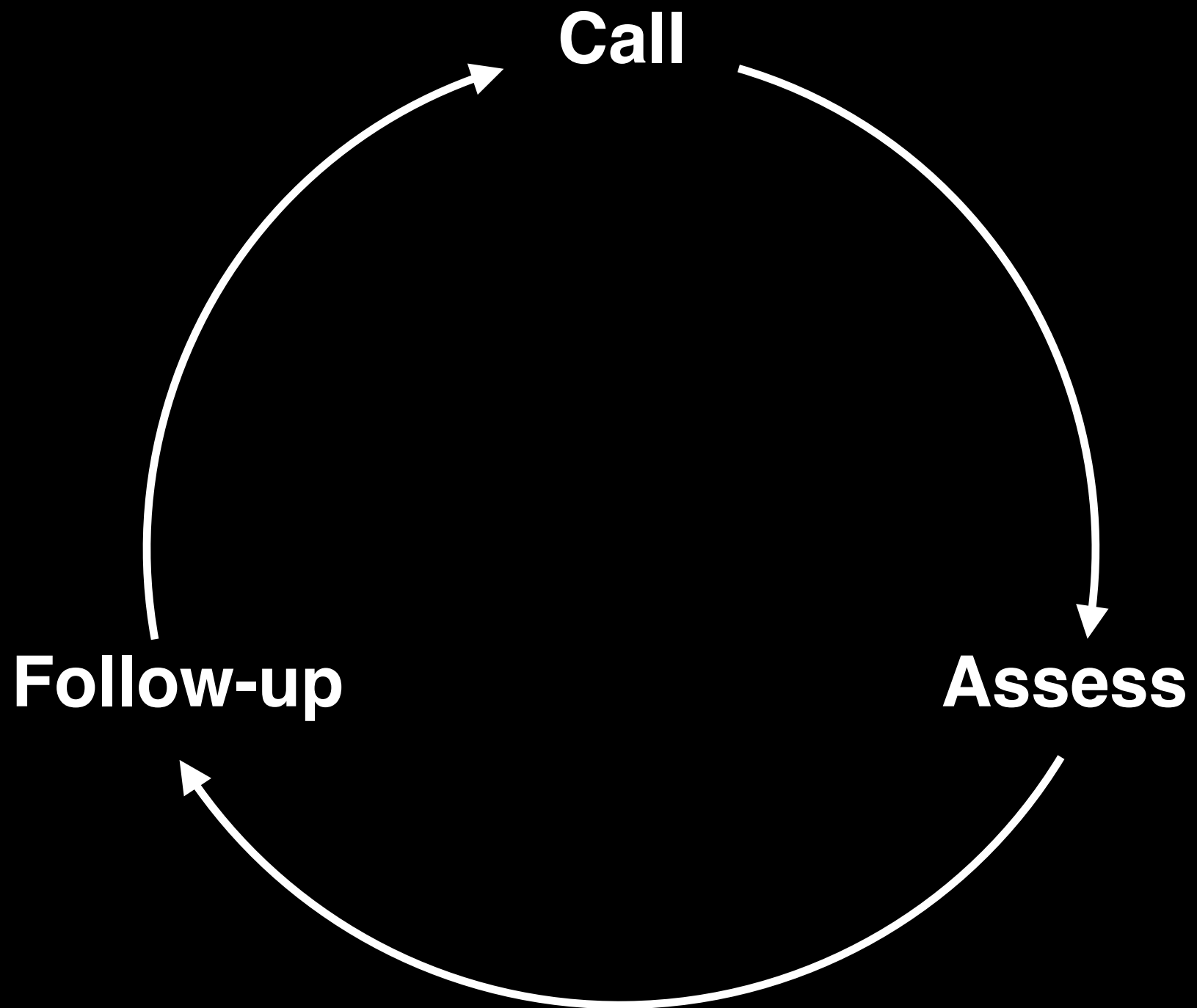


Sales

**Call**

**Follow-up**

**Assess**

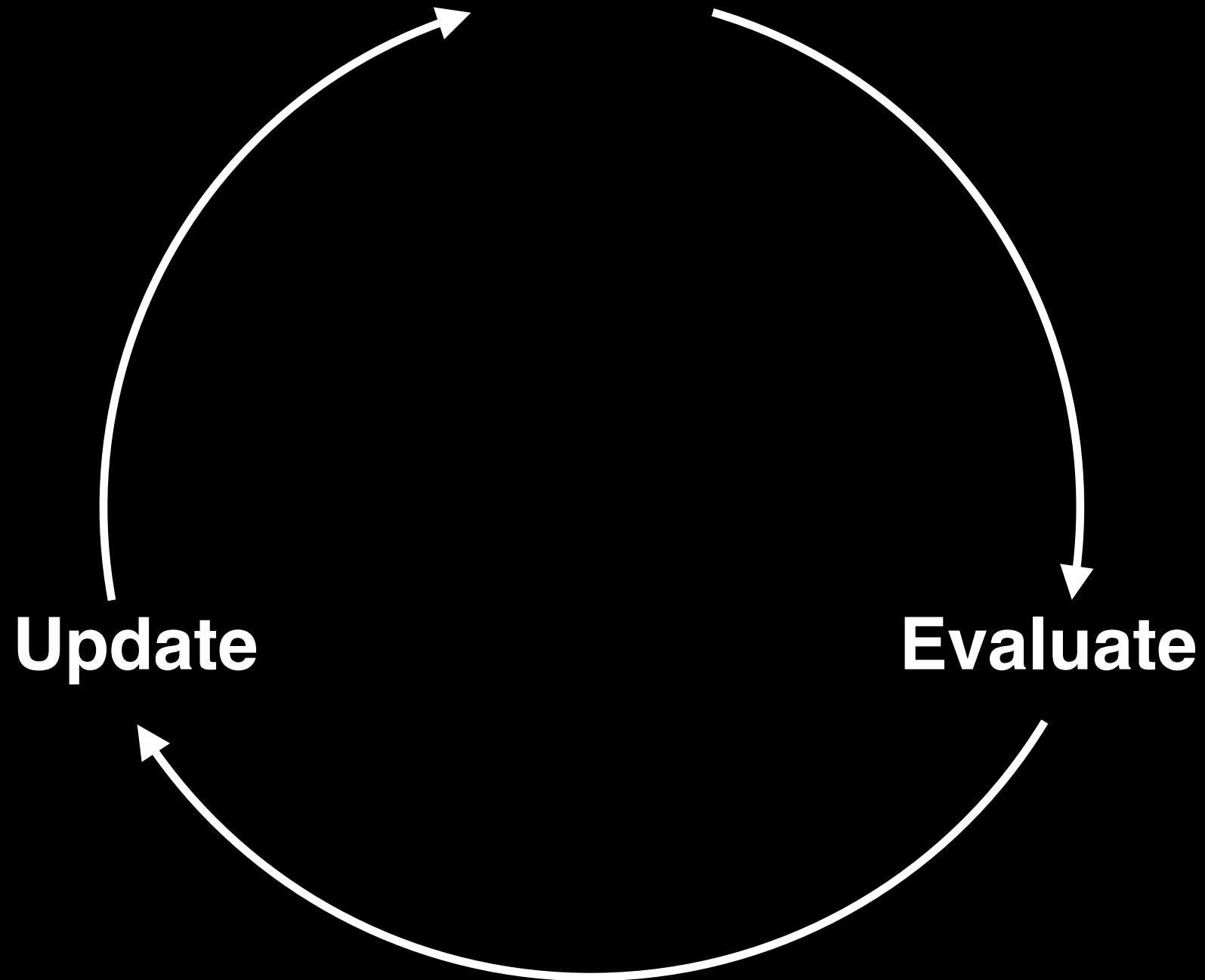


Account Management

