Simplification Tool

Killing Complexity

Simplification Process:
1. Awareness
2. Identification
3. Prioritization
4. Execution
5. Habit Formation
WHY THIS TOOL?
Do you spend your time working on high- or low-value tasks? Are those tasks simple or complex? Whether you’re designing an IT system or compiling status reports, this tool will help you identify how you spend your time, determine the value and complexity of those tasks, and how to simplify or eliminate low-value work.

HOW IT WORKS

SUGGESTED AUDIENCE:
• Relevant for all levels of staff

SET-UP:
• This tool can be done individually or as a group
• If done as a group:
  • Include as many team members as possible from your business unit for a variety of perspectives
  • One week before meeting, send participants the Task Worksheet for identification of typical workday tasks
  • Hold your session in a room with whiteboards or enough wall space to accommodate 2 flip charts

RECOMMENDED TIMING:
Step 1. List your current tasks: 10 mins.
Step 2. Assign a time to each task: 5 mins.
Step 3. Assign value to each task: 5 mins.
Step 5. Plot tasks on matrix + discuss: 5 - 30 mins.
55 - 95 mins.

SUGGESTED MATERIALS:
Worksheets
( emailed to each participant, plus hard-copy extras)

Colored whiteboard markers and pens (separating ideas by color will help organize your thoughts)

Whiteboard or flipcharts
(pre-draw the Complexity Scale and Value Matrix)

Plenty of sticky notes if conducting exercise as a group
(10 notes per participant, plus a few extra)
STEP 1: LIST YOUR CURRENT TASKS

In Column #1 of the Task Worksheet below, list each task on which you spend your time. Include daily, weekly, or monthly activities.

TIPS FOR SUCCESS:
- Break large tasks down into separate steps or components. This will help identify which aspects of a particular task don’t provide enough value to justify the time investment.
- If the task is large-scale (e.g., ‘brain surgery’), it might require its own task worksheet.
- Some items on your list may be tasks you’re in charge of, and some may be activities in which you attend/participate/play a role. Be specific about your role in that task (e.g., ‘run weekly staff meeting,’ not ‘meetings’).

<table>
<thead>
<tr>
<th>STEP 1 Current Tasks</th>
<th>STEP 2 Time</th>
<th>STEP 3 Value</th>
<th>STEP 4 Define Task Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Attend weekly status meeting</td>
<td>3</td>
<td>2</td>
<td>People repeat the same info every week</td>
</tr>
</tbody>
</table>
STEP 2: ASSIGN A TIME TO EACH TASK

Review the descriptions below and in Column #2 of the Task Worksheet, place the number that best describes the amount of time you typically spend on each task.

TIP FOR SUCCESS: If timing for the task varies, choose a number that represents the average time you spend (i.e., are most weekly status meetings a 2?).

- **1** SIGNIFICANT TIME TO COMPLETE
  - Extremely difficult or cumbersome
  - Many people, steps, layers, approvals, decisions

- **2** SOME TIME TO COMPLETE
  - Difficult
  - Involves people, steps, layers, approvals, decisions

- **3** LITTLE TIME TO COMPLETE
  - Relatively easy, fast
  - Few people, steps, layers, approvals, decisions

- **4** NO TIME TO COMPLETE
  - Very easy, fast, concise
  - Few or no people, steps, layers, approvals, decisions

STEP 3: ASSIGN VALUE TO EACH TASK

Review the descriptions below and in Column #3 of the Task Worksheet, choose a number that best describes the approximate value each task provides for the business.

- **1** NO VALUE
  - Distracts from achieving goals
  - Serves no clear business purpose
  - Creates problems/get in the way
  - Redundant or unnecessary

- **2** LITTLE VALUE
  - Doesn’t help achieve goals
  - Indirectly supports the business
  - Time could be used better

- **3** SOMEWHAT VALUABLE
  - Helps meet your goals, although not always directly
  - Helps drives business forward
  - Contributes to solutions
  - Adds some revenue
  - Good use of time

- **4** VERY VALUABLE
  - Important for achieving your goals
  - Directly contributes to driving business forward
  - Creates new solutions
  - Adds revenue
  - Serves a strategic purpose
  - Facilitates others’ success
  - Important use of time

STEP 4: DEFINE TASK PROBLEMS

Refer back to your Task Worksheet. Next to each of your tasks in Column #4, identify which aspects of each task waste time and/or make the task less valuable.
STEP 5: PLOT TASKS ON MATRIX + DISCUSS

Using your scores from the Task Worksheet, plot your tasks on the Time vs. Value Matrix below. Each task must be placed in a specific quadrant. If conducting this exercise as a group, re-create the matrix on a flip chart or whiteboard and instruct participants to write tasks on sticky notes and plot them on a shared matrix.

- **Q1** – These are low-value tasks that should be ELIMINATED.
- **Q2** – Decide whether the value of these tasks should be re-evaluated. If not, consider eliminating them based on their low value.
- **Q3** – Consider how these tasks could be simplified.
- **Q4** – These tasks are valuable best practices and represent what all of our tasks should aspire to.

**Discuss:**
- What kinds of tasks are represented in each quadrant (i.e. reporting, presentations, etc.)? Are there common themes?
- Is the majority of your/our time being spent on tasks that are valuable? If not, why?
- If doing this exercise as a group, ask participants if any identical tasks received varying levels of time or value from different team members? If so, this may indicate varying experience levels, and present an opportunity for training or consolidation of the task to fewer people.

★ Look at the top right quadrant: can these high-value tasks be improved upon? If so, outline your approach to simplifying these tasks in STEP 6.

X Look at the lower left quadrant: what’s stopping you from eliminating these tasks from your life? Outline your approach to simplifying these tasks in STEP 6

? Look at the bottom right: what can you modify to make these tasks more valuable? Outline your approach to simplifying these tasks in STEP 6.

✓ Look at the top left quadrant: can you streamline or improve these tasks to lessen their complexity and time investment? Outline your approach to simplifying these tasks in STEP 6.
STEP 6: GENERATE SOLUTIONS + DISCUSS

Based on your answers to the discussion questions in STEP 5, use the table below to simplify your tasks. Tasks that appear in Q1-Q3 of the matrix should be priority.

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<tr>
<th>Task</th>
<th>Approach</th>
<th>Next Steps + Solutions</th>
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<tbody>
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<td></td>
<td>Eliminate</td>
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<td></td>
<td>Outsource</td>
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If conducting this exercise as a group, discuss:

- What was the most common approach to our solutions: eliminate, outsource, or streamline? Why do we think that is?
- Which solutions can we act on immediately?
- Which solutions involve other people/approvals to act upon?
- Which solutions should we pilot to see if they work?
- Which solutions should we prioritize to move forward on?