



White paper: Developing agile project task and team management practices

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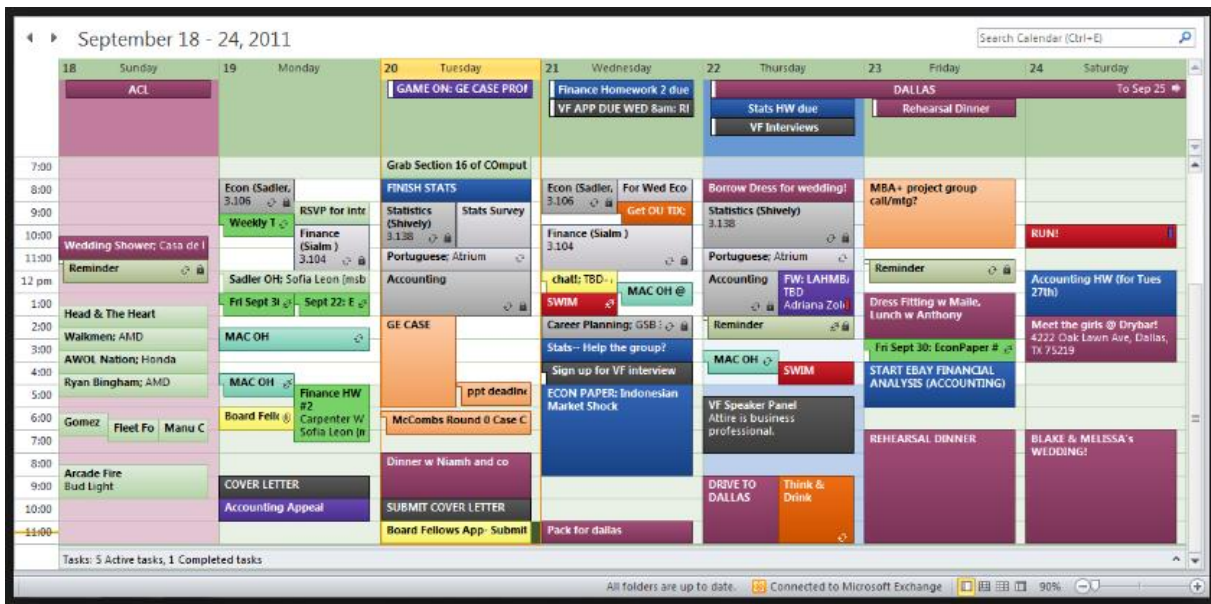
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The case

Every one of us seeks for perfection in daily routines and personal life. As time is the most valuable resource we have, wasting it due to bad planning practices or lack of organizational skills can stop us from achieving the goals we aspire.



Item	Action/Task/Decision	Priority	Driver	Responsible	Due Date	Status	Note/Comment
1.0	Establish high-level program goals, outline, name for leadership seminar	High	Sophie	Eric	2/7/2011	Complete	Validated with client senior management
2.0	Present curriculum outline to client for project management class	High	Sophie	Sam	2/17/2011	Complete	Reviewed and approved by sponsor
3.0	Request information from special events vendor regarding upcoming client seminar	Medium	Sam	Sam	2/17/2011	On Hold	
4.0	Develop curriculum outline - Process Owner overview	Medium	Sam	Sam	2/17/2011	On Hold	May not offer formal PO training as part of pilot
5.0	Book training rooms for all class days, with breakfast and lunch for management skills training	Medium	Sophie	Jessica	2/24/2011	Complete	Confirmed by conference center
6.0	Review communications for pilot process improvement program	Medium	Bill	Bill	2/25/2011	Complete	Reviewed and approved by sponsor
7.0	Send email to VPs to announce pilot PI program	High	Sophie	Bill	3/1/2011	Complete	Sent, no comments returned
8.0	Print pilot PI training materials/workbook for review	Medium	Bill	Jessica	3/1/2011	Cancelled	Print at client site
9.0	Prepare sponsor's presentation to pilot PI group VPs	High	Sophie	Bill	3/2/2011	In progress	
10.0	Identify Senior Directors & Directors to notify regarding pilot PI program	Medium	Sophie	Sophie	3/3/2011	In progress	
11.0	Schedule meetings with Area Directors to discuss leadership seminar	Low	Bill	Jessica	3/3/2011	Cancelled	Falls outside of scope of pilot
12.0	Write email to Senior Directors & Directors announcing PI program, setting up meeting	Medium	Bill	Bill	3/3/2011	Complete	Approved by sponsor
13.0	Develop training materials and supporting documents for client seminar - first draft	Medium	Sam	Sam	3/3/2011	Delayed	