**Launch Campaign**

**Update**

**Evaluate**

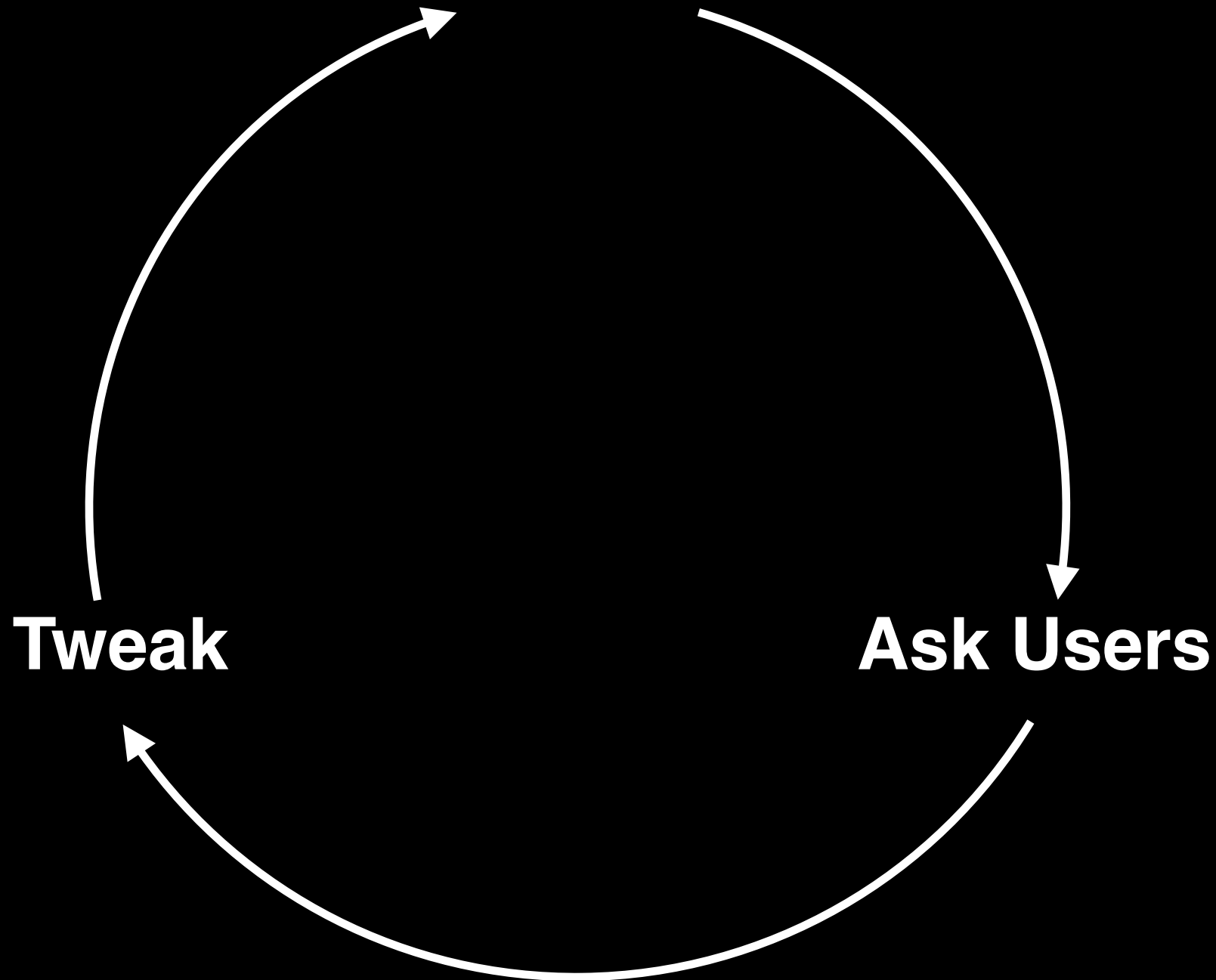


Analytics

**Build Dashboard**

**Tweak**

**Ask Users**



Customer Support

