

Ep #44: Kanban Made Easy: A Lawyer's Guide to Visual Task Management



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John E. Grant

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Hey there, welcome back to *The Agile Attorney* podcast. I'm John Grant and I help legal professionals of all kinds harness the tools of modern entrepreneurship to build practices that are profitable, scalable and sustainable for themselves and the communities they serve. This week on the podcast, I'm going to respond to a listener request and thanks Dave for sending it in. And Dave has read my ironically unfinished book that I have available on Lean Pub. It's called *Kanban for Lawyers*, and there is a link to it on my website at agileattorney.com/start.

Don't look for it on Amazon, there is another kanban for lawyers book on there that seems to be the product of a content mill or weird AI thing. And it's exactly what you'd expect from that sort of content. Before I jump into Dave's request, a quick programming note. For those of you who have been listening a while and that number is growing, which is great, thank you. Just a heads up that I am playing with the format of the podcast a little bit. So, for now, I'm going to do away with my pre-recorded intro and that also means I'm going to get rid of the pre intro hook and I'm just going to sort of get straight into my episode content.

And I think that'll take a little bit of the length out of the podcast and as much as I love my theme song, I'm definitely an 80s synth-pop kid. I want to make sure that I'm getting you my listeners, good quality information as efficiently as possible. So, I'm going to experiment with it. See how I like it. See how you like it. If you have feedback, obviously shoot me an email john.grant@agileattorney.com. I would love to hear what you think. So, for now, I'm just going to get on to the show.

Okay, so my unfinished *Kanban for Lawyers* book. This is a funny topic for me, because the whole thing about the kanban method is stop starting and start finishing. It's about getting things all the way to done. And here's this thing that I started, and I actually think it's pretty good, I like it. I've gotten really good feedback about it, and it's not finished. And I'm not sure that it ever will be finished in that format.

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I started writing it probably seven or eight years ago now and I was in a very particular headspace. I had a perspective on the kanban method and the needs of lawyers that was true at the time and I'm just not the person I was when I wrote or when I started writing that book. So, it's still available, because I think it's good, I want to make sure that the content stays up there. A lot of my understanding of the kanban method has changed a little bit since I started writing it, which is another reason why I haven't really finished it in that format.

But I still think that the chapters that are there can be really effective, and they can be really effective for the thing that Dave is asking about, which is, what can I do when I am just buried in work, when my to-do list is flowing off the page? I'm feeling totally overwhelmed in my day-to-day activities. How can I use kanban as a tool to try to make myself more productive, more efficient, or at least make sense of all of this demand that I have for my finite time and attention?

So, I'm going to go old school and I'm going to describe how to build a very simple kanban board on your wall using a whiteboard or maybe just a blank space of wall and some painter's tape, or you don't even really need lines for the columns. You can put some headers on the wall and your brain will draw the columns. It is a very simple system.

And then if you want to do this in a kanban tool, obviously I have talked a lot about Kanban Zone is one that I like a lot, and they have some basic templates in there already. But you could use Planner. You could use Trello. You could use any number of very simple kanban systems. We're not talking about building the ultimate kanban workflow for your entire law firm right now. We're talking about using kanban to make sense of the avalanche of work that you've got on your desk today.

And honestly, if you want to hit pause right now and get some very basic supplies, you could do this just following along with the podcast. You don't

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have to but get yourself a pack of sticky notes and a pen, a sharpie works best, but any pen will do and we're just going to start building. So, I want you to start by creating three column headers and again you can use a sticky note for this. One of them is going to be to do. One of them is going to be in progress. And the last one is going to be done.

And this is the simplest possible kanban board. You can't boil it down any further than this. One of the things we're doing with this tool, with this method that is different from the to-do list, or the checklist is we're having that in progress column be sort of explicit. It's right there in your face. The problem with a traditional checklist is that it's easy to see the work that you have left to do. And then when you've checked it, you can see what's done, but it doesn't give you a good sense of what's in progress.

And as I have talked about for many, many episodes on this podcast, it's that work in progress that is the killer. It's the number of balls that you're juggling at the same time that gets you to the point where you're not paying so much attention to the individual balls that you're juggling as you are the spaces between balls, that administrative overhead to track and manage and just sort of have the work taking up space in your brain, your systems, whatever.

