

Kanban for daily life

Implemented in kanbanflow.com

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Introduction

In 2017 I was struggling to organize my life, specially in the work area, because I had became a Tech Lead and had more responsibilities than before and I felt totally not ready for it since I had drop the ball a few times which lead me to believe I was not prepared for the challenge, but I decided that I will not give up without trying and the book Personal Kanban by Jim Benson was suggested in Kindle almost like magic (Amazon reading my mind?) and that is when this story begins.

I read the book in a few days and I started applying everything it recommended without questioning any of it.

The first step was to decide which tool I wanted to use and I decided from all the options, that the best one was "kanbanflow.com".

The second step was to familiarize myself with the board, setup the columns, categories and get the first few tasks in the framework, which had been living in Evernote for about 6 years.

Last step, move the first 3 tasks and start working and move the first task to the Done column, yes! This felt so good. My first day was a success and I was really happy.

The next day was not that easy because a problem demanded that I drop everything I was working on and fix that problem, which made me forget the board completely and start tackling problems in the way they come or depending on who was screaming the loudest. Half way through fixing the problem I remembered my board, stopped what I was doing and made a brain dump to make the board reflect what I was working on and most importantly in what order. Next thing you know, I am done fixing the problem, I was very efficient in my use of time and when I got back to review my board I picked up where I left the day before, without frustration or wasting time.

Since that day in 2017 I had been using the board and made a lot of modifications that help me to level up my game constantly and by teaching this method to other people I know what things really make a difference.

Now I want to document my learnings and benefit other people that might be struggling like I was, thinking that they are the problem when in reality they are just a few pages away from the solution to a happier and healthier way of working.

Let's start with the most basic board

I will walk you through the setup of your first board in “kanbanflow.com”:

1. Create the board:

Create board

General settings

Board name

Next

2. Setup only these 3 columns:

Create board

Columns

To-do

Remove

In progress

Remove

Done

Remove

Add column

Previous

Next

3. Set Work In Progress (WIP) limit:

Create board

Limit Work in Progress (WIP)

Limit how many tasks you are allowed to have in a certain column. That will help you finish existing tasks instead of starting new tasks.

Reducing multi-tasking will make you **more focused** and give you a **better flow**.

To-do

In progress

Done

[Previous](#) [Next](#)

4. Now you have your first board and it should look like this:

To-do	+	In progress 0 / 3	+	Done	+
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Now it's time to start

You will dump everything that is in your mind right now onto the first column, because like David Allen said: your brain is for having ideas, not storing them.

Let me repeat because you are still reading... Now is the time to stop reading and write down every task that you have in your mind, post it, notepad, every source and centralize it all here, go I will wait....

Good job! Does it feel better? I know it does and don't hesitate to stop reading to write more things in the todo column because now that you have buffer more and more will come, it's your brain catching up.

The next step is to identify categories for your tasks, here is mine to give you a starting point:

- Personal
- My team
- Other teams
- Urgent

Once you have the list go to Menu -> Settings -> Colors

General
Layout
Colors
Task settings
Advanced

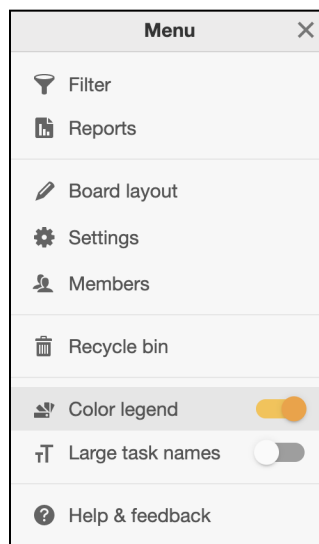
The colors are commonly used to indicate the type or priority of a task. You can have up to 10 colors. [Show more...](#)

Enabled colors Set default color

Color	Name	Actions
Yellow	Yellow (Default)	Edit Disable ↓ ↑
Green	Green	Edit Disable ↓ ↑
Blue	Blue	Edit Disable ↓ ↑
Red	Red	Edit Disable ↓ ↑
Orange	Orange	Edit Disable ↓ ↑
Purple	Purple	Edit Disable ↓ ↑
Magenta	Magenta	Edit Disable ↓ ↑
Cyan	Cyan	Edit Disable ↓ ↑

And assign a color to each category. Make sure the default color is the one you use the most, in my case it is “My Team”.

