

Guest was Jim Benson of Modus Cooperandi

Business 901

Business901 Podcast Transcript Jim Benson incorporates his background in cognitive psychology, government, and management to build community through policy and technology. His company, Modus Cooperandi, helps organizations change through the application of Lean principles, Agile methodologies, and social media. He is also the developer of the productivity tool Personal Kanban, an adaptation of industrial kanban which helps individuals and small teams actualize. His book on Personal Kanban, which applies Lean thinking to daily living, will be out in Spring 2010.

Jim's career path has taken him through government agencies, Fortune 10 corporations, and start-ups. Through them all his passion remained consistent - applying new technologies to work groups - in each case asking how they can be leveraged to collaborate and cooperate more effectively.

His goal with all technologies is to increase beneficial contact between people and reduce the bureaucratic noise which so often tends to increase costs and destroy creativity.

Personal kanban is an idea that arose from necessity. I began a personal kanban prior to starting Modus Cooperandi, but it didn't translate as cleanly from the programming and industrial world as I would have liked. It wasn't until one day when Corey Ladas and I sat down and really started to talk about the differences between industrial kanban and personal kanban that things really started to gel.



Related Podcast

Kanban too simple To be Effective?

Joe Dager: Thanks everyone for joining us! This is Joe Dager, the host of the Business 901 Podcast. Participating in the program today is Jim Benson. Jim is the principal of Modus Cooperandi, and the author of the upcoming book, "Personal Kanban". Jim, could you just tell me about your organization?

Jim Benson: Modus Cooperandi is a company that helps individuals and teams and organizations be more effective. And our primary weapons for doing that surround increasing the level and quality of communication that an organization, a team, or an individual might have. And we use Lean techniques, Agile methodologies, and social media to achieve those goals. And, in a nutshell, that's what we do.

Joe: What prompted you to write the book, "Personal Kanban"?

Jim: The nice thing about that is that... it was popular demand. In June and July of 2009, I had some pretty major life upheavals, and those life upheavals solidified a lot of the personal applications of Lean that I had been working on with Corey Ladas and David Anderson in the past. I was finally able to take the Lean techniques that we had talked about before, and apply them very well to getting me out of the torment that I was in.

That was work stressors, life stressors, family stressors, you know, everything was there all at the same time. So the outgrowth of that was Personal Kanban.

One of the most important things that came out of that was that in order to get through that, I had to use a mix of different types of visual controls. Each different type of visual control brought with it a different way to manage work, and a different way to mitigate risk. I was having a chat later on with some people, and said, "This is what I did." They responded that you got a blog about that".

One weekend morning, I went out and started writing, and the next thing I knew, I had written 20 blog posts. Over the next month or so I released those blog posts, and that spawned the Personal Kanban movement that's happening around me now. The book was a logical outgrowth from that, so that people can have a tangible object to refer to as opposed to a bunch of blog posts on a website, that are a little bit harder to read coherently.

Joe: What intrigued me about it is that I've been applying Scrum to marketing and I ended up with the "Scrumban" book by Corey Ladas. Now is that published by your company?

Jim: That's Modus Cooperandi Press, yes.

Joe: I ran across that, and it was similar to the way I organized things. However, I've always struggled between, on-line personal calendar and off-line. I always just wanted to drag and place things in a queue, and then break it out as I had time for it. That was it seemed like what you were doing. It was a very simple or straightforward but what intrigued it seems to be all about managing work in progress.

Jim: Right. Well, the universal truths that we're finding, and, you know it's dangerous to call anything "universal truth". So, we'll say "until we find a situation where it doesn't work, these appear to be quite applicable to a wide variety of situations". It's just generally a good idea to not do more stuff than you can handle, and it is a good idea to be able to see what you're doing. And that's why for Personal Kanban, those are my only two rules, is just, you know, focus on a few things at a time, get them done, and move on to the next things.

And, in so doing, while you're visualizing your work, you're going to:

- 1. Prioritize better.
- 2. Be able to see when you're taking on too much stuff in general. So, if your backlog gets too big, that becomes unmanageable.

Joe: Do you use in Personal Kanban, a Backlog similar to Scrum, or why don't you just explain to me the system?

