Get More of the Right Stuff Done with an Effective Visual Management Board | 074

Do you have a never ending to-do list? Do you find that you end up getting a lot of tasks done, but that the really important activities don't always make it to the done category? Do you see the value in visual management for the work on the floor? But if you're really honest, visual management hasn't quite made it into how you manage your own work day to day and then keep listening.

Welcome to Lean leadership for Ops Managers, the podcast for leaders in ops management who want to spark improvement, foster engagement and boost problem solving and still get their day job done. Here's your host leadership trainer, Lean enthusiast and spy thriller junkie Jamie V. Parker.

Our guest today is Kyle Kumpf. Now Kyle is a PMO Manager responsible for leading a team that focuses on process training and continuous improvement of the project portfolio management function within a growing bank holding company. And Kyle and I first met at the Iowa Lean Consortium annual conference. I think maybe back in 2018 and we stay connected through LinkedIn and, you know, just kind of on the offline world.

Now, one of the things I love about Kyle is that his purpose is to end human suffering as it relates to process. And one of his beliefs is that when we have simple visual systems in place, we can accomplish great things at work while having more time with our families, hobbies and interests.

Now Kyle is active on LinkedIn and I encourage you to connect with him so you can follow along with the great work he's doing. Remember that you can always find the relevant links at our show notes processplusresults.com/podcast. All right, let's dive in.

Jamie: [00:02:03] Kyle, welcome to the show today.

Kyle: [00:02:07] Jamie, thanks for having me. Excited to be here.

Jamie: [00:02:09] Yes, I'm excited you're here as well because I know that I started talking to you about coming on to the show a while back. And so I'm glad we're making this happen.

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So I know the topic we're talking about today. But first, I want to make sure everybody gets a chance just to know you just a little bit. So tell me a little bit about and the role you're in and how you integrate improvement thinking into the work that you do.

Kyle: [00:02:33] Sure. The role I'm in today, I'm responsible for several project portfolio management functions process. So what we do and how we do it, quality assurance, proving that we do what we say we do, reporting continuous improvement of all that, and then training of full time project managers and program managers and then also our part timers.

So those people in the organization who kind of do project management as a side business or side hustle and a part of their day job, you know, as needed, they need those that help as well. And so there are many things to juggle as you can imagine, and I'm constantly striving to find better ways of doing that work.

And then more recently, visual management has become a big focus of mine starting back, I think, in April or so.

Jamie: [00:03:25] Well, and I am glad that that has happened because, you know, there are a lot of things we could talk about, right? So, you know, we could talk about ending human suffering, which maybe you'll you'll be able to throw in there a little bit.

I know you've been doing a lot of posts recently on, you know, Deming and kind of some of Demings points and your interpretation of some of the there's so many things that we could go and talk about, but I'm taking us down a very specific path today because of this visual visual management work that you were doing. And I followed along on LinkedIn, and I know some other people probably did as well.

So, so a while back, you started this like work authorization board kind of an experiment process, essentially visual management of your work. And so I was following along, and I really just think it's relevant for this audience to hear about this process that you went through and kind of how you went from, you know, problem to experiment to learnings and what that looked like. So I want that's that's

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where I'm excited to talk to you about this today, and I want to start off just talking about like, you know, what prompted you to go down this path? Like, what was the problem you were trying to solve?

Kyle: [00:04:34] Mm hmm. That's a great question. There's an old adage that even a blind squirrel sometimes finds an acorn. And, you know, sometimes people, even if they're ineffective or misguided, they sometimes get lucky and are successful just due to chance. I didn't think that was a sound way to manage my work because I have a lot of things to get done and, you know, people relying on me. And so I was I was really struggling to answer.

I think about four questions, I was trying to answer that I couldn't and have a good way of answering. So those were what should I be working on and how long should it take? What should I work on next? What's my ability to accept new work without exceeding my capacity? And then how do I know that I'm on track? So those are those are I was struggling to answer those questions. That was my problem. And that's really what led me down the path of this, this board approach or this visual management approach.

I had read a lot around Menlo innovations. I read, read their books that Richard had put out. They talked a lot about how they manage their work visually. So I adopted a lot from that, and I had just read a lot of other articles and books around limiting work and process. That's really what gave me the idea to start down this path and start experimenting with it.

Jamie: [00:05:53] Ok, so and so, and I love this, right, so you've read a little bit about it and you said, Hey, I'm going to go down this path and particularly at making this work visual because you've got these four questions you're trying to answer.

Well, how would I know? And I think how how would I know is part of that last question? I think, right? How would I know? And so as you were getting ready to make your first board and let me back up just a second for those listening in? We're talking, we're really talking about your work, right? So this is not necessarily like you're not saying this is the work my team needs to do. This is your work for your daily work.

