

*Unfinished -
draft*

Little book of workflow management

Making your business more
effective and more productive

Allan Kelly

Little book of Workflow management

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This book is available at <https://leanpub.com/littlebookofworkflow>

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Abandoned book

This is an unfinished book. Now, some nine months after starting the book, and about six months after stalling I have to say: *it is unlikely to ever be finished.*

As with so many of my books it started life as a challenge to myself. In this case the challenge was to write something which applied many of the ideas prevalent in the *agile software development* world to a more general business setting. I proved to myself, and perhaps a few readers, that I can re-describe those ideas as such.

British politician and prolific writer Roy Jenkins reportedly told a younger author once that books are not so much finished as abandoned. In the case of *Little Book of Workflow* it is being abandoned before all the chapters are written. Actually, there were only a few more chapters I wanted to add even if I had ideas for many more!

That also means that I do not plan to take this book through the production process of copy editing, cover design, and physical publication, or the assignment of an ISBN.

Thus, this book is full of my own version of English: typos, a few spelling mistakes, multiple wrong words (where the spelling checker has replaced my word with something spelt correctly but which is a different word) and my own idiosyncratic grammar. My apologies dear reader, thats the way I write.

The good news is: now you you have bought this book, if I should change my mind and add material, if I should have it copy edited or changed in any other way you will immediately get free updates.

Feedback

I believe there is value for both reader and writer in sharing these ideas even though they are unfinished. I share so you might learn. Perhaps you can try these ideas and send me feedback on your interpretation.

Allan Kelly allan@allankelly.net

London, March 2025

Who is this book for?

Anyone who wants their work to be better - be that faster, cheaper, higher quality, more timely, or some other criteria.

Those who work alone will find useful advice here but really this book talks to people who work in teams, and especially people who are responsible for the work of teams.

This book explains ideas which have become common in some fields - car production or software engineering for example - to a wider audience so it shuns technical language. If you find the language I use too technical please get in touch. I will do my best to a) help you and b) fix the language for future readers.

Preface

When you work alone you have a lot of control over out output. If you work harder, or longer, you will produce more. When you work with others, as a team, perhaps with different specialisations, then it can be a different matter. The whole team will benefit if one person works harder and increases output. But all too often raising output requires the co-ordinated action across the team.

The thing is, when you work with others you are working as part of a system and systems have their own dynamics. Simply having one cog in the system work longer or harder doesn't necessarily improve total output. Conversely, it is often possible to raise output by changing the system without anyone working harder or longer.

To complicate matters there is the question of tooling and technology. The tools and technology have a big influence how productive the system is. Some tools will simply increase productivity. Yet to get the maximum benefit of new tools the system needs to change. A team will need to co-ordinate work practices change.

Nor is it only a question of productivity. Working harder and faster, using the latest productive tools, does not automatically means more revenue and profit. Your system may exist within a system: you increase productivity but discover the sales team can't sell more.

Or maybe by producing more you reduce the scarcity and price falls. Rather than producing more maybe you should produce better. There is more to being effective, and profitable, than simply producing more.

Along the way there are many ways things can go wrong...

Years ago I worked at a well known news agency - although it might be better called a data provider - where I was on the receiving end of process improvement. The company hired some consultants who wrote a new process, told us what the process was and then told our managers to police the processes.

The one size fits all approach was crazy in a very diverse organisation. Over beer one of the senior managers in my department said “It is like pouring cement on a fast train line.”

During that stage of my career that wasn’t a unique experience. So, I have always shied away from associating myself with process improvement. But, when I look at what I do, well.

I have spent years helping companies, and the teams within those companies, become more effective and productive. Again and again I find that the way work gets done is, shall we say, somewhat random. Bringing even a little order to this massively improves things. Makes for happier employees, more satisfied customers and high ROI.

Yet I also know that introducing a defined process, a method or methodology, is just as likely to make things worse than better. The way to bring about improvement, and the way to make it stick, is to work with the people.

So, *Yes*: things need to change. There needs to be “process improvement” but that change needs to be a learning process. Improvements need to be shared activity and it needs to be ongoing. It needs to involve those doing the work and proceeds gradually so it is a shared journey. Rather than driving change with authority it needs to be through inspiration and collective will.