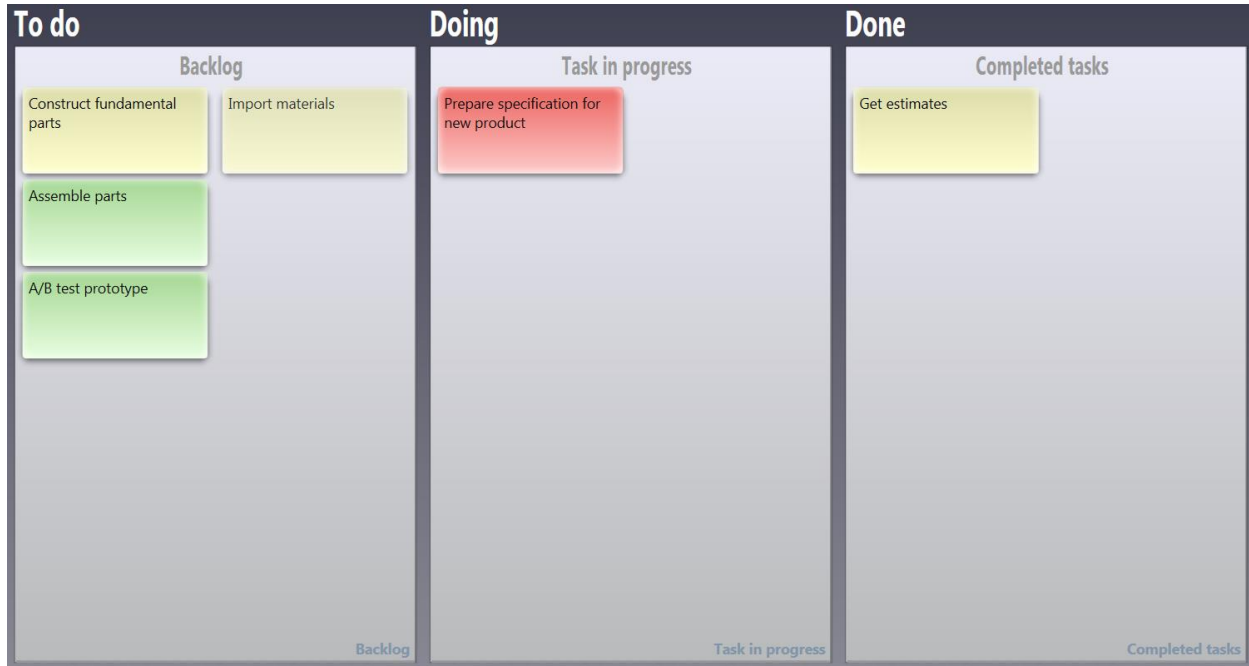


These are just few examples how things can get messy or complex and information can become garbage instead of real value.

Practice 1 – Get visual

Each member of the team needs to be aware of what is going on with their project/task list. Also, every team member should see the exact same thing. Put a whiteboard on the wall, so that the whole team could see it. Next, draw three columns – **To do, Doing, Done**. These are the fundamental states of each task or sticky note. Now grab those sticky notes from your monitor and put them on that whiteboard, to corresponding columns. In this simple step you have already achieved a lot – progress can be seen,

prioritize tasks by moving one over the other (higher priority = top most and right most position in column).