Jim: That is an awesome question because Backlog Management is an art form. There are a lot of tools that people can use. They can use a Scrum-style Backlog Management system; they can use GTD, or "getting things done". What Tonianne and I do at Modus is, we basically create different projects, and those projects, aren't atomized until the last possible minute. We keep things in an aggregated form as long as we possibly can, which is a fancy way of saying that we procrastinate. But this is a good type of procrastination.

The other day I wrote and basically said; "You can put things off until the last responsible minute", which means that you're waiting until you have to get it done, which seems like procrastination, but what it actually is, is you're not doing something too soon.

So, lots of times we will start a task before we need to, and then as we're doing the task, more information or more knowledge will come to us and we will figure out "Oh! I should have done it a different way!" Then we end up having waste in the work that we've just done, because we started the work too soon.

On the other hand, there's the other type of procrastination which is the "I'm going to ignore it, until it becomes a problem." That's not good. Nobody wants to do that. Let's say we have a project which is "work on chapter eight of the book". That will remain that unit, chapter eight, until it gets to the point where we're ready to start working on it and then we'll break it up into individual tasks, because by the time we get there, we have got a very good idea of what chapter eight is supposed to be.

Whereas if we try and do all that planning up front, then, what we do is we basically guess, you have four months in the future, this is what chapter eight is going to need to be.

Joe: What happens if you break out chapter eight and you don't have enough time left?

Jim: Then you might have a problem. For something like our book, where chapter eight is part of a unit that is under our control, part of what belongs in chapter eight will also be a function of the amount of time we have left to actually do the task.

We'll go back to the Software Development model, because you had mentioned Scrum. The previous way that people have planned software projects is at the beginning; they try and guess all of the features that should go into the project, and then, all of the functional requirements that go under those features.

What ends up happening is, over the course of the project, 80 to 85 percent of those entire features end up changing. They migrate in some way. Then, you have to go back and edit your documentation to conform to the changes that happened in the software development process.

A better way to handle that is, to figure out what your deadline is, and what you would like to have completed by the deadline, and then, the through-put of the people who are doing the work. Basically, how much work can you get done in a certain period of time? And then, do you think we can get the minimum amount done by that time? That time should also include things like slack time, interruptions, and all of the other things that we tend not to, bring in to our work.

With the book, we get to fudge that because, it's under our control. We control what the deadline is for the book. But, for clients, what we do is, we revisit the decision making process all the way through the project. We meet at regular intervals, for some clients it's every minute of every day, others weekly, and others bi-weekly, monthly, or whatever.

We keep coming back, and you'll recognize this from Scrum in saying:

- 1. This is what we're doing.
- 2. This is what we're planning on doing next.
- 3. Are we going in the right direction?
- 4. Do you agree with this direction that we're going in, and if not, how should we move forward?

Then, what you do with your client, you'll say, "We're working at this rate and this is what our current projections are." But, one of the things I'll stop there and let you ask another question.

Joe: I enjoy listening; it seems that it's a very intuitive method to use, but it's still foreign to people, because it just about seems too simple. Is that a fair...?

Jim: That's absolutely fair, and one of my favorite things when I'm working with clients is going in and doing the initial value-stream mapping. Where we go through and I say, "OK, what do you guys produce? Where is value created? Where are hand-offs, and how does your product move from various stages, from inception to shipment?" We'll sit down and start to map that out. Invariably, there will be people in the room who are very dismissive of that process, because it's so obvious to them, what they do.

Also, invariably during the course of that meeting, there will be long discussions about what actually belongs in that list, or in that map. What ends up happening is everybody will completely agree on 80 or 90 percent of that map. However, there are little nuances that everybody has, about where value is created, or what's happening in the organization. And, those nuances; we can call them nuances, that sounds nice and cuddly; but, what they actually are opportunities for disconnects.

When people start to become disgruntled in a group, they're usually disgruntled over those disconnects. When they get together and talk about what the company does, they talk about the 85 percent that everybody agrees on.

That's one of the things I like about the tool is that; it, like any map; once you get your work up there, and you get your value-stream up there, and things start to move through, the depth of information that comes out of the Kanban is mind-blowing given the simplicity of the tool it's coming from.