Historically most of my clients have been in the technology sector - that is why my company is called *Software Strategy*. Yet, there has always been the odd team which doesn’t do technology - I vividly remember a team of accountants. In recent years I’ve been in more conversations about such teams. More recently I’ve been

talking to [MarinaAlex](#)¹ over in Tennessee who has been working with restaurants, hotels, dentists and many others in the same way.

This little book set out to share some of my experience in the most accessible way I can. The challenge I have set myself is to describe how to improve workflow, in the most understandable way I can, to those beyond the technology world.

In the software technology space these ideas go by the name of “Agile” but actually many of them trace back to “Lean” and draw on the Toyota Production System. It doesn’t matter which label you use, just know these ideas have been tried and tested. View this as a learning journey. As with all learning, the more you know the more there is to learn.

So, if you like call it agile, or call it lean, call it continuous improvement, call it kaizen, or even organisational learning.

Some would call it common sense but common sense can be very a rare thing. Some of the ideas herein may look like counter intuitive at first, give them time and they will look like common sense and you will wonder how you ever work any other way.

¹<https://www.swaysystem.org/>

Sample

This sample book omits most of the chapters. The full book is available at [LeanPub](https://leanpub.com/littlebookofworkflow), <https://leanpub.com/littlebookofworkflow>².

Buyers of the unfinished draft book will receive free updates as the book progresses. Until then this book will only be available in electronic form from LeanPub.

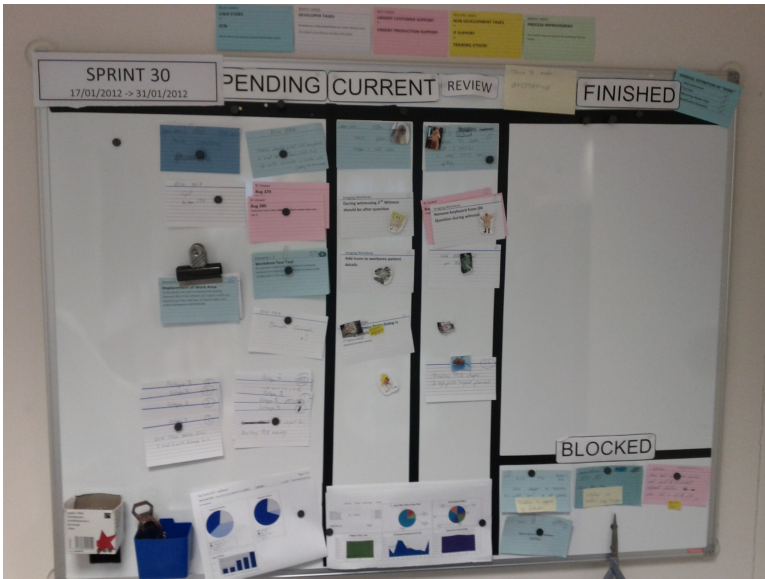
²<https://leanpub.com/littlebookofworkflow>

10 easy changes to make work better

1. Visualise the work: Create a visual tracking board with the expected steps. 2. 3. 4. 5. 6. 7. 8. 9. 10.

I Getting started

1. Improvement starts by making work visible



Work waiting to be done, in progress and moving towards done

A few weeks ago I bought the wrong ticket at a Spanish railway station. I went to the customer service desk and was surprised by the lack of a queue. It took me a while to figure out but there was a queue.

Instead of standing in line there was a machine which issued tickets and a board which periodically told a ticket holder to go to a desk. I got my ticket and quickly realised I wasn't going to make my train. I'm sure you've seen this sort of queue. Whether at a supermarket

deli counter, post office or elsewhere, Spanish railways are not alone in taking an tried and tested system, queuing, and adding new technology.

Orderly queuing turns out to be really important in managing work. I frequently take a similar, if slightly more sophisticated, approach to improving work at clients.

In the days when all work was physical you could look at the work and see what state it was in. Work might be flowing quite nicely from one work station to the next and out the door to customers. If work was blocked or impeded you could see it. And when you could see a block you could do something about it.

