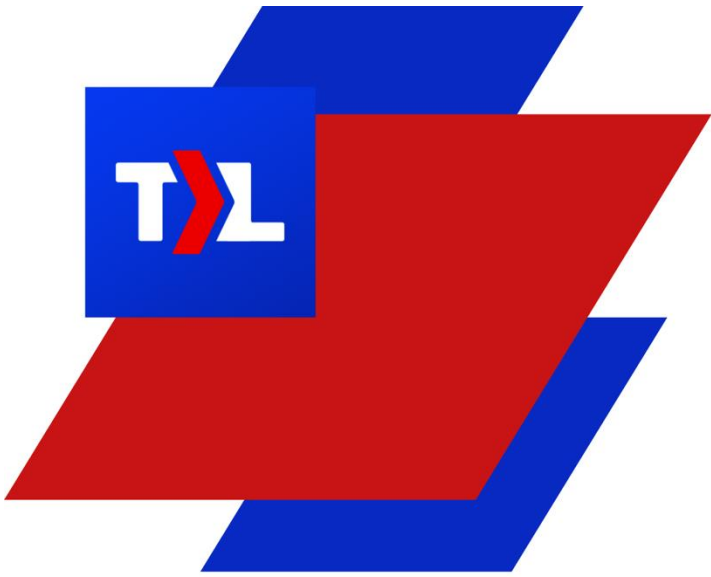




TOP>LEFT

TEAMWORK TRANSFORMER



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TopLeft Teamwork Transformer

Welcome to the **TopLeft Teamwork Transformer!**

This process is for teams who want to see real benefits fast. We will walk you through 4 important steps as you visualize and optimize your processes using kanban boards. Customers can expect to work through our process in **2-4 weeks**, spending 1-2 hours a week.

This guide is for managers who will bring their teams into TopLeft over 4 steps. The most successful TopLeft users always include their engineers, so that everyone is on the same page. That way the whole team works together, making improvements and minimizing back-and-forth messages in Teams or Slack.

Here is an overview of the process:



Step 1: Visualize

Key benefit: Visualize the state of your service and project work

Let's get started by planning and creating your first kanban board. After this step you'll end up with a living dashboard to understand and monitor your team's work.

Create a Board

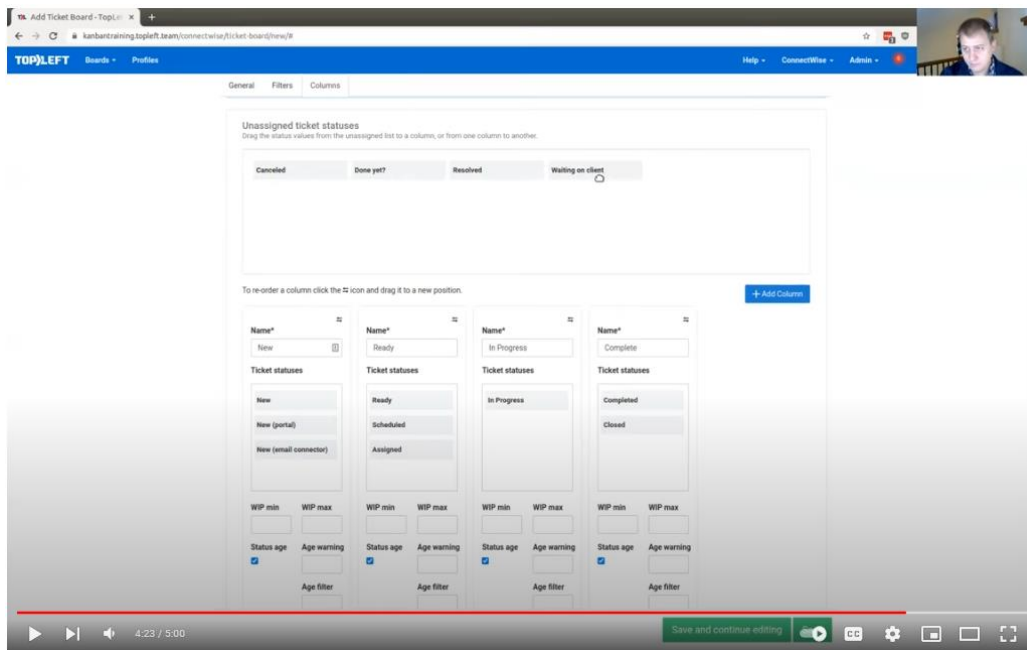
How to Map Workflows

A kanban board represents a process in your team's workflow. In this guide you will set up the overall ticket workflow for service or project teams, from New to Complete.

