

Five Steps to Defeat Dependencies

In just one week!



Day 1: Make your work visible

The screenshot displays a Kanban board titled "Personal Agility Templates Demo PAS Sales Flow™ Board". The board is organized into columns representing different stages of the sales process:

- Leads (6):** Contains a card titled "What Really Matters" with instructions to update cards based on key factors like Beta, OKRs, or priorities.
- Sales Process (15):**
 - Consultation Call (4):** Includes a card for starting the ball rolling with an objective to decide on registration and a card for "Other Follow-Up required" with entry criteria for providing information.
 - Scheduled / Waiting for Call (2):** A card with entry criteria for scheduled calls and exit criteria for waiting and identifying needs.
- Strategy Call (4):** Includes a card for requesting a quote with entry criteria for scheduled calls and a card for "Other Follow-Up required".
- Quote (3):** Includes a card for writing a quote with entry criteria for requests and compelling business cases.
- Ordered (4):**
 - Set Up Project (2):** A card for starting work.
 - Awaiting Order (2):** A card with entry criteria for quote and deadline, and exit criteria.
- Completed (1):** A card labeled "Success" with a progress indicator.

- Use real or virtual cards/sticky notes.
- You can start by yourself
- You don't need to convince anyone else to start improving.

Day 1: Make your work visible

Each Step in the Process

The screenshot displays a Kanban board titled "Personal Agility Templates Demo PAS Sales Flow™ Board". The board is organized into columns representing different stages of the sales process. Each column has a title and a count of items. Red arrows point from the text "Each Step in the Process" to the column headers.

- What Really Matters** (6 items): A side panel with instructions: "Update these cards an the corresponding label match your key Betb, OKRs, or other priorities." It includes a "Leads" section with a count of 2.
- Sales Process** (15 items): The main workflow area, divided into columns:
 - Consultation Call** (4 items): Includes "Start the ball rolling" and "Objective" (Decide to register for course, or). A sub-section "Other Follow-Up required" (2 items) has "Entry Criteria" (Provide info requested in Consultation call). A sub-section "Scheduled / Waiting for Call" (2 items) has "Entry Criteria" (Call has been scheduled, Waiting for the date) and "Exit Criteria" (Identify Need).
 - Strategy Call** (4 items): Includes "Leads to a request for quote" and "Entry Criteria" (Call scheduled). A sub-section "Other Follow-Up required" (2 items) is present. A sub-section "Scheduled / Waiting for Call" (2 items) has "Entry Criteria" (Call Scheduled) and "Exit Criteria" (Call has been held).
 - Quote** (3 items): Includes "Leads to an order" and "Entry Criteria" (Compelling Business Case Identified). A sub-section "Write Quote" (3 items) has "Leads to an order" and "Entry Criteria" (Request for Quote, Compelling Business Case).
 - Ordered** (4 items): Includes "Start work" and "Set Up Project" (2 items). A sub-section "Awaiting Order" (2 items) has "Entry Criteria" (Quote Sent, Deadline Set to Offer Validity) and "Exit Criteria".
- Completed** (1 item): A final column with a "Success" card (171 items).

- use real or virtual cards/sticky notes.
- Have a column for each step on the way to "done."

Day 1: Make your work visible

The screenshot shows a Kanban board titled "Personal Agility Templates Demo PAS Sales Flow™ Board". The board is organized into columns representing stages of a sales process: "Leads" (6 items), "Sales Process" (15 items), and "Completed" (1 item). The "Sales Process" column is further divided into sub-columns: "Consultation Call" (4 items), "Strategy Call" (4 items), "Quote" (3 items), "Ordered" (4 items), and "Success" (1 item). Each card on the board contains details such as "Start the ball rolling", "Objective", "Entry Criteria", and "Exit Criteria".

Handwritten red annotations highlight specific areas of the board:

- A red bracket on the left side of the "Sales Process" column encompasses the "Other Follow-Up required" and "Scheduled / Waiting for Call" cards. A red box next to this bracket contains the text "Stuff you can work on".
- Another red bracket on the left side encompasses the "Scheduled / Waiting for Call" card. A red box next to this bracket contains the text "Stuff you are waiting on".