Today much work is “knowledge work”, it isn’t so much things getting stuck as ideas, whether in documents, e-mails or on someone’s laptop. Even work which still has a physical dimension, like a restaurant order, may get stuck digitally as it flows from the waiters terminal to the chef. When work only exists in the ether its hard to see where it is stuck, where queues are forming or why problems are occurring.

Whether looking to increase output, reduce blockages or almost anything else, making the work visible is an essential first step. Only then can you see what is happening.

Once you can see the work then blockages and bottlenecks become obvious. Next they can be fixed.

Visualising work can be done in a variety of ways but most boil down, like in Barcelona, to representing work as a token - typically a card or ticket. Then tracking progress on a board - like the one above. While I’m still a fan of tracking work on a physical board (it creates rich learning for everyone) it is often more practical today to use one of the many digital tools available.

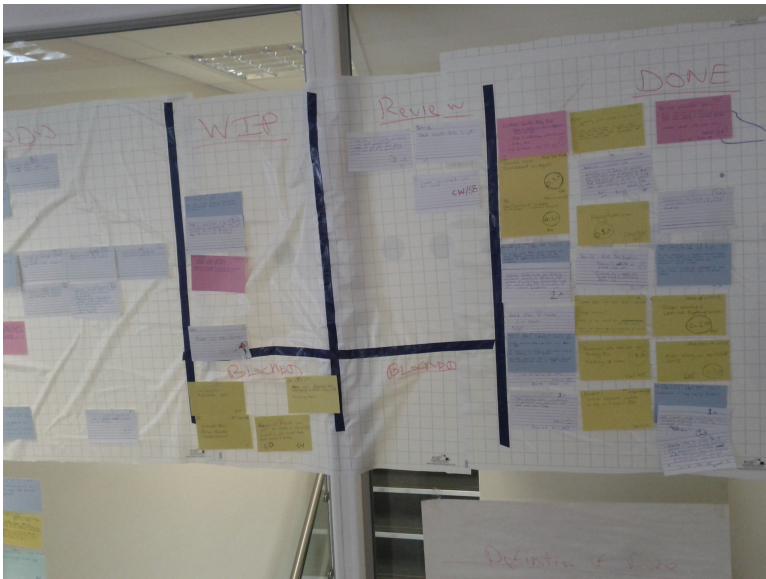
Improving the work and increasing output begins when designing the tracking board itself. While most people start with three columns - to-do, in progress, and done - it is worth spending some

time to think carefully.

In future posts I'll talk about board, and workflow, design. For now just remember: the first step in improving work is to make it visible.

Lesson: Make work visible, set up a board where tickets can be tracked

2. Benefits of a live work scoreboard



Even this improvised board immediately delivered benefits

In my last chapter I suggest the first step to improving work was to make it visible. Once it is visible it becomes possible to see where the problems are and to fix the system.

Actually, do you see what I just did there? I called the way work moves a *system*. I'm taking a system view of work, thinking like allows you to reason about the work and improve it

One team I worked with in Slough were bedevilled by people asking the status of urgent work items, "Is it done yet?". Setting up a crude

tracking board - above - immediately resolved the interruptions. Rather than people asking they could just look at the team board and see the state of work. Tracking work like this creates a **live status report**.

When setting up a board I like to inspect the workflow process. Where does work come from? Does it get prioritised? Are there stages to the work? Maybe an order is validated, picked, packed and put in a queue for dispatch. By breaking the stages down means everyone else see status and I can see where problems are occurring.

One common problem is work becomes blocked - maybe because a part isn't available, or because somebody is not answering their phone. Sometimes I'll create a special space were blocked work can be parked, other times I'll put a mark on the ticket - a red dot in the physical world.

As the work, and its tracking ticket, advances it will frequently queue as it moves from one person to another. So orders queue until someone can validate the parts are in stock. It queues again waiting for a picker to become available, and then queues yet again waiting for a packer. Finally it sits in a big outboard queue until the shipping company comes at 5pm.