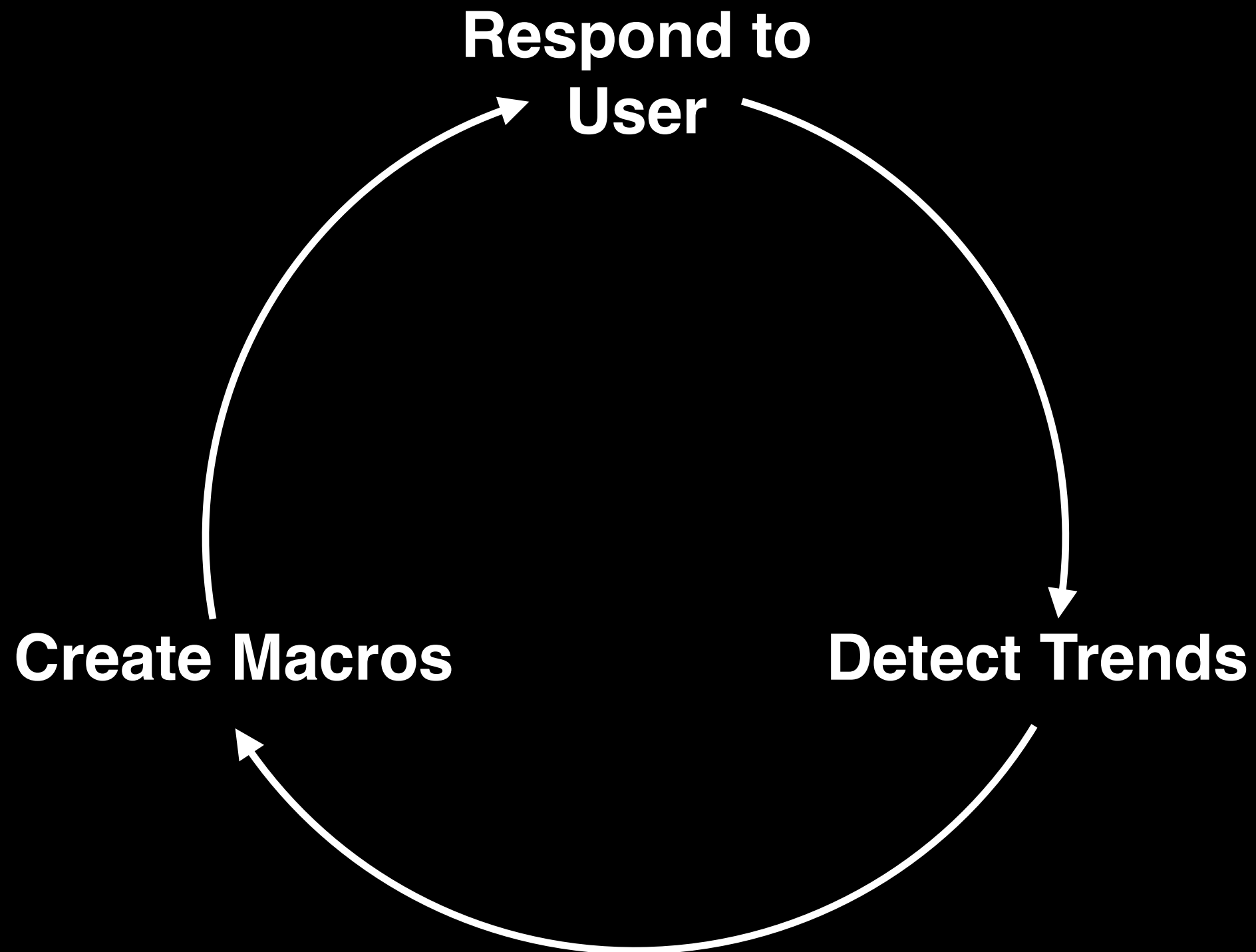








Image: Toyota



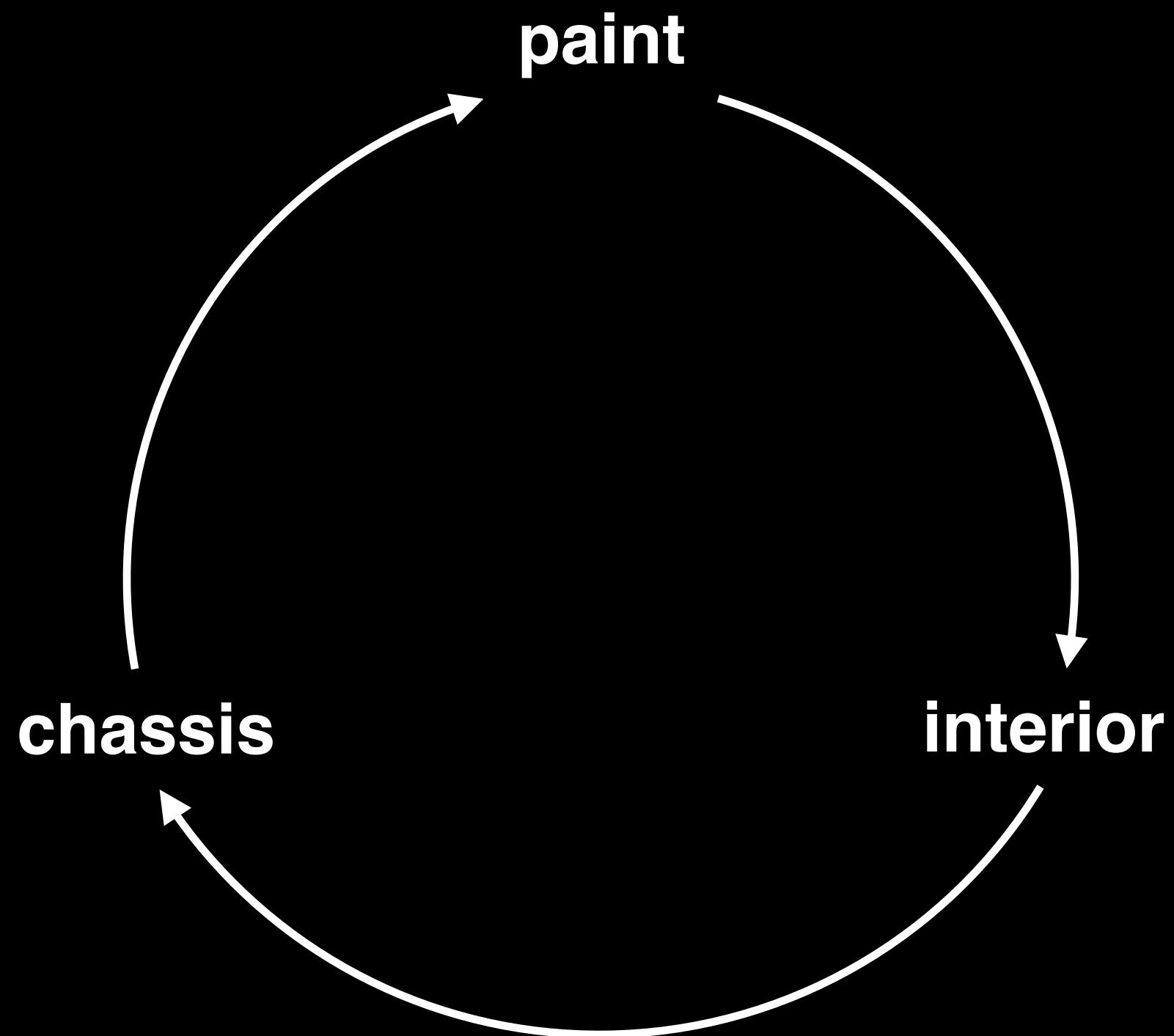
**chassis**



**paint**



**interior**



To Do