Joe: No matter if there is disagreement you can still just make a note of it and wait and have a big discussion at the appropriate point in time?

Jim: When people are laying out their various stages of work, some of the disagreements might not be about the number, but the actual functions that happen in a specific column. What I've found, I was originally amazed by this where we'd go in and the biggest critics initially, would end up becoming our biggest fans by the end of the project. The reason was that the biggest critics were people who felt like they had a lot to offer, but they'd been disenfranchised through the organization, because there wasn't an opportunity for them to discuss the improvements that they saw and to make them happen.

Kanban and Lean give them not only the forum to have those conversations but also the permission to make recommendations and a tool on the wall to frame that conversation in a business-oriented way and not in a personal way.

So it's no longer the, "I'm upset because I can't get stuff from you because you won't give me stuff," it's "When we get to this stage in the process it seems like information isn't flowing well enough."

Joe: That's a little softer approach.

Jim: It's simply because when I am standing and having a conversation with you, we're meeting eye to eye that you're either going to be dancing or fighting. There are like the only two options. If we're standing side by side and looking at the same thing then we're compatriots solving an issue. I worry when I say things like that, because it sounds like consultant-speak and mumbo jumbo, but I've just, I've seen it work too many times to ignore it.

Joe: I actually heard a similar story from people who run Kaizen Events. You do want to get the disgruntled person, maybe the problem child or the complainers because usually that message has some value in it.

Jim: Yes it does.

Joe: If you put them on the team, you're going to gain the fruits of what they're talking about and you need that. I noticed, on your website where you talk about if you optimize your team and not your people, you're not really optimized. I really like that statement.

We all realize we have to make the individuals work to make a team work, but I noticed that gradual progression from personal to team, and maybe even Agile to Lean. Can you explain that progression and what you mean by that a little bit?

Jim: A hierarchy or a series of levels going from the personal level to the small team level to the group level and so forth up an organization. The personal or the individual level is, "I am here, I am part of this company and I want to do a good job, and I simultaneously belong to a couple of different tribes." So I have the tribe of me, the tribe of my group, and I relate to all of those differently.

But the level of difference between them becomes more pronounced as I become more disenfranchised from that group. I've seen many teams that operate very cohesively as a team, but they are outside of the organization. The organization doesn't value them and vice versa.

Any productive group that is inside an object that isn't part of that object is basically a cancer. So I've seen extremely productive, thoughtful, wonderful groups that act contrary to the needs of their organization, because of their disenfranchisement from that organization.

What I'm trying to do with using the Personal Kanban as a personal Lean. And then the Agile methods, and then the Lean methods is create information flow throughout the organization so that the individual feels like he or she completely understands what's going on at all the levels up and down from that person.

What's been my experience is that organizations are very good at blocking information and knowledge from being transferred from place to place. When that happens, the cohesion of the organization starts to break down. The more it is pronounced the more of a breakdown there is. Until you finally get people who are just like, "I'm going to come here. I'm going to act like I'm working. I'm going to get my paycheck. And I'm going to go home". Because they don't feel like if even if they worked they wouldn't be producing anything that anyone cared about.

We use these tools. We use the Personal Kanban on the personal side. This is what I'm doing and this is how I'm dealing with my day. Your team members can see that or if you have a team based Personal Kanban you're seeing at a task level what everybody's doing. The team then has clarity around what's happening around the team. This can be augmented with Agile techniques of daily stand up meetings or retrospectives or even in some cases time boxing, in order to give coherence around the product that they're creating.

Agile is a strongly team based approach. It was developed, because it was reacting basically to the same forces that I just mentioned. Agile was developed because previously there was only a waterfall approaches. What would end up happening is people would come up and say, "Here's 250, 000 functional requirements, I'll see you in six months when you've completed my software." And then they would get to the six month point and they say, "This isn't what I asked for?"

That wasn't a very good way to manage things so Scrum, and XP, and other Agile methods came along and said look we're going to come and we're going to talk to you much more quickly. We're going to talk to you every month, or every week, or every couple of weeks, and we're going to show you these little packets of value. The great benefit of that is that it greatly increased the amount of focus within the team.