Thus it can be useful to have a queue, or buffer, between each stage. Tickets only sit in a work column while they are being worked on. The rest of the time they wait in one queue or another.

Frequently improving effectiveness, productivity or timeliness, simply involves work to resolve blocks quickly, stop blocks happening again, reducing the queuing steps or making one process more efficient.

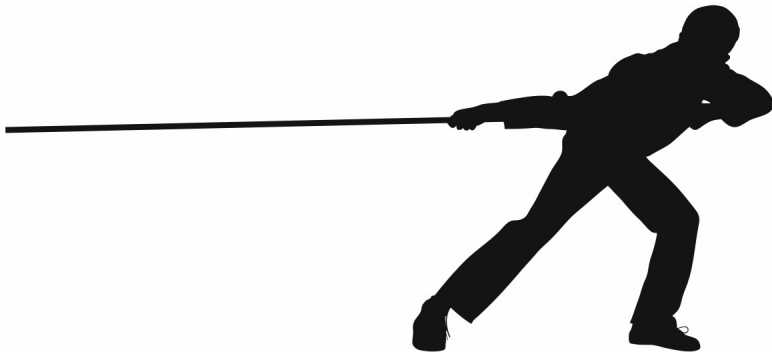
There is also one big change that can be made, at very little cost, that can radically improve flow, but it is counter intuitive and deserves a whole piece to itself (coming soon).

For now think about how you can represent blockages and queues. See if you can visualise were work is getting stuck, then think about

how you might resolve those problems.

Lesson: Identify where work waits or is blocked in your workflow and then look at how to reduce impediments (hint: it isn't through working longer hours)

3. Pull, don't push



A return visit to a Bath team made my heart leap for joy. Inspecting the team board one of the team, call him Bram, told how the task he was working on was taking longer than originally expected, but would be finished sooner.

Bram stepped up, he had picked the task up because he could see the usual person, the person who would do it quickest, was busy. Previously everyone stuck to their own specific area but Bram could see a priority not being done. Although it wasn't his normal thing he picked it up. It would take Bram longer to do but he saw that it would still be finished sooner than if it waited for quickest person to be available.

Visualising work makes such things possible. You learn to read the board. Everyone on a team can see the state of work and everyone shares responsibility for getting it done. But, visualising alone is not enough.

Those who will do the work need the authority to choose their own work, and, they need to pull the work. Rather than push work at

people, and it then wait, staff are trusted to pull the work as they have capacity.

I've already talked about visualising the work [\[\[link\]\]](#), and letting work queue [\[\[link\]\]](#), to this I'm adding: **let people choose** which work to **pull** and when to pull it. Remember: work on one thing, complete it, move it to done, take the next. Work on one thing at a time.

Letting people choose the work they will do when they are ready to gives them a voice. It gives them discretion. They are taking responsibility. It demonstrates trust and utilises their knowledge. So there is every reason to believe they will be motivated to do the work they choose to pull and higher productivity will follow.

Workers are not some machine which just acts on instructions. They are expected to make their own decisions. They are part of the solution not just the gofer. If a machine could just do their work then a machine should do the work, but if there are humans in the system then trust them.

A visual board shows the priorities and while they probably, should, take the next most important piece of work there are reasons they might not. This is a bit different to most traditional work processes and rests on the belief that the people who do the work know best what they can do when they can do it.

The whole system works because work is only pulled when it can be done. Consequently, workers are more focused and problems become visible. Hence called a *pull system*.

Managers responsibility shifts from allocating work today to increasing throughput over time. I'll say more about the changing management role in a future posts.

Lesson: Don't push work on people. Let staff pull work when they are ready.

4. Control intake

5. Limit WIP - Time to use the wip

6. Shared to do list

7. Shared planning

8. Break down: Big goals and small tasks

9. Make you board central to everything

10. Team board not project board

II Improving

“There is no improving the future without disturbing the present.” Catherine Booth, co-founder of The Salvation Army, 1829-1890

Many of the changes discussed in the first part of this book will have resulted in improvements to workflow, effectiveness and productivity already. Yet this is only the beginning, now it is time to get serious about improving work.

11. Worse before better

The story so far: visualise work, allow work to queue and let people pull work when they are ready to do work.