Each column of a kanban board shows a stage in your process, flowing from start (left-hand side) to finish (right-hand side). To visualize a ticket workflow, most teams start with these 6 columns:

1. **New:** Work in this column still needs to be triaged, defined, or approved
2. **Ready:** Triage and planning is done; work is ready to be started by a technician
3. **Scheduled:** Next step is a future time on the calendar, nothing to do right now
4. **Waiting:** Next step is outside your team's control: shipping parts, hearing back from a customer, etc.
5. **Started:** Technician has started working this ticket and it isn't waiting or scheduled
6. **Complete:** Done! Nothing left to do here

Now let's visualize your mapped process. Watch this 5-minute “Board Setup Crash Course” video to learn how:



<https://www.youtube.com/watch?v=U12twqHV7vU>

Start by creating a Ticket board (or a Task board for Autotask project teams). Use the 6 columns recommended above. Don't worry about getting this part perfect, but make sure to write down what each stage means so everyone can agree. Once you create your first board you will learn where changes might need to be made in TopLeft or in your PSA.

Here are 3 tips for board creation:

1. **Start Simple.** Make a useful board first, then make improvements over time.
2. **Only Display Important Data.** Focus on the info that helps your team make decisions, ignore the rest.
3. **Understand Filters.** Instead of creating personal boards filtered to only one person, make a board for your team. Teach technicians to use the Filters button to view work assigned to them. This changes the page URL so anyone can bookmark their view.

Once your board is created, try it out! Click and drag a card into another column to update the status. Use the **Filters** button to show work assigned to 1 person. You should be familiar with the basics of TopLeft before you teach your team in Step 2.

Add Secondary Boards

TopLeft offers different ways to look at similar data. You can change how much detail is shown, or group work together by common fields. [Try using a swimlane](#) to group tickets into rows by their project, company, or assigned resource.

Recommended for Service Teams: Make a copy of the first board by editing and going to Actions > Clone Board. Now you can change the swimlane to Resource, Priority, ConnectWise Board, or Autotask Queue.

Recommended for Project Teams: Now that you have ticket visibility, set the first board swimlane to Project (or Phase). Create a new Project board following the same steps above to show an overview of all your projects. Use the Ticket Board / Task Board option to add a link on each project back to the first board.

Step 2: Engage the Team

Key benefit: Remove blockers and keep the team focused

With kanban boards in place you can now educate your team and include them in the process. By the end of this step everyone will understand how they should use TopLeft as part of their daily routine.

Explain & Document the Flow

Clear documentation will teach everyone to do the same work in the same way. Write things down before your team comes on board. Your documentation should answer 2 questions:

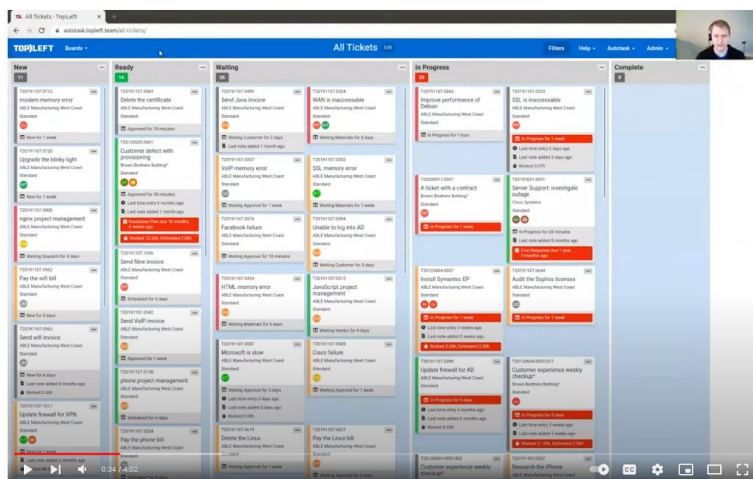
What does each stage (column) mean?