- Use real or virtual cards/sticky notes.
- Have a column for each step on the way to "done."
- Make it clear what you can work on and what is waiting

Day 1: Make your work visible

Personal Agility Templates
Demo PAS Sales Flow™ Board

6

What Really Matters

Update these cards on the corresponding label match your key Bet's, OKRs, or other priorities.

Leads

2

2

Other Follow-Up required

Entry Criteria

- Provide info requested in Consultation call

156

157

2

Scheduled / Waiting for Call

Entry Criteria

- Call has been scheduled
- Waiting for the date

Exit Criteria

- Identify Need

158

159

15

Sales Process

4

Consultation Call

Start the ball rolling

Objective

- Decide to register for course, or

2

Other Follow-Up required

160

161

2

Scheduled / Waiting for Call

Entry Criteria

- Call Scheduled

Exit Criteria

- Call has been held

162

163

4

Strategy Call

Leads to a request for quote

Entry Criteria

- Call scheduled

3

Quote

Leads to an order

Entry Criteria

- Compelling Business Case Identified

3

Write Quote

Leads to an order

Entry Criteria

- Request for Quote
- Compelling Business Case

164

165

166

4

Ordered

Start work

2

Set Up Project

167

168

2

Awaiting Order

Entry Criteria

- Quote Sent
- Deadline Set to Offer Validity

Exit Criteria

169

170

1

Completed

Success

171

- Use real or virtual cards/sticky notes.
- Have a column for each step on the way to "done."
- Make it clear what you can work on and what is waiting
- Create a card for each item in your pipeline

Day 2: Be clear on your priorities

The screenshot displays a Kanban board for a sales process. The board is organized into columns representing different stages of the sales process, with a 'Leads' column on the far left. The stages and their respective cards are:

- Leads (6 cards):** A vertical column on the left containing cards for 'What Really Matters' (146), 'Top Priority Bet' (149), 'No 2 Priority Bet' (150), 'No 3 Priority Bet' (151), 'No 4 Priority Bet' (152), 'No 5 Priority Bet' (153), and 'Lower Priority Bets' (153).
- Consultation Call (4 cards):** Includes 'Start the ball rolling' (Objective: Decide to register for course, or), 'Other Follow-Up required' (Entry Criteria: Provide info requested in Consultation call), and 'Scheduled / Waiting for Call' (Entry Criteria: Call has been scheduled, Waiting for the date; Exit Criteria: Identify Need).
- Strategy Call (4 cards):** Includes 'Leads to a request for quote' (Entry Criteria: Call scheduled), 'Other Follow-Up required' (Cards 160, 161, 164, 165, 166), and 'Scheduled / Waiting for Call' (Entry Criteria: Call Scheduled; Exit Criteria: Call has been held).
- Quote (3 cards):** Includes 'Leads to an order' (Entry Criteria: Compelling Business Case Identified), 'Write Quote' (Leads to an order; Entry Criteria: Request for Quote, Compelling Business Case), and 'Scheduled / Waiting for Call' (Cards 160, 166).
- Ordered (4 cards):** Includes 'Start work' (Cards 167, 168), 'Set Up Project' (Cards 167, 168), 'Awaiting Order' (Entry Criteria: Quote Sent, Deadline Set to Offer Validity; Exit Criteria: Cards 169, 170).
- Completed (1 card):** A 'Success' column with card 171.

A red bracket on the left side of the board encompasses the 'Leads' column and the 'Consultation Call' and 'Strategy Call' columns. A red text label 'Your overarching priorities' is placed over this bracketed area.

- Identify what really matters
- May come from OKRs, MBO's, Personal Goals, etc.

Day 2: Be clear on your priorities

The screenshot displays a Kanban board titled "Personal Agility Templates Demo PAS Sales Flow™ Board". The board is organized into columns representing different stages of a sales process, with a "Leads" column on the far left and a "Completed" column on the far right. Each column contains several cards representing tasks or leads, color-coded by priority or status. The cards are numbered and include details such as "Entry Criteria" and "Exit Criteria".