Kyle: [00:06:26] My work, I'm the one responsible for getting these things done.

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Jamie: [00:06:29] Ok. All right. So I just want to put that out there because here's what's going to happen if somebody's going to listen to it and then they're going to go and try and make a board for other people. And that's not what we're talking about, talking about a process to manage your own work. So when you were going through, you said, OK, I want to make this visual. I want to kind of come up with a board and you're trying to come up with your first one. What were some of the concepts or the factors that were really kind of guiding where you started from? Mm hmm.

Kyle: [00:06:53] So, one, I wanted it to be physical because I had tried the virtual kind of Kata boards and that window just got hidden behind other windows and then I forget about it. Mm hmm. So I post to my board up over here behind me. I walk by it every day the only way I could ignore it is if I didn't work in my home office. So it's always there in presence being physical.

It was also made out of readily available materials and describe some Post-it Notes painter's tape got a whiteboard. Very easy low-tech, but it's flexible because I knew that the first iteration of it, the way I laid it out probably wouldn't be the last. I think I'm on iteration like four or five now. So I knew I'd be able to easily change what I was doing as I experimented, experimented through it, and then I started to figure out, Ok, I wanted to physically constrain my work.

I don't want to be able to put more than X hours of work in a certain day. So how do I do that? Well, I set the boundaries with the tape. And I looked at different sized Post-it notes that would work well.

So I have these for once, people do see us on video. It's like my standard sized post-it is a three by three. That's the one hour of work. And those fold nicely into half hour of work, and I could even do 40 increments. I have smaller ones for 15 minute things to do, but they all fit nicely into this space that added up to eight hours of work.

So I could physically constrained here as much work I can schedule in a day. Can I do more than that? Yes, but I don't want to schedule 12 hours in a day if I don't have to. So that helped me limit the work and process on a given day, and then I put them in the order that they need to be done.

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So that gets that question of what should I work on next? And then the first one, obviously, everything is written down and based on the size of the post that tells me, here's how long I think this should take me to complete this work.

Jamie: [00:08:45] Ok. We'll put a couple of pictures in for folks who want her like visual learners and they want to see this. If you go to our show notes afterwards, we'll you can see all of that. But and I'm following along with what you're doing and I have a question, though.

So when you were first starting and you were trying to figure out like, you're trying, you know, you've got the different sized Post-its for different durations of work, but you had to assign how much time you thought something would take And so walk me through this, like at the very beginning. How confident are you that you knew how long different things would take?

Kyle: [00:09:23] Well, I've learned that the best way to estimate work is to estimate, estimate and then track it, because then you get better at estimating. So I would do that. I started off. That's why I started off with a 15 minute increments because I felt I could.

If it's five minutes, I'm not going to get down to that level of detail, right? And so I just started putting 15 in increments of work on the board. Some things I looked at kind of what the requirements were.

When I do look at, that's an hour, and that's all I would estimate out. If there was something longer than that, it would just be broken down into three separate hours of work because I was also reading to learn that, you know, try and sit with something for too long. You end up losing focus and get burned out on it, and it's good to have a breaking point and then come back to it. So that's why I limited myself to the one hour work.

So if there's something, I just really had no idea how long I was going to take. I might put a couple of one hour posts up there. So for two hours and then if I got in an hour right, that removed the next one. Now I got a blank spot. I can pull work forward. I can pull my work in if I need to. Ok? I guess it really kind of kept track of my work and how long it was taking, and that allowed me to get better, better at estimating those.

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Jamie: [00:10:32] Yeah, I have found that I'm very bad at estimating right now. It's something that I'm getting working on getting better in both ways. It's not like I always over or under like it can be wild spreads. Yeah, yeah. Ok, so you made your first board. You are estimating the amount of time you're scheduling out with constraints. You're tracking to see how the actual compared to your expectation.

And tell me what, like what worked really well as you started going through? Well, there's a first board or the second iteration or whatever. But as you were experimenting, what were some of the successes that was working really well? You're like, Oh, I've got to keep this part or I've got to build and strengthen this part because this is working. Really, it enabled me to focus.

Kyle: [00:11:18] First off, allow me to start off each week with just this confidence that. Based on what I know now, this week looks like I wasn't diving into Monday morning like, OK, where am I? What's what's on the docket? I kind of knew going in and obviously I knew it could change, but the board allowed me flexibility to change my priorities that week. So just that focus in that confidence helps. But I found immediately I was getting not just getting more done, I was getting more of the right things done. Hmm.