Include the explanation from your process mapping and how work moves from one column to the next.

Which work is the next priority?

Educate your technicians on how to find what to work on next. The next ticket should always be at the top of the column, whether a dispatcher orders tickets by drag-and-drop or if they are sorted automatically by properties like Priority and SLA Due Date. If your current workflow is to schedule every ticket into a tech's calendar then they should always look at the "Scheduled" column.

Include a link to this TopLeft intro video for technicians:



https://www.youtube.com/watch?v=o_PFb6hP2s4

Invite the Team

After documenting how your team should use TopLeft, show them! Introduce TopLeft at a team meeting so everyone understands what to do and how it can help them. Here is an outline to guide the talk:

- **Why TopLeft?** If you keep working the same way in your PSA, you'll get the same results. Highlight key problems that your team is having so they understand why this matters: poor visibility, missed deadlines or SLAs, too many clicks to change anything.
- **Show the Kanban Board.** Give them a guided tour of the app, then walk them through the documentation you just wrote.
- **Ask for Feedback.** This has to be a team-wide process, not something the boss forces everyone to use. Make sure your team feels included and that their feedback is heard. They're the ones working this process every day so they likely know things that you don't.

Now that your team knows what to do, invite them in!

Go to **Admin > Licensing** and assign licenses to the technicians on your team. You can also add other managers that need to log in and oversee the process. Make sure to click the box to "Send email invitations" so they know where to log in.

Implement a Daily Huddle

Starting a daily huddle or stand-up meeting is critical. This short, focused meeting is designed to save time by removing blockers and keeping the team focused. It also helps your technicians adopt TopLeft by implementing a daily ritual; the kanban board will quickly become the first place to look for new work instead of the PSA.

There are lots of online guides on how to run a daily huddle. For a quick start, simply schedule your team for 10 minutes at the same time each day, usually in the morning. Display the kanban board on screen during the call and focus on 3 things:

- What was done yesterday
- What will be done today
- What is blocking the team (overdue work, third party replies, or unclear priorities)

Check out our blog post on daily huddles for more suggestions:

<https://www.topleft.team/2017/05/08/effective-daily-huddles/>

Step 3: Define “Good”

Key benefit: Identify and eliminate neglected work

Instead of writing custom reports or exporting data to Excel, TopLeft makes problems instantly visible. In this step you will highlight work that isn't moving properly through the board.

Limit WIP

Work In Progress, or WIP, is a major workflow killer. When lots of half-finished work piles up, those hours of work aren't bringing value to your customer. It's also overwhelming to keep track of so many items at once. Too much WIP also hides other process problems, stopping us from seeing the root cause.

TopLeft makes it easy to highlight WIP problems. Edit your board and go to the Columns tab. In the "Started" column, type the maximum number of tickets your team should have into the “WIP Max” field. This active work column will now show the card count in red when the WIP limit is exceeded, and green when it's within the limits.

Recommended for service teams: Pick a board with the Resource swimlane. Use the "WIP limits per swimlane" checkbox to apply the limit on each person instead of the whole column. Set the WIP limit to "2": each technician can only work on 1 ticket at a time, but this leaves room for phone calls or emergency tickets.

Recommended for project teams: Pick a board that shows all project tickets for a team. Set the WIP limit based on each team member having 1-2 tickets that are active. With 5 techs on a team, choose between 5-10.

NOTE: If your team has LOTS of work in progress, use a larger WIP number and lower it each week. You should also consider joining our Completed Ticket Challenge for dedicated help and training: <https://www.topleft.team/completed-ticket-challenge-for-msps/>

Set Workflow Thresholds

How do you know when work is off track? As an example, this might be when a ticket has breached its SLA, or when it hasn't received an update in 5 days. There are lots of problems to watch out for, so you need to be able to spot them quickly and easily.