If you have been following my advice you I expect you are already seeing some benefits. I also expect you are seeing some problems. Hopefully the benefits outweigh the problems and you keep going but lets not ignore the problems.

The question to ask is: are these problems which existed in the system before you started tracking work visually? Before you created the board? Before you asked people to pull work rather than push it?

Sure some of the problems you are encountering are problems of operating a new system - any new system. And things like not pushing work requires discipline, and that discipline can be hard. But put aside those issues and look at the problems you can now see.

I can't see your board and I can't hear your questions but I'm prepared to gamble and say most, if not all of the problems you can now see, existed before you changed the way of working. Problems of work blocking, problems of overloaded workers, bottlenecks around individuals or machines, or perhaps skill-silos.

The thing is, the machine you have created is a problem detector. When you make work visible you also make problems visible. Sure this way of working will fix some problems right out of the starting gate. It will make many more visible. Some of them will be problems you have known about for a long time, and were choosing to ignore; others were problems you have had for so long you had forgotten about them; still more are problems which you never saw before.

The fact that this system surfaces problems is itself a problem. Frequently exposing problems often makes things look worse. At this point some people loose faith in the system and revert to their old ways.

But, if you can keep the faith this is definitely a case of: *it gets worse before it gets better*. All those “problems” are opportunities to improve. Your aim now is not just to fix a problem and get work flowing again but fix the root cause of the problem so it doesn’t happen again.

With each fix you remove one impediment, one future blockage, you will never know how many problems you fixed before they ever occurred. This allows the system to get faster, more effective and more productive. This is the essence of continuous improvement, or *Kaizen* to give it a fashionable Japanese name.

In my experience, even as you see new problems you are also seeing benefits. Some benefits arrive almost too quickly. But, the problem of *problems* is: there is nowhere to hide. This system creates improvements because it surfaces problems and prompts you to fix them. As you fix them it gets better and better.

So, if you have any leadership role, you need to work to fix problems and be seen to fix problems. The aim is to create a virtuous circle where by problems are surfaced, problems are fixed, everyone feels good and has the energy to go around the loop again the next time a problem surfaces.

This isn’t going to happen unless problems are fixed and people feel safe in exposing and talking about problems. This is where you need some *psychological safety*, but is also a chance, as a leader, to demonstrate psychological safety in the way you treat people.

Ignoring problems, pushing them from one state to another, and punishing people for discussing problems, then things will only get worse.

Lesson: Things might look worse before they get better but with

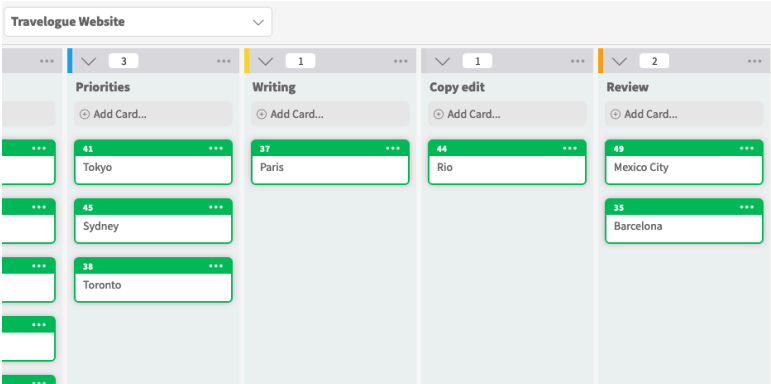
each fix things get better for ever

12. Management change

13. Where to find improvement

14. A culture of fixing blocks

15. Moving backwards? - when quality makes you faster



16. Marooned work

17. Waiting for ...

III Going further

18. Improvement through retrospectives

IV Scaling down to one

19. Working alone

I am regularly asked “Can I apply these ideas to my own work because I work alone?”. The short answer is Yes, but, since most of the techniques are team focused getting the best results may require a little adaptation.

Years back I read somewhere that a joke in the training industry that compared *personal productivity* courses to *diet programmes*. I don't know if the joke really existed but there are clear parallels.