- Leads (6 cards):** "What Really Matters" (146, 149, 150, 151, 152, 153) with instructions to update cards based on priority labels.
- Sales Process (15 cards):**
 - Consultation Call (4 cards):** "Start the ball rolling" (Objective: Decide to register for course, or), "Other Follow-Up required" (Entry Criteria: Provide info requested in Consultation call).
 - Strategy Call (4 cards):** "Leads to a request for quote" (Entry Criteria: Call scheduled), "Other Follow-Up required" (Cards 160, 161).
 - Quote (3 cards):** "Leads to an order" (Entry Criteria: Compelling Business Case Identified), "Write Quote" (Leads to an order, Entry Criteria: Request for Quote, Compelling Business Case).
 - Ordered (4 cards):** "Start work" (Set Up Project: Cards 167, 168), "Awaiting Order" (Entry Criteria: Quote Sent, Deadline Set to Offer Validity), "Exit Criteria" (Cards 169, 170).
- Completed (1 card):** "Success" (Card 171).

- Identify what really matters
- Connect your tasks with your priorities

Day 2: Be clear on your priorities

The screenshot shows a Kanban board with columns for 'Leads', 'Sales Process', and 'Completed'. The 'Leads' column has 6 items, 'Sales Process' has 15 items, and 'Completed' has 1 item. The 'Sales Process' column is divided into sub-columns: 'Consultation Call' (4 items), 'Strategy Call' (4 items), 'Quote' (3 items), 'Ordered' (4 items), and 'Success' (1 item). Handwritten red text 'Move these to the top' is placed over the board, with red arrows pointing to items 166 and 163 in the 'Quote' column, and item 171 in the 'Completed' column.

Personal Agility Templates
Demo PAS Sales Flow™ Board

Leads 6

What Really Matters
Update these cards on the corresponding label match your key Bets, OKRs, or other priorities.

- 146 Top Priority Bet
- 149 No 2 Priority Bet
- 150 No 3 Priority Bet
- 151 No 4 Priority Bet
- 152 No 5 Priority Bet
- 153 Lower Priority Bets

Sales Process 15

Consultation Call 4
Start the ball rolling
Objective
• Decide to register for course, or

Other Follow-Up required
Entry Criteria
• Provide info requested in Consultation call

Scheduled / Waiting for Call 2
Entry Criteria
• Call has been scheduled
• Waiting for the date
Exit Criteria
• Identify Need

Strategy Call 4
Leads to a request for quote
Entry Criteria
• Call scheduled

Other Follow-Up required
160
161

Scheduled / Waiting for Call 2
Entry Criteria
• Call has been scheduled
• Waiting for the date
Exit Criteria
• Call has been held

Quote 3
Leads to an order
Entry Criteria
• Compelling Business Case Identified

Write Quote
Leads to an order
Entry Criteria
• Request for Quote
• Compelling Business Case

164
165
166

Ordered 4
Start work

Set Up Project
167
168

Awaiting Order 2
Entry Criteria
• Deadline Set to Offer Validity
Exit Criteria

Completed 1
Success
171

Move these to the top

- Identify what really matters
- Connect your tasks with your priorities
- Sort items by priority within each column
 - Why should a low priority item wait on a higher priority item?

Day 2: Be clear on your priorities

The screenshot shows a Kanban board titled "Personal Agility Templates Demo PAS Sales Flow™ Board". The board is organized into columns representing different stages of the sales process:

- What Really Matters** (6 items): Cards are color-coded by priority (purple for top, yellow for no, green for no, brown for lower).
- Sales Process** (15 items):
 - Consultation Call** (4 items): Includes "Other Follow-Up required" and "Scheduled / Waiting for Call".
 - Strategy Call** (4 items): Includes "Scheduled / Waiting for Call".
 - Quote** (3 items): Includes "Set Up Project".
 - Ordered** (4 items): Includes "Set Up Project" and "Awaiting Order".
 - Completed** (1 item): A purple card labeled "Success".

A red arrow points from a card in the "Ordered" column to a card in the "Completed" column. The text "This is the goal" is written in red over the "Ordered" column.

- Identify what really matters
- Connect your tasks with your priorities
- Sort items by priority within each column
- Finishing is usually more important than starting

Day 2: Be clear on your priorities

Personal Agility Templates
Demo PAS Sales Flow™ Board

6

What Really Matters

Update these cards on the corresponding label match your key Bets, OKRs, or other priorities.