Some of the issues that I've had with Agile methodologies, and I've been working with them for over 13 years now, is that they're so focused on the team, that the team stops looking outside of the team for guidance. The assumption is that since it's an Agile group, the rest of the organization is like "Oh, well they're Agile, so they can get things done really quickly. That's all we wanted in the first place, was for stuff to be done faster, so we can start ignoring them too." That didn't work very well. Agile supercharged the team, but it disconnected it at the same time.

Using the Kanban in the team, the big team, that's an information radiator, not only to those people in the team saying "This is what we're doing, and this is what's blocked, and this is how things are going." It's an information radiator out to the rest of the organization, because anybody can come by and see it at any time. It says at every moment what people are doing and since you can see what's coming up in the backlog, it shows everybody what's coming up. If anybody up the management chain can come and see what's going on, and they can make decisions based on that.

From the upper side, the C-level and VP's and so forth, ideally, those should be the guys that are feeding information into the teams at a rate which they can afford. When the team is pulling their tasks, those tasks should be in a queue that's not necessarily decided by the team, but by the people above them.

Joe: Does an organization need to be a Lean enterprise to make Agile? Do you need to be Agile to make Kanban work?

Jim: As far as Kanban itself goes, Kanban can be used basically at anytime by anybody, because it's just a way to visualize what's going on. So, you can use Kanban without being Agile, you can use Kanban perhaps without even being Lean. The use of the Kanban tool is going to start to encourage you to be Lean, because one of the interesting things about Kanban is that it becomes a game. And your brain starts to treat it like a game, and that game is "How can I work more effectively"? "How can I work more efficiently?" "What's gumming me up"?

If you line up a Kanban and you start pulling... you and your team start pulling tasks across it, and all of the tasks always make it 75% of the way across the board and then stop, you'll know that your system is not very effective, and you'll want to fix whatever it was that was breaking. Whereas before, when you didn't see it, it was just something that you could complain about.

Joe: It is so visual; can you use it with virtual teams?

Jim: Well, yeah. So Tonianne at the moment... I'm back in Seattle and Tonianne is in Washington D.C., and we use a tool called Agile Zen, and we work with our Kanban every day, and we have, I think, six Kanban going on right now with various projects. That's one of the most important things for me is... When I first got into software I was shocked at how software development organizations just couldn't deal with virtual teams.

The virtual teams kept breaking down, and people became more and more disgruntled. It's because there wasn't any clarity, there wasn't any real communication about what was going on and in Scrum, when you wake up and walk in into the office in the morning, you do your stand up meeting for what's supposed to be ten minutes but usually end up being forty five.

Joe: Everybody tells me they are ten minute meetings.

Jim: The format for that is everybody goes around and says what they did yesterday and what they are going to do today and while that ritualize communication is a lot better than what was there beforehand, what I found ends up happening, over time that becomes perfunctory and people aren't listening to other people when they are talking about what they are doing. If you got more than five or six people in your team, by the time you get to the end, you have pretty much forgotten what the other people are doing anyway.

When you turn to having the standup meeting focused on a Kanban, you tend to focus on the work and some work is flowing just fine and that doesn't really need discussion. Other work isn't flowing fine and that doesn't need discussion but one of the other things is that the people who are on the team, they get the ability to or they get the opportunity to look over what's coming up and what's going on that day and saying "Aha,

Jerry is going to do this and I've got this little bit of information that can help him." The collaborative, the opportunities for collaboration shoot through the roof when people have a visual peg on what is going on throughout the rest of the group. I've seen that time and time again. The thing is that is incredibly underappreciated, because when people do it, it seriously is two or three minutes of their time and they just don't care. But they've just save the team a half hour, two hours maybe a day's worth of work and no one realizes it.

Joe: One of the main points of Lean is pull and in Kanban the example is normally the old grocery store, you pull it off the shelf, you keep the six boxes on the shelf and as needed you feel the shelf. When I am looking at the Personal Kanban board, is that really there somewhere or who is pulling the work to be done or the work in process? Do you have a customer involved or not?

Jim: For a team the pull is happening when there is capacity upstream. So when the testers have finished the testing, they will place their current task into the ready queue to be pulled by whoever comes next in integration. Then they will reach over to the ready queue from people encoding and pull whatever task that has recently been completed encoding and they will start testing it.