To show the color labels, go again to Menu -> Color legend



Go back to your board, right click each task and assign a color.

Note: from time to time you should review the categories and see if you need to add or remove one.

After this exercise you should have a nice list of tasks with 4 or 5 colors, I would not recommend having more than that because it could get confusing.

Prioritizing

Now you should drag and drop from top to bottom where the top is the most important task of the day and the bottom is the least urgent.

Time to start working

Grab the first task, move it to the Doing column and get to it!

Tip: if the task is something big, you should first breakdown the steps you are going to take to tackle it, if it takes more than 1 hour each step, you should create more tasks for each step and add them to the todo column.

Are you done? Move the task to the Done column and feel that sense of accomplishment fill you up with more energy to tackle the next task!

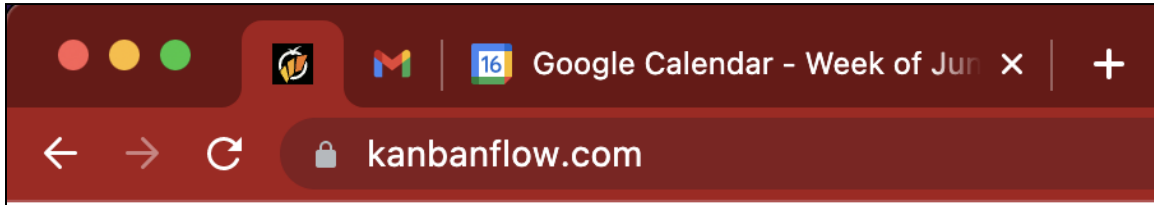
Are we done?

No, we are just getting started! Now you have the board, the categories, the growing list of things you need to work on with the clear prioritization and a visual representation of the progress, also knowing exactly what you should be working on now. Next you will learn how to keep using the board throughout the day, manage deadlines, multitasking, learn more features and lastly I will show you the version 2 of the board with more columns to account for the complexities of today's work environment, but don't jump straight to it because you will bite more than you can chew right now.

How to make it stick

The first problem you are going to face is that you will forget to enter the tasks into the board or you are going to say “it’s going to take me more time to write it down, than to actually do it”, the problem with this is 2 fold, first you will end up doing things that are not a priority right now and you will lose track of something that you accomplished, so don’t give into the temptation, just enter every task in the system, no matter how small it is.

One way I was able to avoid the “I forgot” problem was by making the browser “tab” of the board the first one and **pin** it:



Now I can use the keyboard shortcut: “Command + 1” (Windows: Ctrl + 1) to jump to my board and I also made the habit of checking my board when I am trying to remember what I was doing after a distraction (which happens very often to tell you the truth).

The Pilot, the Plane and the Engineer

Ali Abdaal (Doctor, Youtuber and Productivity expert) came up with a system that he calls “The Pilot, the Plane and the Engineer” that goes like this:

Let’s look at the responsibilities of each one:

- The Pilot is responsible for setting the course of the plane, the take off and landing.
- The Plane is responsible for getting us to where we want to go.
- The Engineer is responsible for keeping the plane working as efficiently as possible with scheduled maintenance tasks.

I really like this analogy because this gives us a clear way to explain how we should organize our work.

First the Pilot: this is the most difficult job, because he has to tell us where we will go and how to get there, by defining daily what are the 3 or 4 tasks we should work on, then open each task and do a checklist of things you need to accomplish, because having this clarity will reduce the friction in your mind that comes when a task is too big. Now that you have the most important tasks of the day and they have a clear checklist, you should take off the plane by starting a task (the hardest part of any activity is the start)¹.

Second is the Plane: once you are already flying (working on a task) and you have a clear roadmap, you should focus on making steady progress by working on the tasks the Pilot defined and by being mindful of ignoring distractions from things that are not important or urgent.