- 148 Top Priority Bet
- 149 No 2 Priority Bet
- 150 No 3 Priority Bet
- 151 No 4 Priority Bet
- 152 No 5 Priority Bet
- 153 Lower Priority Bets

Leads

Sales Process

Consultation Call

Start the ball rolling

Objective
• Decide to register for course, or

Other Follow-Up required

Entry Criteria
• Provide info requested in Consultation call

- 154
- 157

Scheduled / Waiting for Call

Entry Criteria
• Call has been scheduled
• Waiting for the date

Exit Criteria
• Identify Need

- 158
- 159

Strategy Call

Leads to a request for quote

Entry Criteria
• Call scheduled

Other Follow-Up required

- 160
- 161

Scheduled / Waiting for Call

Entry Criteria
• Call Scheduled

Exit Criteria
• Call has been held

- 163
- 162

Quote

Leads to an order

Entry Criteria
• Compelling Business Case Identified

Write Quote

Leads to an order

Entry Criteria
• Request for Quote
• Compelling Business Case

- 166
- 164

Ordered

Start work

Set Up Project

- 167
- 168

Exit Criteria

- 169
- 170

Completed

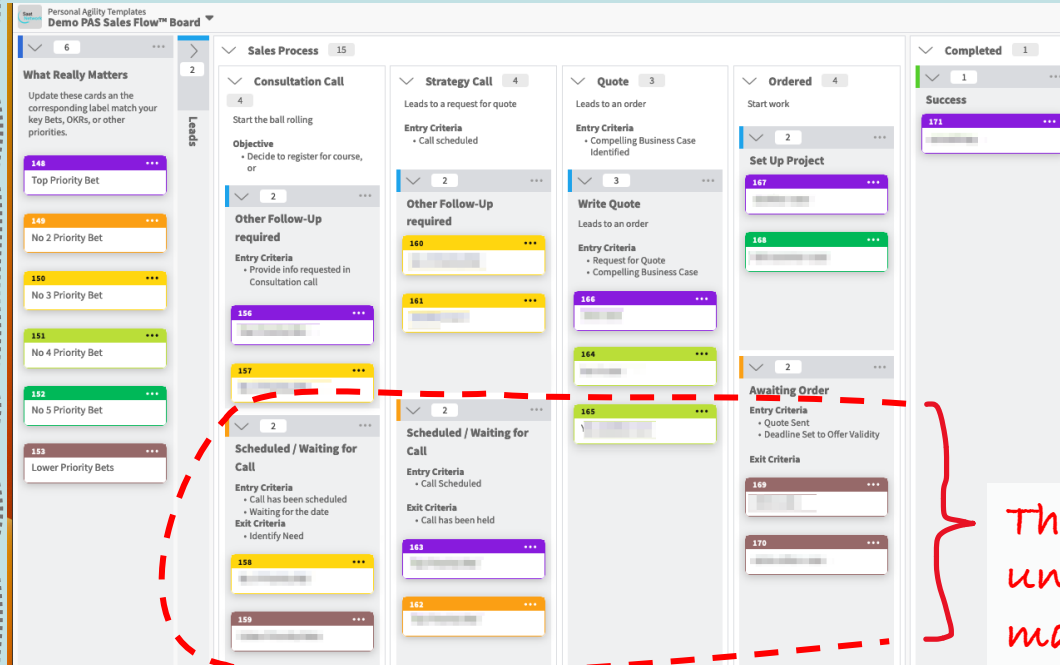
Success

- 171

So work on this one next

- Identify what really matters
- Connect your tasks with your priorities
- Sort items by priority within each column
- Finishing is usually more important than starting
- Work from the top right

Day 3: Ask yourself: Who can help?



- How can you better involve the individuals, teams, or companies to collaborate with you?

This part is usually not under your control, but may be subject to influence

Day 3: Ask yourself: Who can help?