Joe: I am just looking at the slide here that show Swim Lanes, when you say you have like six different Kanbans going; you really have six different Swim Lanes?

Jim: Yeah, yeah, definitely. The reason that we do that is, because different projects require different value streams and but also press are importantly when things like we have a distributed team, different projects involve different people. So, while Tony and I might be involved in all of those projects, they have different people. There are different people who are invited to each of those Kanbans.

Joe: What you are saying is there are different streams and the Kanban is constructed differently for each one?

Jim: I hope so. Corey Ladas is famous for saying he has never drawn the same Kanban twice. He has never drawn the same value twice. So, every time we get up to envision the work that is about to be done, there is always some new ones or tweak that we could come up with that make it just work, just a little bit better by doing something or learning from past mistakes.

Joe: When you are visualizing that, you really have different columns. One Kanban might have five, one might have six and all of them have different headings.

Jim: Absolutely. So the Kanban for building a deck is going to be a lot different from a Kanban of buying a house.

Joe: When we are looking at something like that, there is really an art form to build a Kanban.

Jim: Yes and the funny thing about it is that art form and like all art, you get better out with it through practice, but that art form is the understanding of what is happening in your life.

Joe: Wow!

Jim: So that's pretty profound.

Joe: Whoa, wait a minute. Let me get back from solving world hunger and narrow the scope a little. If we are sitting there and taking on a project, we will build a process or value stream map and then do we take those headings to build our columns?

Jim: Yes.

Joe: I mean can you really use this type of structure in other project management that you use let's say even in manufacturing or in a shop?

Jim: Oh absolutely since it came from manufacturing, definitely because all we are doing is we are saying human beings got to do a bunch of things and we want to see what it is that we are doing in order to be able to understand it better, manage it better and make sure that things don't fall to the grounds.

Joe: So this is really just a project management tool in itself and a scheduling tool?

Jim: Yeah.

Joe: We always talk about Agile replacing the waterfall projects. Is this really where Agile has developed? I mean do you think Kanban has or is this kind of a separate entity in itself that is going to develop on its own?

Jim: That is what's interesting. There has been a lot of debate in the software development community are you going to do Scrum or are you going to do Kanban which is like saying are you going to drive a car or are you going to have a stick shift?

You can Scrum all day long with the Kanban so there isn't a neither or. What's going to happen because this inevitably happens with everything that comes into popular use is people will conflate the tool with the methodology.

The Kanban itself is just a tool which is why on a personal Kanban side; it says over and over again, you can draw this thing any way you want. The only two rules of this tool are that you visualize your work and you limit your work in progress. After that I don't care what you draw. I don't care how you visualize your work, as long as it works for you and it gives coherence to what is happening in your work.

It is also one of the reasons why I start Personal Kanban with an incredibly simplistic work flow, because while over time people are going to mature in their use of the tool, it doesn't make sense handing them their first violin and saying, "OK, now you're going to play Mozart." You're not going to play Mozart when you first start off. You're going to play Twinkle Twinkle Little Star, and sometimes Twinkle Twinkle Little Star is pretty awesome.

So, I use the simplistic Kanban all the time even though I've created really complex ones, because the goal is to simplify what we're doing as much as we possibly can and get on to the business of actually doing the work.

Joe: Just to do this podcast interview as I'm sitting here with my notes, I'm thinking about it. I should really have a list of questions over to the side and the stories that I want to hear. As I ask them, I can move them over into the middle.

Jim: Oh absolutely.

Joe: And then move it over to being done. It's a perfect Kanban.

Jim: Absolutely. And then, that also lets you know, as you're going through, what the rate is of the questions being asked and answered. So, you can say, "OK, I know I've done six questions, but five of them were really fast and one of them took a little bit longer", and you can visualize that as well. You've got prep time in there, too. Before this, you sent me your introductory email, which had asked me a bunch of things to help prepare you for the call.

So, that would be where I would start. For you, I might have a future podcast's Kanban up on the wall with a bunch of people that you want, and then as you get closer you can pull it out to: ask, send introductory thing, scheduled and then actually have the call.

Joe: That's very interesting, and it makes so much sense. Now, one thing I did notice is that you work with some awfully large companies, also.