Lastly is the Engineers turn: you should do a weekly review of the things you are working on, what are your long and medium term goals, review your framework to see if you need to adjust anything. You should dedicate at least 1 hour of uninterrupted thought just for this.

By using this framework, you can use the beginning of your day to do the Pilots work first, because it is the mindset that requires most of the brain power and focus.

¹https://www.youtube.com/watch?v=m3ZKduijMk8&ab_channel=ProductivityGame

Multitasking

Scientific studies tell us that we can't multitask as good as we think we can, so according to Jim Benson we should set a limit to how many tasks we work at the same time and that magic number is 3. This comes as the default value in the "In progress" column, so there is nothing you should change, but you could change it if you see fit.



The way you are going to approach this is by working on one at a time and when you need to wait for a response or give something a break, you will switch context and work on another task, but remember that every time that context switch happens it will take you between 10 to 15 minutes to reach flow state².

If you notice a task that is "stuck" in Progress without making any progress you should move it back to To-do but add a note to it explaining what you are waiting for, in order to make progress again.

²

<https://medium.com/personal-growth-lab/how-to-reach-flow-state-using-10-flow-state-triggers-473aa28dc3e5>

My version of the Personal Kanban

Since I had been using this system for a few years and I usually adapt frameworks to fit my needs or because I am bored of it, I came up with some changes to it that helped me a lot to make the most out of it and I will like to share those improvements because I believe everyone would find them necessary.

Future

First I started to notice that some tasks were never prioritized, because there were things that I wanted to do in the future, probably good ideas, but that I just didn't have time for them right now, but having them in my To-Do Column and reviewing them daily would make me feel that I was not making progress and I was lazy, thankfully I have the Done Column to prove me wrong. After having this internal fight daily I decided that I should create a Future Column, move all the tasks that I was not ready to work on this month, move it to the left side and then click on the column name to make it collapse (very useful feature):

0	To-do	+	In progress 0 / 3	+	Done	+
FUTURE						

But it's very important that at least once a month I will open the future column and review if I needed to pull something from it.

Next in line

Another pattern that I started to see was that I didn't have a clear goal for the day, a visible progress bar if you will, because even if I prioritize my To-do Column and after finishing the 3 or 4 most important tasks of the day I still felt overwhelmed by the number of tasks left in my To-do column, so I decided that I will create another column that would hold all the tasks of the day and once that column was empty I will feel accomplished and only after recognizing my progress I will pull more things to do in the same day, but knowing that was an extra.

The other benefit was that, the days I was not able to finish all my tasks for the day, the next day I knew what was the most important task and I would be laser focused on not letting that task escape another day. I called this column "Next in line":

0	To-do	+	Next in line	+	In progress 0 / 3	+	Done	+
FUTURE								

Waiting for

Since we work in an interdependent environment, there are so many tasks that I can't accomplish alone or that I need someone else to review or help, which let me to have tasks bouncing from "In progress" to "Next in line" just because I was waiting for that email or meeting

to happen. Having the “Waiting for” column give me that space to hold someone else accountable, because I will write a note in the task that I move here to be very specific about what or who I was waiting for to be able to close my task.

An important note about this column is that I had to be careful not to over populate it with tasks, because if you have more than 4 tasks waiting for something, you are better off reaching out to people or scheduling the meetings to make progress happen, since they will start to clutter your focus.