And I'll admit, if you are a fancy bullet journaler, you might have an iconography that you use to delineate in progress tasks. If it's working for you, I don't necessarily want to get you to change it, but if you are just using a traditional checklist, if you've got that yellow legal pad with just lines and lines and lines of to-do's on it. Then I think rearranging things into this simple kanban workflow can be really impactful. And so, we're going to take those column header stickies and slap them up on the wall.

And again, if you're doing this in an online system, just name the columns, to-do, doing and done. Probably any kanban system is going to have those as your default anyway. If you're using a whiteboard, maybe you draw

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some column lines between those stickies. If you're on a wall, maybe you could throw some painter's tape or something up there to give yourself a line. But like I said before, you don't really need the lines. Your brain will draw the lines, it knows what a column is.

Now here's the thing I want you to do is get the next sticky or again create a card in your tool and I want you to write on it 'build kanban board version one or V1'. And I want you to put it in your doing column. And I want you to take a step back and I want you to notice that is the thing that you are doing right now. Obviously, you're also listening to this podcast, but the activity you're engaged in is building that kanban board.

And now I want you to take that build kanban board V1 sticky and move it to the done column because this is all it takes to have a version one kanban board. You are done, this is it. You've got, it's a minimum viable product, but it's something that is useful. It's also something that had a pretty clear scope, and it's something that we could accomplish in a single sitting, and I will talk a little bit about that unit of time in a minute. But the most important thing is that it is something that is done.

And I really want you to get in the habit of getting things across that finish line and into the done column. So, we'll talk about that more again in a minute.

Here's what I want you to do next. Take another sticky note and write on it, 'build kanban board V2 or expand kanban board', or something. We're going to keep building this thing out, but this building of the kanban board is something that is taking up your capacity, your finite time and attention. And so, I want you to go ahead and throw that new sticky into the to-do column, although we might move it into in-progress very, very soon.

Okay, here's what I want you to do next. You've got that pack of sticky notes. Now, I want you to set a three-minute timer on your phone, on your

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watch, wherever. And I want you to sit down with that pack of sticky notes and write out on different stickies, all of the things that you have got in flight right now. What are the projects, the tasks, the emails, the whatever that you have started working on, but maybe aren't completely done yet, and I want each of those to show up on a separate sticky.

And again, this should be at the task or what I sometimes call the task set level. And I'll get to that unit of time I described a minute ago. I want these to be things that you can accomplish or maybe someone on your team, but this is personal for now. So, I want it to be something that you can accomplish in a single sitting. And I don't know exactly how long a sitting is, but I think it is more than a few minutes and less than a day. And it's something where once you start working, you should be able to work it all the way to done without stopping.

And the reason we're setting a three-minute timer for this, it's a tool out of the agile world and other places called time boxing. And what we want to do is make sure that you are engaging in sort of a focused mental sprint of getting these things out of your head and onto paper, but we don't have to be 100% complete. We just need to get most of the things out of your head, because if you're already overwhelmed by work, we don't want to basically create the entire laundry list of things you need to do.

It's going to come anyway, once you start working, you're going to think of other things that you're working on, and you can always add them later. But this initial brain dump is something that's really better to do in a time-boxed setting and if three minutes isn't enough, repeat the timer, take it to six, take it to five, whatever it takes but don't let yourself go on forever and ever about it. And by the end of this exercise, you're going to have a little pile of sticky notes in front of you, it might look like your front yard in autumn.

Now, before we put those stickies up on your board, I actually want to do a little bit of board design work to build out a slightly more robust version of

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this tool. So go ahead and take that, create version two of the kanban board sticky note and put it into the in-progress column. And then here's what we're going to do.

First thing is we're going to add another header, so I want you to take a sticky note and on it, write the words 'waiting on others'. And then I want you to take that sticky note and put it between the in-progress column and the done column. So, we're basically adding another state that is a waiting state, but it's very specifically to capture the things that we have started and then sent to some other person or entity. And we can't really do much on it because we're waiting on somebody else to do their thing before we can continue or finish with ours.