Jim: I've had the good fortune to have a pretty awesome career thus far.

Joe: The reason I ask, as we talk about this it seems like so much on an individual level and a small team level but we're talking World Bank, United Nations.

Jim: The funny thing about it is like somebody says, "Oh, you're from New York. Do you know Peter?" Large organizations are made up of people, and so even if you go in and you work with a Fortune 10 company or a giant organization, you're still only working with about 12 people.

While I'd like to say that I went to New York and I sat down with Kofi Annan and we had a really great conversation that did not happen. I did not go and hug everybody in the UN. I worked with some amazingly awesome people around the world with the UN, but it's one of the funny things about putting that on your website is that people are like, "That's absolutely amazing" and it is cool. But working with the UN and working with a start-up, when you actually get into the work, it doesn't feel that much different.

Joe: I don't know. I think on the last video that I saw of the UN I thought I saw post-it notes traveling going down the desk in front of him, and they were moving them as people were talking. I thought they all had their own Personal Kanban there. Is there anything you'd like to share before we end the podcast here, Jim?

Jim: Well, actually one thing I will mention is that recently, because of the Personal Kanban writing, I've actually taken on the opposite of the giant corporation clients, and I've had a lot of people coming to me and asking for just personal coaching. That has been an amazing experience. It's obviously been extremely personable and personal.

I've really enjoyed drilling down into what people feel is keeping them from being effective, and then coming up with ways that we can use, not just Kanban but all of the

tools at one's disposal to help them find ways to be effective in the workplace and to effect change within the workplace in an effective way.

Rather than them going to work and saying, "Damn it." This should be fixed, "saying, "OK, why don't you try doing these three things" and take the Gandhi approach and lead by example.

I was prepped for that, because a couple of our Kanban projects with those large organizations were ones where we were hired to come in and launch Kanban with a specific small team, so that it would actually promulgate out through the organization virally. From that, I have a bunch of theories about how cultural change cannot be an edict but needs to come from some viral bottom-up source with some, at least, tacit top-down approval.

Joe: Are you going to be speaking soon anywhere?

Jim: Let's see, on the 31st of this month I'm going to be giving a talk on Lean and social media and the intelligence community for Social Media Breakfast Seattle, and you can find the invite for that if you just search Social Media Breakfast Seattle. That's on the 31st of March. That's going to be a fun talk, and it's also going to be simulcast. It's going to be a live stream so even if you can't be in Seattle to see it, you can see it online.

I'm going to be doing a personal Kanban open space at the LSSC Lean Kanban Software Conference in Atlanta. That's on the 21st and 22nd of April in Atlanta, and their website is LeanSSC.org. I'm doing a couple guest lectures for MBA classes in the Bay area on the 1st and 2nd of April, and probably having some meet-ups and Lean coffees in the Bay area while I'm down there.

Joe: That sounds like a busy schedule. How can someone get a hold of you? What's the best way?

Jim: Ourfounder@Gmail.com, on Twitter I'm @ourfounder and our website is PersonalKanban.com.

Joe: I can't wait for your book. I look forward to that. That will be out this spring and, hopefully, in the April-May time period. The podcast is available on the Business901 ITunes store and also on the Business901 podcast site.

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What others say:

In the past 20 years, Joe and I have collaborated on many difficult issues. Joe's ability to combine his expertise with "out of the box" thinking is unsurpassed. He has always delivered quickly, cost effectively and with ingenuity. A brilliant mind that is always a pleasure to work with." James R.

Joe Dager is President of Business901, a progressive company providing direction in areas such as Lean Marketing, Product Marketing, Product Launches and Re-Launches. As a Lean Six Sigma Black Belt, Business901 provides and implements marketing, project and performance planning methodologies in small businesses. The simplicity of a single flexible model will create clarity for your staff and as a result better execution. My goal is to allow you spend your time on the **need versus the plan**.

An example of how we may work: Business 901 could start with a consulting style utilizing an individual from your organization or a virtual assistance that is well versed in our principles. We have capabilities to plug virtually any marketing function into your process immediately. As proficiencies develop, Business901 moves into a coach's role supporting the process as needed. The goal of implementing a system is that the processes will become a habit and not an event. Part of your marketing strategy is to learn and implement these tools.

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