Almost everyone thinks they would benefit from being more organised or carrying less weight. Everyone has good intention to do better and there is money to be made selling people what they want.

Many people join workshops to improve their organisation skills and many people sign-up to diet programmes to loose weight. However, dropout rates are high and many fail to follow through.

Real change is hard. One might think changing oneself should be the easiest thing to do because you don't depend on anyone else. You are master of your own destiny. There is nobody to get in the way or to blame.

But it is also the hardest thing to change. You have to do it by your own will power and determination, you have to keep challenging yourself. Perhaps thats why group based diet programmes have a better reputation than others.

Now many of the techniques and ideas outlined in this book can be applied to one person working alone but that does not make them easy. Actively applying these techniques to your own work will require self-discipline. And that might be the biggest obstacle.

The next few chapters discuss how these ideas can be applied when working alone and modifications you might need. I have seen

benefits from applying variations on these techniques to my own work. I will share my own experience and what I have found.

However, my productivity on any given day owes more to whether I am feeling well, or sickening for a cold; whether I am eating and sleeping well. So, as well as considering your working practices avoid getting ill.

That might be easier said than done but you can keep your immune system healthy. Eat a good diet, take regular exercise, look after your mental health and most of all: invest time to ensure you are sleeping well.

The techniques outlined in this book for managing workflow can work when you are on your own. Make it visual, limit work in practice, prioritise, plan and replan, stop-starting new work and start-finishing partially done work. (As I'm trying to do with this small book right now!)

But, you need to need to remember you are alone and there are additional challenges. Freedom to do what you want does not solve all problems.

So be prepared to look at how you are working and experiment with different systems until you find one that really works for you.

20. Solo is not a team

21. What works for Allan

22. Techniques for one

What tool is that?

Some of the visual tracking “Kanban” boards used to illustrate these chapters are, as you can tell, pictures of physical boards. More often today tracking boards are electronic online boards similar to those shown in other illustration.

Many readers will be asking: *what tool are they taken from?* - the short answer is [KanbanZone](https://kanbanzone.com/partners/software-strategy/)¹

While there are many many similar tools available today, and many are better known, KanbanZone is my preferred tool. In my work I have created many different, weird and wonderful, board layouts. However, most tools are incapable of modelling anything more complex than column, column, column. KanbanZone is different in this matter, hence it is the one I recommend.

Using this [KanbanZone link](https://kanbanzone.com/partners/software-strategy/)² will get you a free account to try it for yourself.



¹<https://kanbanzone.com/partners/software-strategy/>

²<https://kanbanzone.com/partners/software-strategy/>

About the author

Allan Kelly helps teams and companies become more effective and productive. Using modern management techniques - like agile, OKRs and product thinking - he boosts effectiveness and connects product strategy to delivery.

He has written multiple books including the best selling “Succeeding with OKRs in Agile” plus “The Art of Agile Product Ownership” and “Business Patterns for Software Developers”.

Allan has advised, trained and coached teams at many small innovative companies as well as bigger, better known, companies such as Reed-Elsevier, Virgin Atlantic and the Swift payments network.

Links

You can contact Allan on e-mail, allan@allankelly.net, check out his [website and blog](https://www.allankelly.net/), <https://www.allankelly.net/>³ or connect on [LinkedIn](https://www.linkedin.com/in/allankellynet/), <https://www.linkedin.com/in/allankellynet/>⁴.

Allan is the founder of [Software Strategy](https://softwarestrategy.co.uk/), <https://softwarestrategy.co.uk/>⁵, where you will find details of his commercial services.

Also by Allan Kelly

*[Succeeding with OKRs in Agile](#)*⁶, Second edition, Software Strategy/LeanPub, 2023

³<https://www.allankelly.net/>

⁴<https://www.linkedin.com/in/allankellynet/>

⁵<https://softwarestrategy.co.uk/>

⁶<https://amzn.to/3r9Uxxh>

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¹¹<https://amzn.to/2P6VB1K>

¹²<https://amzn.to/3sj0b0c>

¹³<https://amzn.to/3mRwZXr>

¹⁴<https://amzn.to/3sfinI5>