So that was my first big learning after I got kind of reflected that to my first week or two of working with the board. And then. Neal, on top of that, I'm getting all this work done. I was actually a lot more tired the first couple of weeks. I don't think my brain was used to getting so much time. Yeah, so much. Yeah, I found myself getting in the zone and just diving into work and getting it done and getting tasks done.

And, you know, before I was kind of used to the checklist or something, and, you know, an e-mail, a pop up and distract me or I get a phone call or something, and then I go on to something else, but I didn't have that thing to focus me, center me on what I should be working on. So my brain was worn out and I had to get it in shape. And so did it get better through practice? It did, yeah, it just kind of became the new routine. Now if I'm tired at the end of the day, it's just probably because it's been a long day and I'm I'm done working. But that's I feel like my brain has gotten used to being more productive.

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Jamie: [00:12:54] All right. So there were some really great wins there. You're able to be more focused or getting more done and you're getting more the right things done, which is probably why our brain hurts a little bit is because some of that right work might be a little bit more thinking heavy than just stuff.

But so but did it all work out great? Tell me what, what? Maybe what some of the lessons learned were or some of the things you had to iterate because it didn't work out as you were expected as expecting at the beginning?

Kyle: [00:13:20] Yeah. So one just the physical board layout, the first iteration, I didn't have all those days that the boundaries for each day defined with tape I just had. Here's my section that I know would fit 40 hours of work and I have the column headers for the days. So going in and trying to put the pieces on there, I kind of had to. You're okay, here's Monday's here's two days, though here's Wednesdays and get those all lined up, so that's when I went to the full column.

I made it very defined. Here's where each piece goes, so it's very easy just to put them up. That was one thing I noticed, too, I noticed that trying to plan out, you know, you hear people working in two week sprints. I first started to plan out two weeks. I'm like, No, it's a two week, two weeks. I found that the second week is always just changing anyway. So why even plan ahead of time anyway? So I cut it down to just doing the one week planning, which is just easier to do, I found than to. So yes, you're doing planning each week, but you take what you did one week and learn and then you plan your next week. So you build on that.

Jamie: [00:14:25] Yeah. So smaller cycles.

Kyle: [00:14:31] And then obviously, like we already kind of mentioned, some of my estimates were way off sometimes work. Took a lot longer, sometimes it took less time, and when it took longer. The good thing going back to the flexibility I now had on my work plan. So if something was going to take twice as long as I say it was going to be two hours working before, but that's the priority.

I just pushed everything down two hours spill over into the next day or it goes into the backlog for the next week. If I have to push it past Friday, or I can make the decision to just work overtime and get the work

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done that day.But very easily allowed me to see what's the impact of that shift? What's it going to do to my workload this week?

Jamie: [00:15:12] Hmm. So you're not necessarily scrambling on Fridays, trying to get those last things done?

Kyle: [00:15:16] Or if I got a phone call from my boss saying, you know, Hey, we need to do this because the CEO said so. Ok, well, I think it's about this much time and look at my, board, I could say, Yeah, I can get that in. Here's what's going to do, but I can get that in. And so I just took that stress away from. Before it'd be like, OK, yes, I know we have to get this done, but I have this stuff, I have to get done and now my brains is constantly thinking about that and not focusing on getting the actual work done. Hmm. Yeah. Ok.

Jamie: [00:15:46] What about like execution or discipline to following through? Tell me how that was for you? We're going to get into this is like my vulnerability moment.

Kyle: [00:15:55] So yeah, so obviously this board is just a tool. If there isn't a process and discipline behind it, that doesn't work. So I had to have the discipline to do the weekly planning to stick to the, you know, the size post notes for duration and all that I had to set to. I actually block the time off somebody.

My board matches my outlook calendar. So there's an hour task on the board. I put that on my calendar, my calendar. I don't look like I'm available to people for meetings, so people will joke you call your calendar is always booked up like, well, yeah, because I have to schedule time to get my actual work done. So I don't just get called in the meetings all the time.

So there was that bit of it, and to stick to that and not just say, Oh yeah, sure, I'll do that, so I had to learn to say, say no more or to say yes, I'll put this in my back log and then I'll figure out where it where it fits. And things like that so that that process and that discipline definitely took some time getting used to doing that and following that.

Jamie: [00:16:58] So when you think about the ability to start having more realistic conversations with folks, so other folks are saying, Hey, I need this or this is a priority, and now you're able to have those

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conversations. You know, I can. And here's the impact. It's a very different conversation than just like I'm just too busy or I just can't or, you know, whatever. Now you have, like, you have it all visual so that you know what the trade offs are. Mm hmm. So that you can make that decision. Exactly.