0	To-do	+	Next in line	+	In progress 0 / 3	+	Waiting for	+	Done	+
FUTURE										

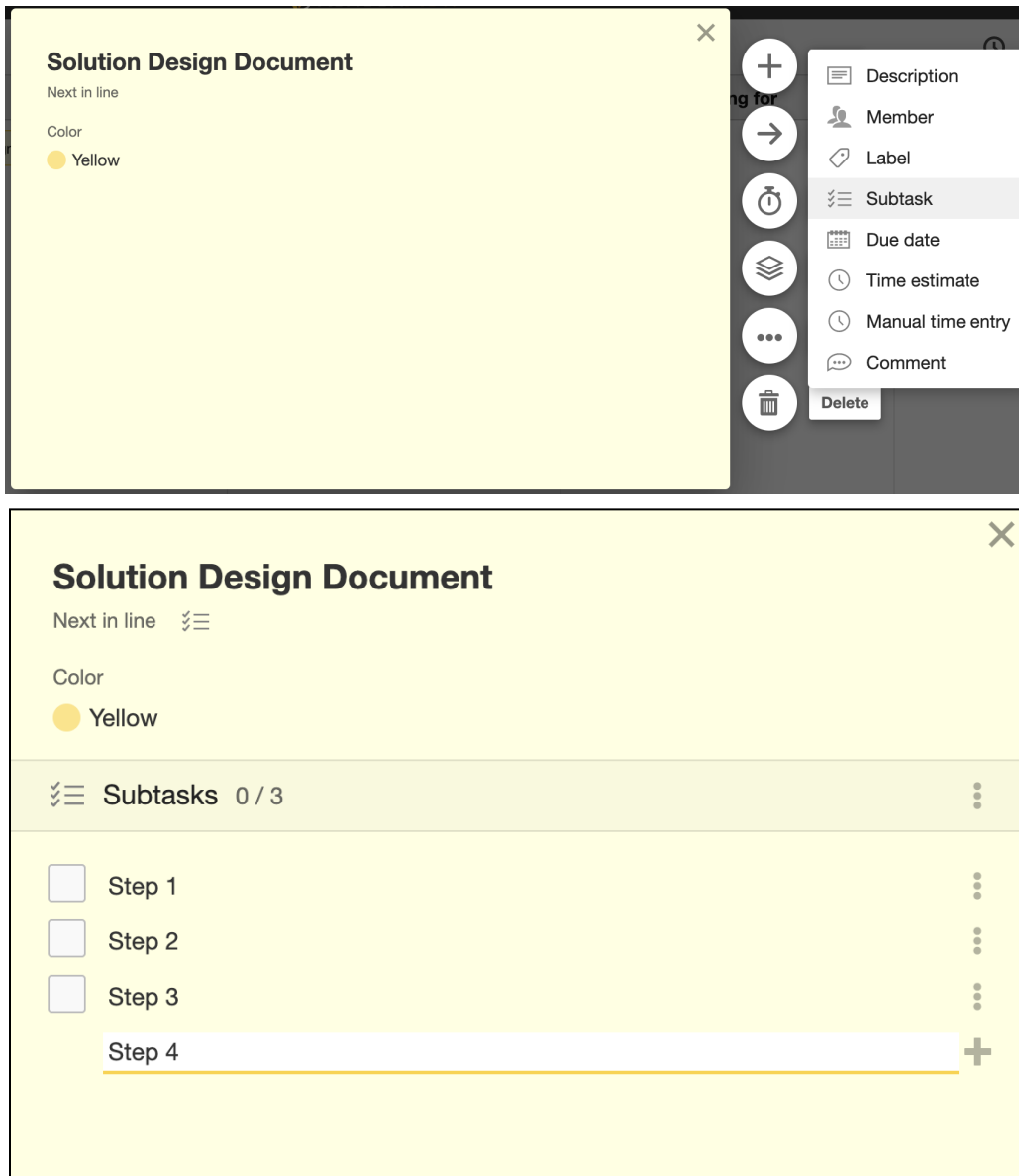
This is the final column of the dashboard, I suggest you give it a try for a week and see which columns actually make sense to you and which ones you need to change, add or remove to better reflect your workflow, this should not be a static system, it should evolve with you.

Next I will explain some features of kanbanflow.com that I find essential to my frame.