Such approach can be called board of transparency and knowledge. It will serve as a reminder and a law keeper, each one of you will be aware what is going on and what is the next most important thing that needs to be done. Moreover, any person that comes over to your headquarters can take a quick peek to understand the progress and state of your current project or assignment.

Rule 1 – Be precise and follow task/card description guidelines

Task card should consist of title or short description of what exactly needs to be done or what end value card brings. Next, you can specify the deadline and person assigned. Last thing is estimate or amount - write down how long it will take to finish the job.

Rule 2 – Task cannot take longer than 1 day or 8 hours

Let us agree on one really important rule – task cannot take longer than 8 hours or 1 day of work, have longer tasks? Split and decouple them until they are small enough and follow the previous rule. Why? The larger the task – the later you see progress. Project status latency directly derives from task sizes. If you follow the rule, you will have only one day of latency till you know that something is wrong or your project is running late. Otherwise, be prepared to be late.

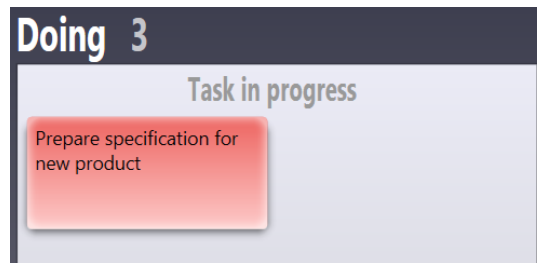


Option 1 - Measuring by hours does not fit? Measure by t-shirt sizes

There are many alternatives for task/card size measures. One of them is measuring by T-Shirt sizes, small task is S, medium is M, big is L, very big is XL. This practice will require some time to polish your estimates and of course only after few weeks or even months you and your team will understand how many M or L T-Shirts they can produce in one week or one month. Despite that, such method allows accurate estimates without worrying about distance for small and large tasks, for example you can have a small task and if you measure by hours you could say it is 4 or 5 hours, but basically it is the same, so you can easily loose or underestimate 1 hour.

Practice 2 – Recognize bottlenecks and limit your board flow

Every flow has its bottlenecks and tight spots – so is every process as efficient as its smallest bottleneck. This means that you can always have 4 out of 5 steps covered with good production but the last 5th step will make you pay in time and money by slowing down the whole delivery, so all those 4 efficient steps will become worthless. You can limit each step by team size or qualified member count. For instance our “Doing” step is limited to 3 tasks at the same time because we have only 3 engineers. Also, if there will be more than 3 tasks it would mean that someone is multitasking and wasting time (multitasking is bad because of switching between tasks and losing focus). Finally, such limitation can be a valve which you control. You can increase capacity by adding additional resources and the flow will grow.



Practice 3 - Involve your team

Daily meetings in the morning – each team member must answer 4 questions: what has been done, what problems and why did they occur, what is the next thing that will be done. Also you can transfer task cards and update their states on the board. Or you can perform this during the day. Status update only on daily meetings is the first step, to get everyone familiar with practice. Next step will be instant status update after the task is finished, but we do not want to push everyone to much. Team must feel comfortable and intact instead of overloaded with utility tasks just for project management.

Rule 3 – Daily meeting cannot take longer than 5-15 minutes unless it is really urgent to discuss force majeure

Time range depends on team size 5 minutes for less than 4 people and 15 minutes for teams bigger than 6 people. Project manager or team leader must be the showman and control the meeting. Set the clock, keep order and work it out – it will take some time.

Practice 4 – Knowing when to plan (Planning trigger)

Planning exact amount of work can be quite a challenge. Planning too much is always easier and later those plans can be thrown away just because project environment and requirements tend to change a lot. Thus, we should not waste our energy and time in planning when it is not required. On the other hand, how do we know when is the perfect time to plan? Answer is – use planning triggers.