Kyle: [00:17:29] And that makes those conversations go much better than the the other response that I'm just too busy. Everyone's busy. No one's sitting around twiddling their thumbs. So they, you know, they know that I'm not lying to them just to get out of work. But when I can explain to them, here's what else would get pushed. If I did this now, then they can. Oh, and my request isn't as important. Does that one go ahead and do that one wait till next week? Yeah.

Jamie: [00:17:54] And if you do, I mean, so you do have this one week at a time, it really is not like it's oh, you can never schedule a call with me, right?

Kyle: [00:18:01] Because I even block off times that here's here's what I'm open, Right? Or people do schedule meetings off me in advance. If they're on the calendar, then that just goes on my board as, Hey, you have this meeting, which also might trigger me to say, Hey, you need to do some prep for that meeting. So then that goes on there as a half hour task or something. So then I'm picking that up all the time. So it's not just you're doing eight hours of actual work plus meetings, it's eight hours of work inclusive of your meetings and the prep and all that. Yeah, OK.

Jamie: [00:18:27] And the amount of time that you spend managing the board process, right, like managing the calendar process and the board process, how would you say that compares? Because I I've heard before, like I've said it before, actually. Like spending more time managing this process than I am saving through whatever. Tell me about your experience with this as you iterated your way through it.

Kyle: [00:18:48] Really, even in the beginning it probably takes me a good hour a week to plan because as things come up during the week or write it down on the appropriate site, it's supposed to know what the details. And that just goes into the backlog. So then that planning system comes. It's just looking at based on the information I've written down. Start putting them out there in the days based on what the desired due dates and prioritizing things that way doesn't take that long. And I don't always, at the

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beginning of the week, have enough to fill up the week. So I always know like stuff's going to come up, so I build in that flexibility as well.

Jamie: [00:19:25] Yes. Yeah, building in having the time prepped for there's availability, right?

Kyle: [00:19:31] I don't want to become isolated and become a hermit from the organization to people do need me need to talk to me and I want to be available to them, but I want it to be more. I wanted to control more of my schedule than having my schedule control me.

Jamie: [00:19:44] Yes. Yeah. Fantastic. All right. So what's next then in your experiment process, you've been doing this, you've gone through multiple iterations. Where do you go next with this?

Kyle: [00:19:54] So I've loved that this is physical, but I'm actually thinking about now trying to go back to a digital form. And the reason being is that my context has changed. So when I started this, I was an individual contributor. Now I have a team that reports to me and we all have work we're working on. And so having this physical board in my office doesn't really help them helps me.

And so I want to be able to help this team that spread across three time zones. You know, there are hundreds and thousands of miles between us, and I want us to be able to look at what's our collective body of work, what are we planning to do this week? And that way we know here's who's working on what. Here's what let's do. Here's a priority now we have something changes on my end. I can put it in there and we can easily see, well, here's how it impacts everybody else.

So that way, I don't say yes to something that then is going to cause a burden on my team that I want to do that and same for them. So I'm trying to figure out we have some new tech available to us in house that I think will probably be the next step for us to try. But I think going through this, this exercise, I have the past several months of this physical board.

It's again, it comes back to the process. I have the process down. I can then explain and teach my team in that process and then we can hopefully use technology to. Enable it and support it across this. you know, large landscape since we aren't in an office together.

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Jamie: [00:21:20] Yeah, I think that's so important is that is there is like the learning process before it goes digital. Is so critical. Yes. I've talked with organizations who are doing, you know, new technology or whatever, but they're doing new technology without the process existing outside, you know, beforehand, like, Oh, I'm pretty sure that's going to be a big hot mess when you try, when you try to say, Oh, now we have this new app that we're going to do whatever on, but we weren't doing this thing before.

Kyle: [00:21:51] So again, I researched a lot of this from Menlo. They were all on site paper based there in Michigan. Well, they weren't remote, so they had to figure out how we can do our work. And so I actually attended some, you know, virtual tours of theirs and it isn't as simple as using Microsoft or Office products that were available, and there's ways you can do this with Excel and PowerPoint and all that and you can get by, you know, the processes there, you just change the tool that you're using to run the process, given whatever environment you're in.

Jamie: [00:22:20] Yes, instead of saying, Hey, look at this really cool whiteboard tool or whatever tool, and now let's go figure out how to use it.

Kyle: [00:22:26] The answer isn't always like, Hey, let's go buy a thousand licenses. A thousand bucks a year pop for this cool, shiny new technology might work great. Might be an option, but maybe not the first one to jump to. Maybe you should jump to something in between first and get used to that and work your way up to it, for sure.