So now we have a four-column board. We're a little bit more robust. We're going to add a few more columns and we're going to do it in the to-do section of the board. And let's start by creating three more header stickies. One of them is going to say today. One of them is going to say tomorrow. One of them is going to say this week. And that's going to get us started. Now, if you want to, we can actually go even further to the left. This is called upstream in the kanban methodology.

So maybe you want to go even further into the future, but I think the further into the future we go, the less specific we should be. And so, the two other headers that I like to use, one of them is sooner or soonish and the other is later. And so, these are things where when you put them up on your wall or again, building them in your software, you're effectively creating a funnel of work that is going through these various time horizons to get to your today column and then eventually your in-progress column.

And this is really going to help you eventually with prioritizing work and also seeing the quantity of work that you've committed to. And I'll talk more about that in a minute. For now, go ahead and take down the to-do sticky note and replace that with today and then go ahead and build these

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additional columns off to the left. So, you're going to go tomorrow and then this week, and then soonish and then later, and that's probably going to be enough for now.

Now, once again, I want you to take that build kanban V2 card and stick it in the done column because we've done it. We've created a version two of this tool. It's not that hard to get things done when you scope it the right way and when you commit the time to actually doing it. And now that we've got this sort of slightly more robust structure of our kanban board, I want you to take a few minutes and for that pile of stickies that you created a minute ago, I want you to place them on the board in the appropriate column.

Now, if you remember, my call to action for that time box was to capture the things that you're already working on. And so, most of these things probably are going to go either in the in-progress column or in the waiting column. But my guess is that you probably already have started to capture things that you need to do in addition to things that you have already started. And so those are the things that are going to start to go in either today, tomorrow, this week or sometime in the future and what you're doing in this exercise is planning for your finite capacity.

Now, there's a few other little things you can do here with the stickies, with the cards that might help you down the road. You don't have to do it right out of the chute, but these are some techniques that tend to be pretty useful early on in your use of a kanban methodology.

Number one, if you have access to some different colored sticky notes. You might think about using a different color sticky for different types of work. And I know I already had you brain dump and so this is going to involve rewriting some stickies. That's okay because it's going to give us some information. Again, if you don't want to do this, not that big a deal. But I find

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it can be helpful to designate one color sticky as client delivery work, whatever your practice area is.

If you have a lot of practice areas, you could even have different colors for different practice areas, but you don't need to take it quite that far. I think just having one color for client work can be helpful. And so, if you do have multicolored stickies, I want you to actually start creating a key. So, pick a color, whatever your client work color is, write the words 'client work' on it and then maybe up above the board or maybe off to the side you'll basically just have this notation that this color that I chose, I'm going to say blue is my client work color.

Then you can pick another color for internal work or on the business work and again write down 'internal work' on the business and put that sticky up in your key. The third one that can be useful is personal work or personal tasks. Your capacity is finite regardless of what you're using it for, and so especially if you are a smaller practice or even not, if you're just sort of managing your personal work, having that sort of personal tasks thing can be helpful on the board. So three colors, again, you can expand it out a little bit if you want to, but I wouldn't go crazy at this point.

The other thing that you can start to do sort of right out of the chute that can be really helpful is to try to begin to scope the work. And so, what I mean by that, if you, for the cards that you've written, pick a corner, let's say the bottom right corner. And I want you to just, for every card that you've created already, think about how much time you think it's going to take you to complete that task and get it all the way to done. Don't get too granular here.

So, if you think you can do it in 15 minutes, maybe write a .25, really a .5, a half an hour is as small as I recommend most people go, although again that little half task can be okay. But once you get above sort of an hour and a half, I would just start using whole numbers. Don't estimate 2.75, that's

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not realistic anyway. We're not going to stick to it that way. Big numbers are fine, no one's going to hold you to it. And we actually want to sort of use these bigger numbers to our advantage in a minute.

