



Use Lean Principles to Clean up your Task Management Tool

Software development programs have more task management tool options than ever before, and most have the same basic capabilities required to manage the development work. Which tool a program chooses is less important than how those tools are used and maintained. Your task management tool is a lot like a garage. Keep adding things without organization and the space eventually looks like an episode of Hoarders, becoming completely unusable and causing anxiety. The same can be true for your program's task management tool, and teams end up living in a digital version of a cluttered garage.

If this describes the current state of your program's tool, try looking in to the tried and true lean manufacturing principle of the 5 C's. Typically applied to warehouses and metal shops, the concepts in the 5 C's can be just as valuable to your development program. Taking the time to clean and organize your space will increase throughput and reduce the waste associated with living in chaos.

Clear Out

The first step in the 5 C's is clearing out the trash. For a software program, this means duplicates, old requirements, and ideas which never gained support. To start, create a query for all the active items in your tool, and then filter everything created more than 12 months ago. If it was created more than a year ago, you're probably not going to do it...so delete it. It will come up again as a requirement if it's important and will probably need to be rewritten anyway. If you are really ambitious, run the query again for items created more than 6 months and do the same thing.

Configure

The next step is a review how your system is configured. Review and update your workflow processes and make sure they align with your program's goals. Each development team should have their own space and workflow states which make sense for both the teams and the larger program. How are new ideas considered in your program and does your tool configuration support the process? What is the process for removing items which are no longer on the roadmap?

This step is also where a program should review their work item standardization. Does your program have a clear definition of ready and definition of done? What are the minimum requirements for an item to be loaded in a tool? If you are missing these standards, now is a good time to capture them.

Clean and Check

In manufacturing, this step refers to doing a deep clean of the workspace and associated machines. In your task management tool, this is a second pass at reviewing the items after you've ensured it's configured correctly. Run a new query and sort by the different workflow states to clean any out of place items. It's also another opportunity to delete duplicates, old requirements, and customer problems your program decided not to solve. In addition, run a query based on your minimum tool requirements and identify those items which don't meet the standard. Bringing your tool to a clean state, with everything in the right spot, is the equivalent of a clean machine on the manufacturing floor.



Conformity

During the Conformity step you should develop a standardized way of maintaining a clean tool. For example, you should create standing queries of items which don't meet the minimum requirements so they can be updated quickly. An even better option is to configure your tool so new work items can't be added without the minimum required fields. You should also add a process step when closing a Sprint or Program Increment to review open items and ensure they are still needed. Formalizing small habits to organize your tool will prevent the need to go through the same exercise 12 months in the future.

Custom and Practice

The final step is about ensuring the first 4 steps become part of the program culture. The goal is to maintain and improve the future state of your newly clean task management tool. Consider making the maintenance of your tool a visible metric for the teams. You could create a monthly roll-up of items older than 12 months and show the trend from month to month. Another useful metric to gather trend information is the average age of items in your task management tool. The more ownership you can build within your program, the more likely they'll help to keep your tool continually clean.

Working efficiently without organization is challenging for any team. This applies to both the physical work of manufacturing and the digital world of software development. If your software development program is wasting time wading through the clutter of old requirements, take a page from Lean Manufacturing and run a 5 C's exercise on your task management tool. Your team will thank you...hope it helps!