- Dependencies are often about missing skills, knowledge, or authority.
 - How can you ensure your team has what it needs to move forward?
 - This may entail cross-team or even cross-company collaboration
 - This may entail delegating authority or tighter collaboration with management and stakeholders

Day 4: Clear dependencies before you start



- If you are waiting on a delivery, make that delivery a prerequisite to starting work
- Maybe an off-the-shelf or in-the-basement component is good enough to get started

Day 4: Clear dependencies before you start



- Maybe you can mock-up the expected behavior with a test suite or place holder.
- “The first iteration of the parking brake was a box to represent the space needed by the handle. Interior design could proceed.”

Day 5: Share your approach...

The screenshot displays a Kanban board titled "Personal Agility Templates Demo PAS Sales Flow™ Board". The board is organized into columns representing different stages of a sales process:

- What Really Matters** (6 cards): A vertical list of cards with priority levels: "Top Priority Bet" (148), "No 2 Priority Bet" (149), "No 3 Priority Bet" (150), "No 4 Priority Bet" (151), "No 5 Priority Bet" (152), and "Lower Priority Bets" (153).
- Sales Process** (15 cards):
 - Consultation Call** (4 cards): Includes "Start the ball rolling" (Objective: Decide to register for course, or) and "Other Follow-Up required" (Entry Criteria: Provide info requested in Consultation call).
 - Strategy Call** (4 cards): Includes "Leads to a request for quote" (Entry Criteria: Call scheduled) and "Other Follow-Up required" (Cards 160, 161).
 - Quote** (3 cards): Includes "Leads to an order" (Entry Criteria: Compelling Business Case Identified) and "Write Quote" (Leads to an order, Entry Criteria: Request for Quote, Compelling Business Case).
 - Ordered** (4 cards): Includes "Start work" (Set Up Project, Cards 167, 168) and "Awaiting Order" (Entry Criteria: Quote Sent, Deadline Set to Offer Validity; Exit Criteria: Cards 169, 170).
- Completed** (1 card): "Success" (Card 171).

- Show colleagues what you are doing and where you are stuck
- Ask for help
- Offer to help them get started

Day 5: ... and work more as a team

The screenshot displays a Kanban board titled "Demo PAS Sales Flow™ Board" with a "Personal Agility Templates" header. The board is organized into columns representing different stages of the sales process:

- What Really Matters** (2 cards):
 - 146 Top Priority Bet
 - 149 No 2 Priority Bet
 - 150 No 3 Priority Bet
 - 151 No 4 Priority Bet
 - 152 No 5 Priority Bet
 - 153 Lower Priority Bets
- Sales Process** (15 cards):
 - Consultation Call** (4 cards):
 - Start the ball rolling
 - Objective: Decide to register for course, or
 - Other Follow-Up required (2 cards):
 - 154
 - 157
 - Scheduled / Waiting for Call (2 cards):
 - Entry Criteria: Call has been scheduled, Waiting for the date
 - Exit Criteria: Identify Need
 - 158
 - 159
 - Strategy Call** (4 cards):
 - Leads to a request for quote
 - Entry Criteria: Call scheduled
 - Other Follow-Up required (2 cards):
 - 160
 - 161
 - Scheduled / Waiting for Call (2 cards):
 - Entry Criteria: Call Scheduled
 - Exit Criteria: Call has been held
 - 163
 - 162
 - Quote** (3 cards):
 - Leads to an order
 - Entry Criteria: Compelling Business Case Identified
 - Write Quote (3 cards):
 - Leads to an order
 - Entry Criteria: Request for Quote, Compelling Business Case
 - 166
 - 164
 - 165
 - Ordered** (4 cards):
 - Start work
 - Set Up Project (2 cards):
 - 167
 - 168
 - Awaiting Order (2 cards):
 - Entry Criteria: Quote Sent, Deadline Set to Offer Validity
 - Exit Criteria: 169, 170
 - Completed** (1 card):
 - Success (1 card): 171

- Would one board for the whole team be helpful?
 - You could walk the board together
 - Identify where you are stuck
 - Collaborate on getting unstuck

What else could you do?

I'd love to hear your ideas and approaches!
How would you deal with dependencies?

If you'd like some help, jump to the last slide

Want dependencies under control? Let's talk!



Peter Stevens

"Companies come to me when they want their initiatives to advance"



Contact me
for a
free consultation