Jamie: [00:22:45] All right, so let's ask if you, let's say your best friend had this same kind of challenge, which is, you know, I want to be able to manage my work and not have my work, manage me, manage my calendar, not have my calendar, manage me. And so if they're facing that same challenge and maybe decided to embark along a work visual work journey, what would you say to them?

Kyle: [00:23:05] Come up with what questions you're struggling to answer about your own work and then develop the the process and tools to help support you in answering those questions daily. I actually had a friend reach out to me who had told me my experience on LinkedIn. He works here locally, works in satellite manufacturing, he's like, Hey, I love this.

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And he started asking me questions and then he sent me pictures of his body put up in his office. And here's what what I changed between hours and why. And here's what works for me, and maybe you should try this too. And so I got some new ideas from him, but that all came from him taking what I had posted that I did, coming up with what his own business context is, and then in reframing all that to work for him.

Jamie: [00:23:46] Yeah, I think that's so important what you're talking about, which is that this is a process you create like you go you went through the iterative process for yourself and you. You pulled from what you had learned and read and seen at other places. So you, you pulled from that. But it's not a copy paste, right? Because, right, so we got to find what is the right solution. And to your point, what I love about this is what is the question you're trying to answer? What is the what are you trying to understand about your work that you don't understand right now and build a solution that helps you answer that and helps you know that?

Kyle: [00:24:19] I think it's the best way to go about it, but it's not always the fastest way.

Jamie: [00:24:22] Yeah, but it's probably the more sustainable way.

Kyle: [00:24:26] Yes, it is. Yeah, but I think that's the initial hurdle that people will struggle to get over is, well, I want this done now. Yeah, you can start now, but it might take you two or three months to actually get into a routine that actually works for you.

Jamie: [00:24:41] Mm hmm. And so we give up to do that.

Kyle: [00:24:43] But then going through that process, you're also building the habit and so it becomes a habit that sticks.

Jamie: [00:24:49] Yeah, yeah, for sure. All right. So then as we wrap up today's conversation thinking about our audience, so our audience is primarily operations executives and managers who are not, you

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know, the Lean practitioners. They're not experts in this improvement model, but they are using improvement thinking to better lead their teams and better manage their operations.

So it doesn't have to be a direct, you know, kind of relevance here, but just in general, what words of advice or encouragement would you leave for those operations executives and managers who are tuning in today?

Kyle: [00:25:24] So we've talked a lot about process, so I'll borrow a quote from Deming and we said if you can't describe what you do as a process and you don't know what you're doing. So if no matter what level of the organization you're in, I would say. Help you help your teams define what their process is, what process would help them better manage their work if we're specifically talking about that and support them through that process.

And you know, whether you're using physical or visual or sorry virtual management, you know, like we said before, it's without that process, it's almost useless. You have that process and discipline. So so focus on those and then find it and attach the the tools that will just help you do that even better.

Jamie: [00:26:09] All right. Fantastic. Well, Kyle, thanks so much for joining us today. I loved, you know, the watching you go through that process, seeing some of your iterations, and I'm really glad you're able to to share some of that journey here with our with our audience.

Kyle: [00:26:21] Yeah, great. I enjoyed being on the show and I hope people are able to take some nuggets away and put them into action. Thanks for having me.

Jamie: [00:26:31] In case you weren't quite taking notes, let me reinforce a few things. Now the benefits Kyle saw from visually managing his own work board work, getting more of the right things done, knowing what the week looks like and having more confidence, flexibility and focus in his schedule and in his work and making better decisions, having better conversations with his colleagues.

What about the iterations and learnings? Well, Kyle learned that he needed to really define the constraints, make the constraints clear so he didn't overbook. He ended up moving from every two

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working in two week cycles to working in weekly cycles instead kind of shortened that cycle for planning, doing and reflecting. And he also had to learn how to estimate better. Remember what he said, though he said it's really an iterative process. The best way to learn how to estimate is to do it, to estimate, to do in track and then evaluate that same iterative process. And then finally, one of the things that Kyle said is, he said the board is just a tool if there isn't a process and discipline behind it, it just doesn't work.

Now, I got to tell you, as far as my takeaways, I really love that Kyle's whole iterative approach was designed to find a process that answers for questions. What should I be working on and how long should it take? What should I work on next? What's my ability to accept new work without exceeding my capacity? And how do I know that I'm on track?

So if you want to control your schedule instead of having your schedule control you, then Kyle recommends that you figure out what those questions are about your work that you need to know the answer to and then iterate your own way to building a process and tool that helps you answer those questions daily. And that, my friends, is your next step. Figure it out. What do you need to know or understand in the moment in the day to day in your own work so that you can get more of the right things done? Until next time.