Doing

Done

USE  
KANBAN

TRY  
KANBAN  
TOOL

LEARN  
ABOUT  
KANBAN

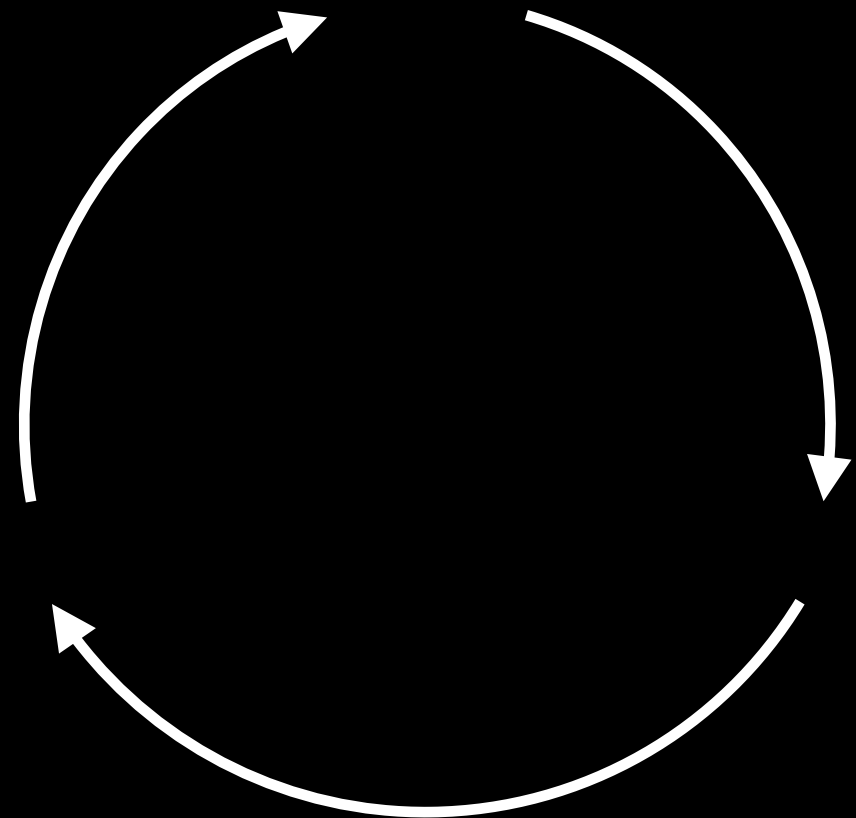
GET SOME  
STICKY  
NOTES!