I would also, sort of coming back to this unit of time that is a sitting, if you've written something on a sticky note and your brain is saying, "Yeah, I need eight hours, I need 12 hours for this." What I would suggest is decompose it into multiple parts. And I think a sitting, a reasonable sitting really isn't any longer than about four hours. So, if your number on that estimate is bigger than four hours. So, if your number on that estimate is bigger than four hours, break it down, break it up. Get some discrete chunks of work that you can actually finish in that single sitting.

And again, if you're following along while you're listening, obviously you're going to need to hit pause. This is going to take you a little while. Maybe as long as 15/30 minutes, I'm not sure. But we really want to get a good handle on the work we have committed to in the near term and be able to, number one, make sure that we understand what the scope of that work is, what we think the time commitment is going to be. And then you're going to go ahead and place those cards on your board in the column that you think is most appropriate for that work.

If it's something that you've started already but haven't gotten across the finish line, I want you to put it in the in-progress column. If it's something that you've started but you've pushed it off to some other person. Then it's going to go in the waiting column, the external waiting column. If it's something that you've only barely started or maybe haven't started yet, then it's going to go upstream in one of those to-do columns.

And I'm going to leave it up to you whether it goes in today or tomorrow, later this week, etc. But I want you to really sort of be realistic about what can you reasonably accomplish today. And that's one of the reasons to have that scoping, that time estimate on the card. If the number of cards

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with time estimates adds up to more than eight hours in your today column. You're probably not being realistic about what you can finish today, which means you now have to start making choices.

And in fact, there's one other little tweak that you might consider making to your kanban board columns that's going to help you with this, and this is establishing a WIP limit or a work in process limit. And so, on that sticky note for your in-progress column you might take it down and in parentheses after work in progress, write to the number eight, which is to represent eight hours. If you have more than eight hours' worth of work in process at any one time, then you're not likely to be delivering that work in a single sitting.

Same thing goes for the today column and the tomorrow column. We're trying to scope our work in a way that is realistic and that makes it highly likely that we're going to be able to get it done when we intend to get it done. And if you're pushing more than eight hours of work into any single day's sort of container for work, you're setting yourself up for failure. Now, the number can be a little bigger on your this week column. You might be tempted to put 40 in there because you've got a 40-hour week. But remember, you've already got today and tomorrow.

And so, I would recommend maybe thinking about using the number 24 for that number. So now you've got a week's worth of work that adds up to 40 and the rest of the week is kind of set at a relatively smaller number. Then for that sooner column, maybe that's where you have 40. So maybe you use sooner to plan a week in advance, and this is your best intentions. You're not going to get held to this, but it's just a container. It's part of this funnel to get work into your active working system.

And then later might be more open-ended, sometimes in the agile world, we'll call this the backlog. And it often is unbounded, there's not always a WIP limit on that. You can build this funnel out as much as you need to, but I think this is a pretty good system for a starting point.

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Alright, so after you've finished all of these things that I've just suggested and again, it could be a lot, but I think it's an investment that's going to be worthwhile. And what you're going to be able to do is take a step back and you're going to have this eight column kanban board on your wall or again on your screen. And five of those columns are going to be part of your to-do column, so it's the funneling work into your active capacity. Two of those columns are your in-progress columns and then you've got done, which is the happiest one.

And once you've got all of those stickies out of your head and onto your board, you're going to be able to engage in some better sense making and planning around how to attack all of this work. And I'm assuming if you're like most lawyers I know and most people I know that you've just created a lot of cards and that's okay. It can actually be a little bit overwhelming, a little bit stress inducing at first, but we're going to use it to your advantage and we're going to use it to allow you to more confidently get through the work and get more and more of those tasks and tasks that's over into that done column.

Once you've got all those cards on your board, I want you to do a couple of things in terms of organizing them. The first is to reality check them against your WIP limits. And we've only put WIP limits on a few columns, but I want you to look at the math. Take those estimates of time for all the cards you've got in that column and see whether it goes over that WIP limit or not. Now, in the in-progress column, leave them there. You're going to be over the WIP limit at first and that's okay. We don't want to move things out right away but what I do want you to do is prioritize the cards by relative importance.

And so, the most important cards should go at the top of that column, and the less important cards should go at the bottom of that column. How do we determine importance? It's kind of up to you. I would start by saying that if there is a deadline approaching, then that card should be closer to the top.