Essential Features

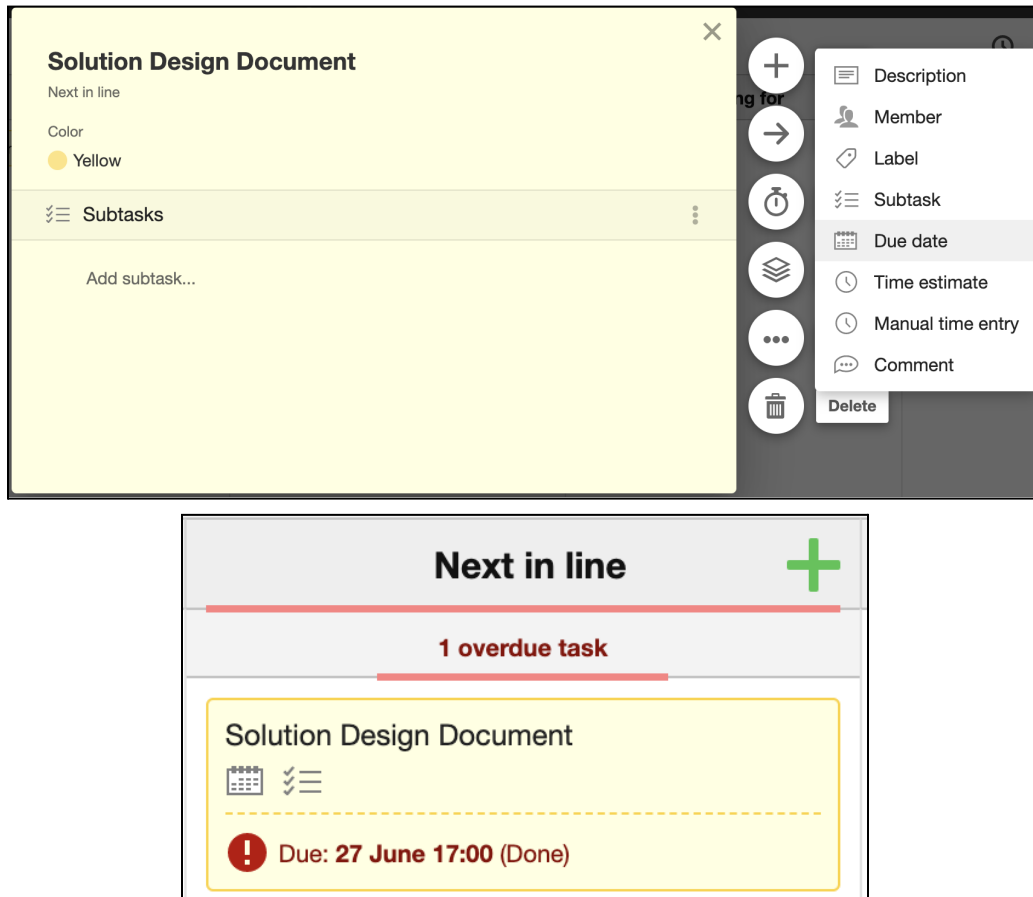
Subtaks

For any task that it's not atomic enough, you should have a Subtask or checklist of things you need to do in order to consider this task complete. This is the responsibility of the Pilot and it's probably the single action that will give you the clarity you need when something feels overwhelming.



Due Date

If there are tasks that you are creating very far away from the deadline, you should use this feature because it will give you a visual reminder that the date it's approaching. Something I like to do is to make the deadline a few days before the real one, because if a task gets past the Due Date, I will be reminded of it.



Why do most people fail to implement any productivity framework?

Consistency is the biggest problem we all face, because let's be real, how many people actually want to track everything they are working on, prioritize and move the tasks from one column to the other, right? This is a common fallacy, we see only that it takes a lot of time and effort to keep the system up to date and sometimes is just faster to complete a task, rather than enter it in the board, put it in the right column, the category and then finally starting to work on it, but this is where we get lost in doing stuff instead of doing what is the “next most important task” because our monkey brain will make you believe that it already knows what is in each column and that this task is really the most important thing you should be working on right now. I can't tell you how many times I was wrong and ended up doing something that kept me busy but didn't move the needle on the important projects I was working on, and at the end of the day I wonder where my time went and why I made no progress.

Conclusion

Winston Churchill once said, “We shape our tools and then the tools shape us” this quote made me super aware about the tools and processes I use in my daily life because they will shape how I think and operate and ultimately determine if I succeed, enjoy or fail in my endeavors. I hope you get some value from this short piece, if you are interested in other ways you can work more efficiently or if you would like to reach out you could find me at:

<https://ezequielmoglia.com>

Until next time.

Thank you