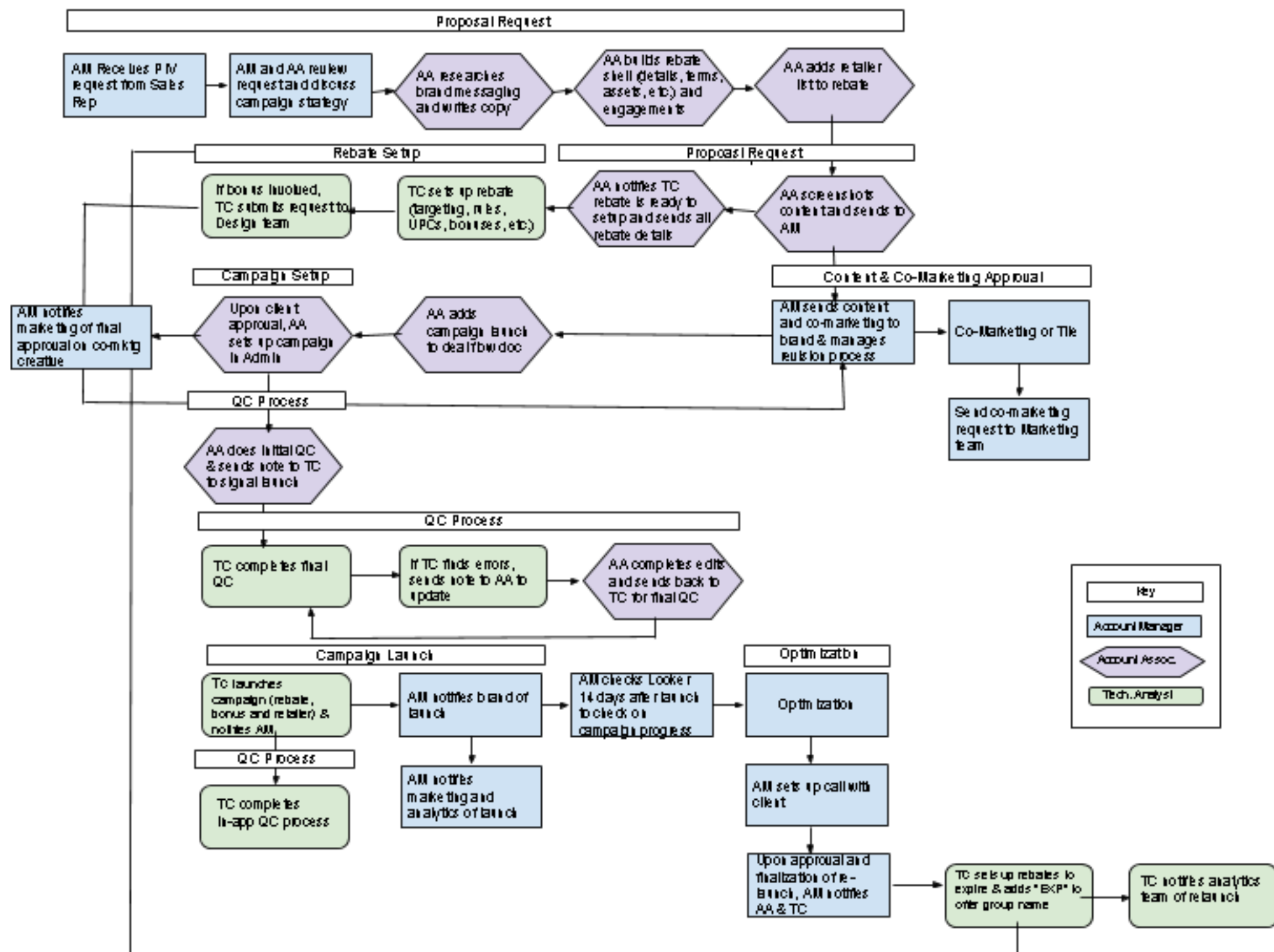
GET A  
WHITE -  
BOARD

questions?

# start with an existing process

- Find repeated cycles or patterns in your existing process(es)
- Identify common issues or bottlenecks





# visibility

- Single reference point
- Reduce communication overhead







## Kitchen Remodeling

## Ideas

install pot rack over island



replace drawer knobs with quirky ones from antique shop

1

Twitter refrigerator integration

new window valence to match cabinet colors

new coat of paint for door frame

Add a card...

## To Do

Adjust water pressure in sink

0/4

remove old refrigerator and stove

Install new sink

1 Jul 23 0/9

install new refrigerator and stove

install new wall shelves

1

install new flooring

Buy paint for cabinets

Add a card...

## Doing

Pick faucet to match new sink

Pick countertop colors



Buy new kitchen cart

1

Add a card...