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I'm going to go on a very brief tangent and I'm going to talk about the difference between a deadline and a delivery expectation date, maybe a due date. In the agile world we sometimes call this a service level expectation.

I consider a deadline to be something that has a true consequence if you fail to deliver the work by that deadline. These are things like statutes of limitations, perform by dates in a contract, court scheduling deadlines, whatever it happens to be. But these are things that have a definite consequence where if you get something in before the deadline, no big deal. If you get something after the deadline, then something bad has happened and maybe something extreme, but either way it's going to take some work to recover from.

That's different from a due date or an expected by date where you've promised the client that you would get them something in three days and you maybe fail to deliver within those three days. But it's probably not the end of the world if it takes you four days or five days, or sometimes maybe even 10 days although we don't want to get into that habit.

So, coming back to prioritizing work, we're going to first and foremost things that have an actual deadline with consequences are going to go up to the top of the column. After that, or if you don't have any actual deadline driven work then what I want you to think about is one of two ways to prioritize the work. The first one, and this is the method I want to become your default in most of the work that you do is to prioritize it on a first in first out basis.

And I did a whole episode around this, that's episode 27. You can go back and listen. But the basic idea is that we want to deliver work in the order that we committed to it. And so, the oldest tasks would go up to the top. And like I said, I want this to be your default policy. So, if you don't know

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how to prioritize something, that should be your fallback, the oldest stuff goes first. The newer stuff goes after.

The other method that I think you can use right now, especially while you're engaged in this sense making. And while we're really trying to sort of get work off of your plate and into the done column is to actually sort the work by the least amount of effort it's going to take in order to get it to done. Which is to say, the things that are closest to being finished should go up to the top of the column regardless of when they came in. And things that are more in their early stages should go to the bottom, and that's certainly true for your in-progress column but that can also be true.

Well, as you go upstream, you're going to tend more towards a first in first out, but if you've broken work down into multiple stages, then sometimes you might want to take the second part of a multipart task and elevate that to be a little bit higher because we want to get the whole thing done. We don't just want to get parts done. And again, I already did a whole episode on this concept of close the closable which is getting things done and off your plate. That's episode five so you can go back and listen to that for more detail.

Once you've arranged the cards within the columns, you're good for now. You can actually start working the board. Use the board to get things across that finish line and into the done column. As a coach, as a trainer, I want to see the number of sticky notes in that done column really stacking up. It should be like a telephone pole outside of a concert venue. There's a lot of material on there when you've really been sort of working the board in a good way and it feels good to see that.

Make sure you don't ignore that waiting on others' column. There's actually a little bit of work you can do there which is to follow up and maybe nag a little bit those people that you're waiting on. So sometimes that's the stuff that is actually closest to done. You've got influence but not control over

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when it gets done and you should carve out a little bit of time to use that influence when you can. But mostly you're going to be working on that in progress column.

And I want you to really think about getting the things that have been in progress for a while, get those done and off your plate, get them where they need to be. Things that you have started a little bit, but maybe not made as much progress on, get those done too. Get yourself down under that WIP limit. And then once that in progress column has capacity in it, then you can start pulling tasks from your today column. And you should pull from the top of that column into the in progress.

And eventually I'd like to see that WIP limit for the in-progress column gets smaller than eight. It should actually go down to maybe only two or three cards at a time, if even that. I mean realistically you can only do one thing at a time. You may have a few balls in the air and that's okay, but we really want to keep the amount of concurrent work that you're processing and managing to a minimum.

Alright, I'm going to leave it at that for today. Thank you for listening. If you found today's episode interesting or useful, please share it with someone you think would benefit from a more agile approach to their practice. If you've got questions, feedback, questions that you'd like to hear me address on the podcast, you can reach me at john.grant@agileattorney.com.

I've said this in my outro, that's pre-recorded, but it really does help me if you go on to Apple Podcasts or Spotify and give me a rating or a review, it helps other people find this podcast better. And as always, I want to say thank you to my production team at Digital Freedom Productions, they make me sound good. Thanks for listening and I will talk to you again next week.