

Visual Management: Not Just for Factories

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A partner in the tax practice of a law firm recently asked me, “How can I keep better track of the work the associates are doing? And how can I stay on top of the work I’ve delegated to them?”

Tracking work that others are doing is a common problem, particularly in a high-priced law firm, where the clients want answers to their questions at the most inopportune times — like the middle of dinner, or just after you’ve settled into watching *Toy Story 1 & 2* with your kids. To be fair, if you’re charging them \$800 per hour, you should be ready to answer those questions. However, hounding your team to get you that information — especially when they’re watching *Toy Story* with their kids — is a sure way to get your firm de-listed from the “100 Best Places To Work.”

Even if you’re not an attorney, you probably deal with this issue daily. Sometimes, things fall through the cracks. And even if they don’t, you don’t know the status of a project, or what a key member of your team is working on. Even more significantly, the effort to get yourself up to speed through phone calls, emails, and meetings, is an enormous time suck. And let’s face it: you’ve got more than enough time sucks in your life as it is.

So what can you do?

I think a kanban is an ideal answer. (For those readers who don’t know what a kanban is, for the purposes of this post, just think of it as a white board or bulletin board that’s visible in the work area.)

Put each person’s name down the left side of the kanban and create a row for each of them. Put the task they’re assigned in the next column, and the expected completion date next to that. If you want to be fancy, you can even include some symbol that indicates about how far along they are in completing the work. Have another column that holds a simple red/green signal that indicates they’re on track or they’ve fallen behind. And that’s it.

What you’ve created is a simple visual management tool that allows you to quickly see how each person is doing. Here’s an example of what it might look like:

	DOING	DUE	STATUS
Paul	Research prior cases	9-Jul	
Keiko	Examine client docs	9-Jul	
Kevin	Assemble tax regulations	20-Jul	
Frances	Manage budget	Ongoing	

TO DO
W
X
Y
Z

DONE
A
B
C
D
E

In this screenshot, I've adopted Jim Benson's [approach](#) (and terminology) by breaking work into three buckets: "To Do," "Doing," and "Done." This added information helps provide context for where you are in a larger project.

There's nothing earth-shaking about this tool, but I think it falls into the sweet spot between something that's too small for full-blown project management software, and something that's too big for a one-person task list. Having it prominently posted ensures that the work doesn't disappear into a computer file. And the red/green status bar enables someone to signal for help without having to schedule a formal meeting.

This tool is also a powerful way to manage processes. A client of mine, for example, struggled to manage their annual budgeting process. The president never quite knew where each department stood in setting their own budgets, resulting in far too many phone calls, emails, and document searches to determine where each group was in the process. We created a white board similar to the one below that made perfectly clear what stage each department was in, and what the next step was. As they completed each step, the president marched the "X" across the board into the next column.

MASTER BUDGET PROCESS							
	Send out budget	Review 1st Draft	Return w/ comments	Department head revision	Master reconciliation	Final review by Dep't heads	Final review & submission
R&D	X						
Product Dev.		X					
Marketing		X					
Sales			X				
Accounting				X			
HR							

You might be tempted to do something like this in a spreadsheet on the file server. I'd encourage you not to do so (at least at first). There's real power in having something physical and visible around which you and your team can gather for a discussion. You'd be amazed at how much the white board will focus your discussion and eliminate miscommunication.