## Done

Design new kitchen space

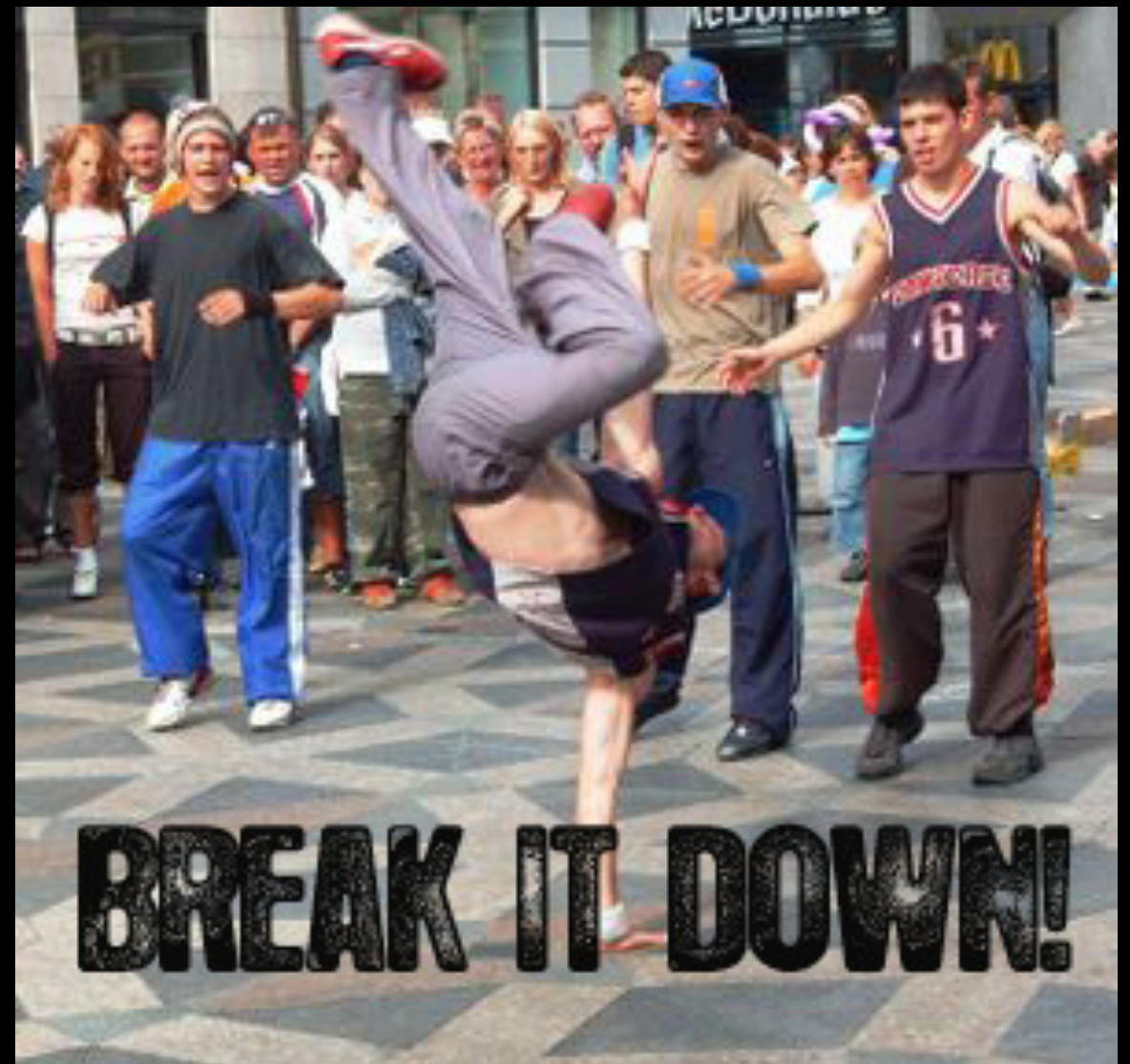
1 vote 2

call contractor

Add a card...

# task break down

- Large tasks are daunting
- Smaller tasks are easy to manage
