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# Visual workflow – driving productivity in the office environment

**A tool from the factory floor can be the key to more productive, satisfying work for white-collar staff**
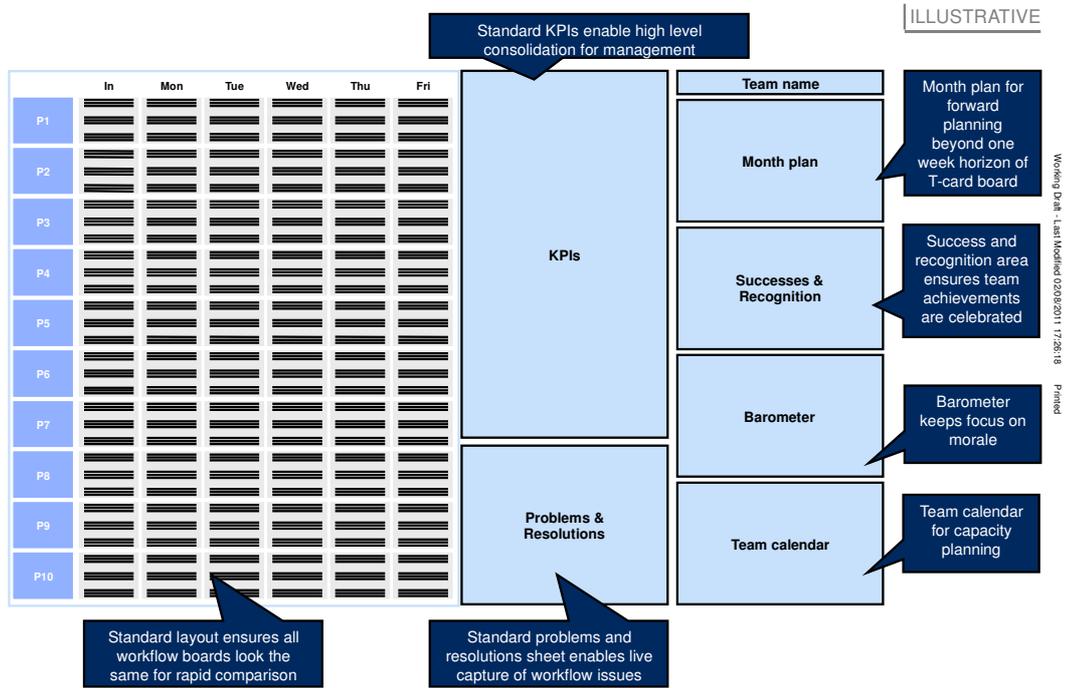
*by Simon Middleton*

Support functions, from HR and finance to product development, have to manage a complex mixture of repetitive, project and ad-hoc work. Teams must prepare updates and reports on a regular basis and must ensure that both internal and external customers are handled in a timely manner. They must also respond at any time to unexpected requests for action or information from across the organization – frequently urgent requests from senior managers who are unaware of the disruption they cause. On top of all this, staff may be asked to spend considerable time in meetings to discuss, review and plan their work.

This environment makes it extremely difficult for managers and team leaders to measure and improve performance. Their teams may be working on multiple projects simultaneously. Without knowing who is doing what, it can be hard for leaders to help their teams prioritize tasks. Problems arise from this lack of transparency. For example, work may be unevenly allocated, with staff overwhelmed some days and under-occupied on others; or issues that threaten the delivery of important work may not become clear until it is too late to fix them. Most importantly, without a clear understanding of exactly how tasks are being completed, it is almost impossible to identify performance improvement opportunities. These issues drive poor utilization and productivity of staff simply because tasks are not effectively or efficiently managed. Contrast this with a manufacturing line, where basic measures of productivity (i.e., the rate of product being manufactured) are far more abundant and widely understood.

We have seen the support functions in a range of companies gain enormous benefit from a simple but extremely effective visual management system: the T-card board (Exhibit). Such boards are a familiar sight on factory floors and in maintenance workshops, where they are used to allocate tasks and to track progress. It is rare, however, to see them adopted in a white-collar service environment.

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## Exhibit: A standard workflow board layout aids communication and simplifies cross-team reviews

ILLUSTRATIVE

Standard KPIs enable high level consolidation for management

| | In | Mon | Tue | Wed | Thu | Fri |
|---|---|---|---|---|---|---|
| P1 | | | | | | |
| P2 | | | | | | |
| P3 | | | | | | |
| P4 | | | | | | |
| P5 | | | | | | |
| P6 | | | | | | |
| P7 | | | | | | |
| P8 | | | | | | |
| P9 | | | | | | |
| P10 | | | | | | |

KPIs

Problems & Resolutions

Team name

Month plan

Successes & Recognition

Barometer

Team calendar

Month plan for forward planning beyond one week horizon of T-card board

Success and recognition area ensures team achievements are celebrated

Barometer keeps focus on morale

Team calendar for capacity planning

Standard layout ensures all workflow boards look the same for rapid comparison

Standard problems and resolutions sheet enables live capture of workflow issues

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SOURCE: McKinsey & Company

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## Building and using the board

Typically, the T-Card board is set up to show a one or two-week schedule of work for a single team. Each team member has their own section on the board, with a limited number of slots per day. This limit is designed to keep the workload to a realistic volume, helping to minimize overtime and highlight capacity constraints. Regular tasks, including meetings and other project or administrative activities, are each recorded on a T-card in a standard format and allocated on the board by the team member at the beginning of each day.