Start by flagging tickets that stay in the same status for too long. Edit your board and go to the Columns tab. Make sure that the "Status age" checkbox is ticked, and in the columns below use these settings for "Age warning":

- Ready: **2d** (after 2 days)
- In Progress: **3d**
- Waiting: **7d**

TopLeft can also highlight problems with budget hours, SLAs, due dates, and time since last time/note entry. Most warnings will turn on a red flag once the limit is passed. SLA and Due Date warnings will show an orange warning before their date is reached. For example: an SLA Warning of "2h" will turn orange if the SLA is within 2 hours of being breached.

Keep the Team Informed

Let your team know about these WIP limits and thresholds so they all aim at the same target. You should also review the red flags in your daily huddles so you can spot the problems and celebrate progress together.

TIP: For detailed monitoring, use the **Warnings and errors** metric to show counts of yellow/red cards.

Step 4: Start an Ongoing Success Cycle

Key benefit: Improve a targeted metric every week

Congratulations! Your board is looking great, and your team is using TopLeft at least once a day. Now it's time to adopt an important kanban ritual: **continuous improvement**.

Scheduling a Success Cycle

The Success Cycle is a 15-30 minute meeting where your team makes small, measurable changes on a repeating cycle. Make this a part of your weekly team meetings. That way there is a clear cycle (1 week) and you can include everyone in the discussions.

Your team works these processes all the time; remember to listen to their feedback. You could even nominate one of them to run this session.

With your session scheduled, you're ready to kick off the 3 steps to the cycle: **Identify, Experiment, Review**.

Identify

Pick a key metric to focus on improving this cycle. Sometimes a kanban board will make this choice obvious, like minimizing WIP in one column, or reducing warnings by cleaning up old and overdue work. It could also be a spot where your team struggles, or where you've heard customers recently complain.

Try to focus on problems of **waste**. If you're not familiar with [the 7 Wastes of Lean Manufacturing](#), here are a few ideas:

- **Waiting:** Where does work sit around **waiting** to be completed? What causes that delay?
- **Defects:** What tickets get reopened because they **weren't solved properly**? Is there a pattern?
- **Overproduction:** Are you doing **more work than necessary** at a certain stage, or too early in the process?
- **Motion:** What process takes **lots of steps** (or clicks) to complete? Can it be simplified?

If you look at your kanban boards, you might also see a clear **bottleneck** in the workflow. A bottleneck is a part of the process that is running at full capacity but still ends up being the slowest point as work flows through. Some common bottlenecks are:

- A column with the most tickets piling up
- A technician who always has too many Started tickets
- A client that opens up tickets faster than you can close them

Experiment

Once you identify a key metric, brainstorm as a team how you might improve it. If you want different results, you need to try something different.

Below are 2 example metrics with a couple experiments your team might want to try.

Example Metric #1: Improve SLA first response rate

- **Experiment A:** Designate a team member each day/week to focus on responding to new tickets before working on another project
- **Experiment B:** Have the whole team monitor unassigned tickets using a kanban board with a Resource swimlane

Example Metric #2: Minimize number of tickets waiting for customer responses

- **Experiment A:** Automate or simplify an email template sequence
- **Experiment B:** Schedule 15-30 minutes during the week for everyone to call through their "waiting" tickets list
- **Experiment C:** Give your clients a self-serve option to book a callback time into your calendar

Track your experiments and their results somewhere common so everyone can watch the progress growth over time.

Review

Look at the results. Did the changes work? Why or why not?

If your experiment wasn't a success, try something new. If the metric improved, consider whether you are focused on the right metric. Something else might be a more important target. Your team will start to learn this rhythm as they go through the cycle 3 or 4 times. Once you have a couple wins under your belt, you'll wonder how you managed to get by with only your PSA.

Additional Resources

No time to finish on your own?

Done and looking for the next step?

TopLeft offers different training options to meet your team where you're at.

Sign Up for Training