- Allows for prioritization





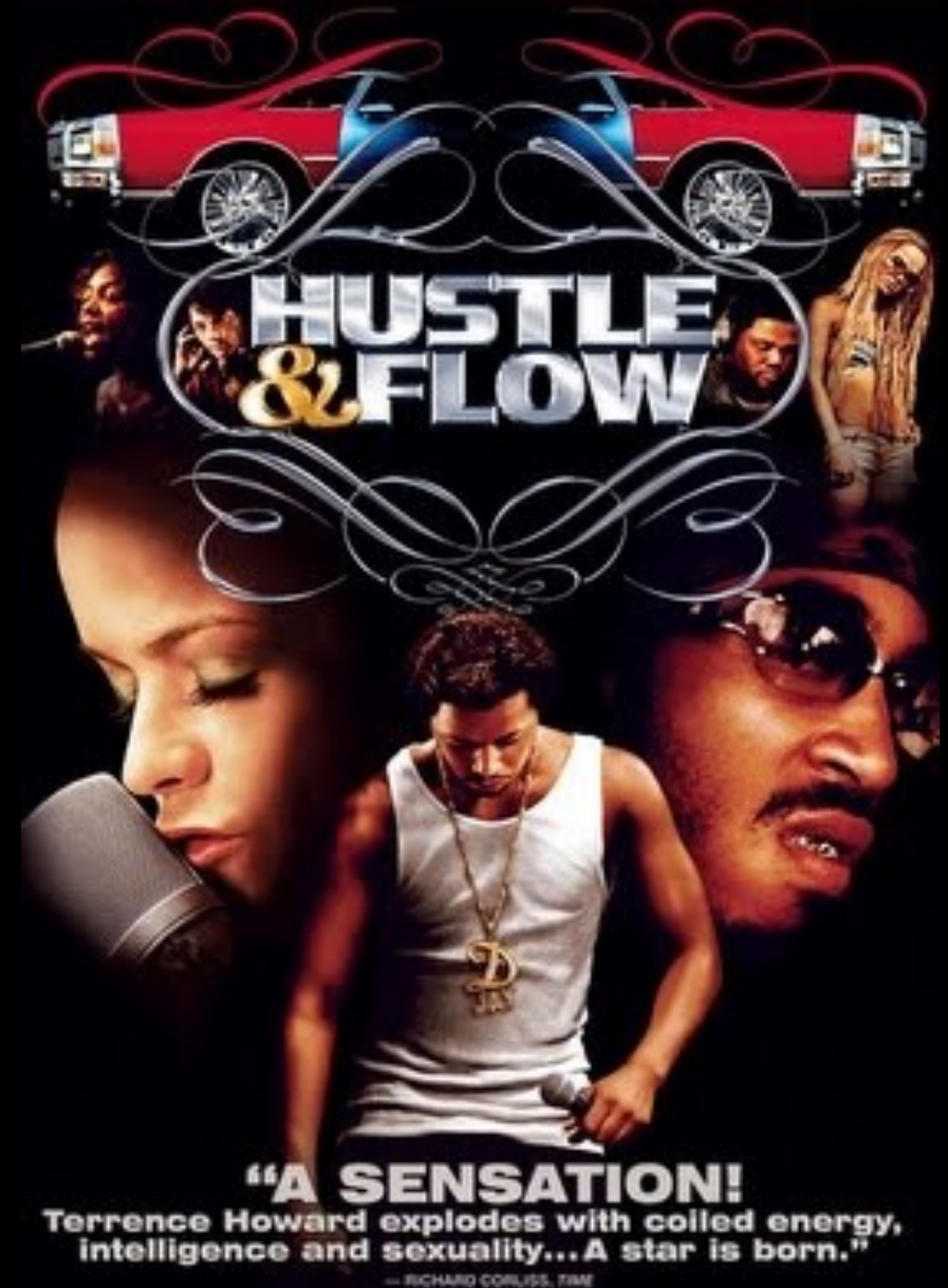
# prioritization

- You can't have 10 priorities
- Urgency + business value
- Work finished > work in progress