Each morning, the whole team meets in front of the board for a performance discussion. Lasting 15 minutes, and with a tightly structured agenda, its aim is to discuss the jobs allocated for the day, review the completion status of the previous day's activities and highlight any problems. Unresolved issues and key performance indicators are displayed next to the board for quick reference and provide a fact base for performance discussions.

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During the day, team members tackle each of the tasks allocated to them and, when the task is finished, turn the relevant T-card over in its slot to show it as "complete." This allows anyone to understand the current status of the team with a quick glance at the board. For example, if by mid-afternoon there are still a significant number of cards not showing the "complete" status, it is immediately apparent to team members and senior managers that work is not progressing as planned and remedial action can quickly be taken.

When requests for ad-hoc work come in, perhaps as the result of a telephone call or email from a customer, the team member receiving the request takes a blank T-card, fills in the details of the task and then places it in the next available slot on the board. Different colored T-cards highlight the different classes of work. For example, all ad-hoc work may be tracked on white cards, while regular tasks use green cards, and meetings orange ones.

## The impact of the card

The introduction of T-card boards can have a rapid and profound effect on the way work is managed in support functions. Because each team member has only a finite number of slots in which to allocate tasks each day, the tradeoffs between competing tasks that may previously have been implicit, become explicit. Team members are able to give their customers much more reliable estimates for the delivery of work requests. At the same time, the daily reviews of upcoming tasks mean that teams more consistently prioritize work that is most important, rather than the customers who shout the loudest. A real-time visual record of task progress helps team leaders too. They can see at a glance if a team member is struggling to achieve what they need to do and can intervene as necessary, providing coaching and support to help them improve their performance. Or they can reallocate tasks if one team member becomes overloaded.

Furthermore, team leaders can use the board to streamline some activities. For example, a team leader can see all of the meetings their team plans to attend for the day (each shown on a color-coded card) and has the opportunity to reduce unnecessary meeting attendance – a common problem in office-based functions. At one large institution, the introduction of the T-card systems precipitated a 20 percent reduction in total meeting time within a month of its introduction. The company was able to reduce the number of ad-hoc meetings and standardize core customer and team meetings into a regular pattern with set agendas and attendees.

Most powerfully, a clearer understanding of the way work actually flows through a department provides the foundation for continuous improvement efforts. Often for the first time, team leaders and senior managers can see which teams are able to complete tasks most efficiently. This allows them to identify best-practices that they can communicate to others.

The workflow board also enables effective problem capture, allowing issues to be tackled in regular problem-solving sessions with team members and management. At one company, recording ad-hoc work requests on the T-card board made it immediately obvious that a large amount of work was coming from a small minority of customers, for example. Managers were able to interview these customers, discuss their requirements and see if more of that work could be scheduled in advance to reduce its disruptive effect.

## The impact

The introduction of a visual performance management system in the white-collar environment often creates significant concern among staff. They fear that it may add an administrative burden or reduce the autonomy that they see as an important part of their professional roles. Sometimes managers resist the idea too, expecting systems of this type to be automated and embedded into IT solutions. It can help to explain clearly to front-line staff and team leaders that the workflow system aims to improve the efficiency of the team, improve customer service and allow more time to be spent on true value-adding activities. Ultimately, however, it will take a leap of faith to pilot the system and see it in action.

In our experience, demonstration is usually compelling, and attitudes among staff typically change within a few weeks of the introduction of a workflow management approach. The ability to physically move tasks and reassign, track and complete them, together with the regular interactions at team performance discussions, help to bring the work to life. The simplicity of the T-card system also means teams can fine-tune and improve it to meet their specific needs. By contrast, an IT-based solution can be harder to evolve and less interactive.  Once comfortable with the operation of the card-based workflow system, some companies explore the potential use of IT solutions to automate the production of KPIs and simulate the interactions using virtual T-card boards.

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Workflow management systems can be a core part of the "journey to lean" for business support functions, providing a solid basis on which to track and improve performance. The clear, visual representation of work is something that workers and team leaders find useful and satisfying too. Such a simple, powerful approach has been confined to the workshop for far too long■

*About the author:*
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