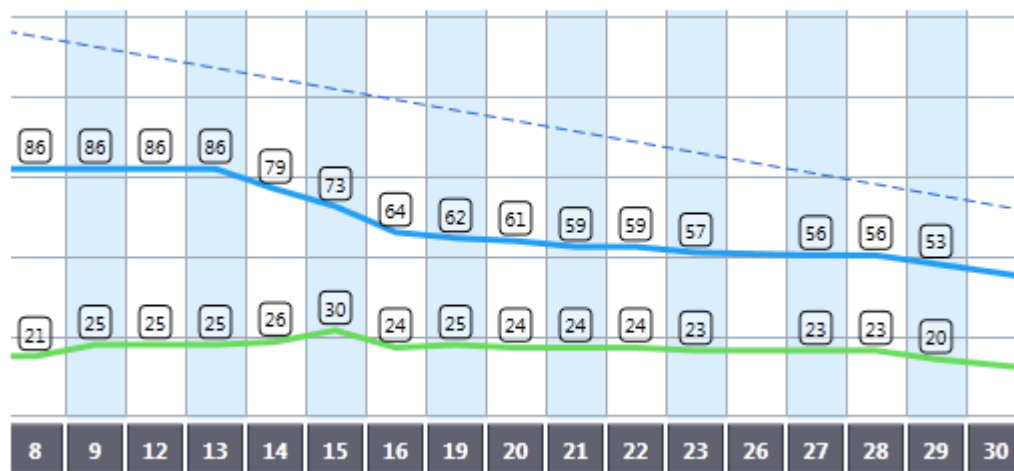
Here we have a board which has a limit of 3 on “Doing” state because only 3 engineers are in the team. Also, there is additional column called “Buffer” which serves as a planning trigger – in other words, it contains twice the tasks that can be done at the same time $2 \times 3 = 6$. So in any situation there are always a few things that are the most important ones and need to be done next as soon as there are free resources available. Each empty slot in that buffer column must be filled with tasks from backlog to keep the buffer at maximum capacity. Now when the backlog gets empty this is the trigger that you need to do the planning ASAP. The buffer will still have items at least for 1 or 2 days to keep your team occupied. For bigger teams buffer size can be even 3x or 4x the size of the team resources, just to be sure that project manager or team leader will be able to provide new tasks in time when buffer empties.

Practice 5 – Pull principle

Team goal is to work as a manufacture line, where items are pulled not pushed. In other words it would mean that team members pull tasks by themselves, when they are done with current one, instead of getting assigned. In most of the cases this will require some energy and thoughts how to organize a team to be versatile and prepared to take over any task that is performed by their teammate. Otherwise, you will need to plan tasks so that everyone in the team could pull at least pair of tasks from the backlog or other priority step.

Practice 6 – measure your performance

Calculate how many tasks you can complete in one week, two weeks and in one month. For such metrics you can draw a burndown chart (which comes from Scrum – agile methodology toolset for project management). Burndown chart has its start date and end date, also it has total amount of work in the start of period. Each day you burn the amount of work remaining and lower the value so the graph moves down till it reaches zero. Moreover, you should draw a straight dashed line which will symbolize ideal burndown rate. If the actual remaining work is above that dashed line – you are late, if it is below then you are all ok.



This is where the rule “tasks cannot be larger than 8 hours or 1 day” comes very handy. Each day you can see progress instead of waiting to update the burndown chart and noticing that you are late already. Also you will be able to calculate how much you can do in one week or one month, thus it will give a better understanding of estimates and your predictions will be more accurate in the future. Finally, such metrics will be core parameter to measure performance. Otherwise you will struggle in tracking your progress.

Practice 7 – Continuously improve your process

After each project phase or even on smaller occasions like the end of the month, you should do retrospectives/kaizen events, in other words - meetings to review what has been done, what were the good steps and which ones were not so. Also, the whole team should discuss what might have been done better and what needs to be changed to improve on next phase/iteration. After such event you should also adjust your visual board and process configuration unless you were totally happy with it.

Final word

To sum up, all these practices will take time and effort. You should start with few of them, “Get visual” and “Team involvement” could do. Later on, introduce new ones and try to improve existing practices. After you get comfortable around all of those, you should move to advanced level and implement even more daily routines and guidelines.