# flow

- Identify handoff points
- Pull a task when you have the capacity to complete it
- Establish predictability ('velocity')



# sustainability

- You are 12 - 31% more productive when you're happy.
- Hero mode = hides process problems & hiring needs, leads to burning out

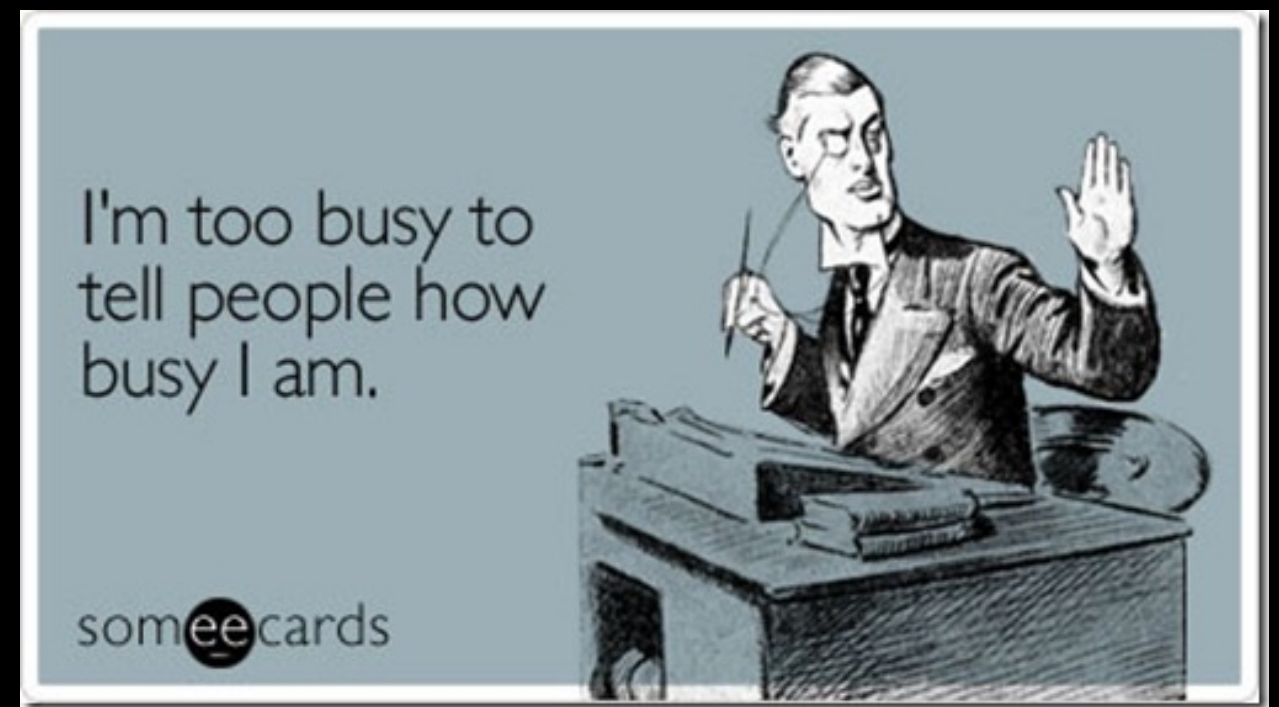


questions?



# why do we plan?

- Make the "do" phase more efficient
- Apply learnings from prior work
- Make sure we're delivering the most possible value at any given moment



# how do we plan?

- Break tasks down
- Should be self-contained and deliver value
- Decide what outcome is acceptable



# when do we plan?

- Regularly and consistently
- Allows for reliable measure of “velocity”
- Additionally as-needed





# who plans?

- Anyone who has a stake in the outcome
- Not a “top-down” process



informed, realistic deadlines

# **informed**, realistic deadlines

- What needs to happen before this work can be started?
- What would this deliverable be worth if we could get this a week earlier?
- What would it cost us if this was finished one week later?

# informed, **realistic** deadlines

- What's the effort required relative to our other upcoming tasks?
- Is this a case of “not enough time” or “too much to do”?
- Which parts of this process cannot be sped up?



# informed, realistic **deadlines**

- If the deadline is fixed, which features are flexible?
- If the requirements are fixed, how flexible is the deadline?
- When complications arise, how will we address them?

# takeaways

- Plan at regular intervals to establish velocity
- Identify when deadlines are unrealistic
- Shift priorities to deliver sustainable value

# questions to consider

- What is your “do” process? What are the repeated cycles?
- What are the “bottlenecks” in your flow?
- Where are resources, time, and effort wasted?
- Where else on your team might these occur?