iNNolutioN
agile innovative solutions
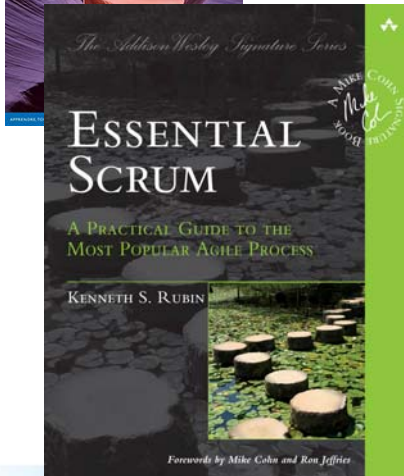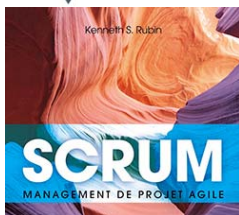
Managing Opportunities and Work in a Small Chabad
Using Agile Principles
October 31, 2013
by Ken Rubin

www.innolution.com

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✳ Background of Ken Rubin

Trained over 20,000 people

Coached over 200 companies ranging from startup to Fortune 10

#1 Best Selling Author on Amazon

Ran worldwide non-profit organization that today has 200,000 members

Worked at 10 start-up companies, as well as large companies like IBM

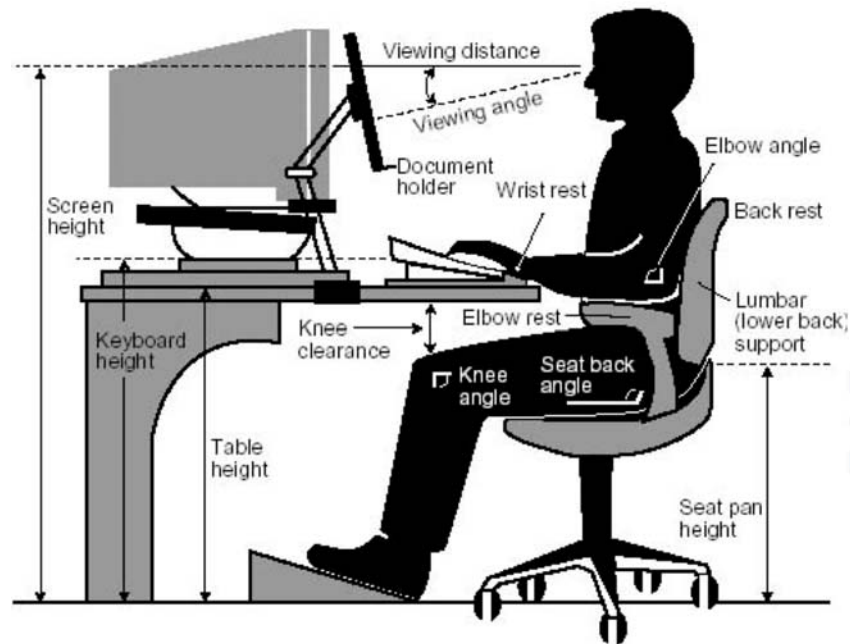Raised over $150m in venture capital funding

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Why am I here?

I'm not here so you can help me perform mitzvot!

☀ I'm not here to...

☀ I am here to help you..

Apply the same Agile principles that successful high-technology companies use to manage their opportunities and work

What work you should do

When should you do each activity and task

Who should do the work

How much work should you do at the same time

How to plan and manage the work

☀ What is agile?

Agile is an approach to managing work that is based on core principles such as:
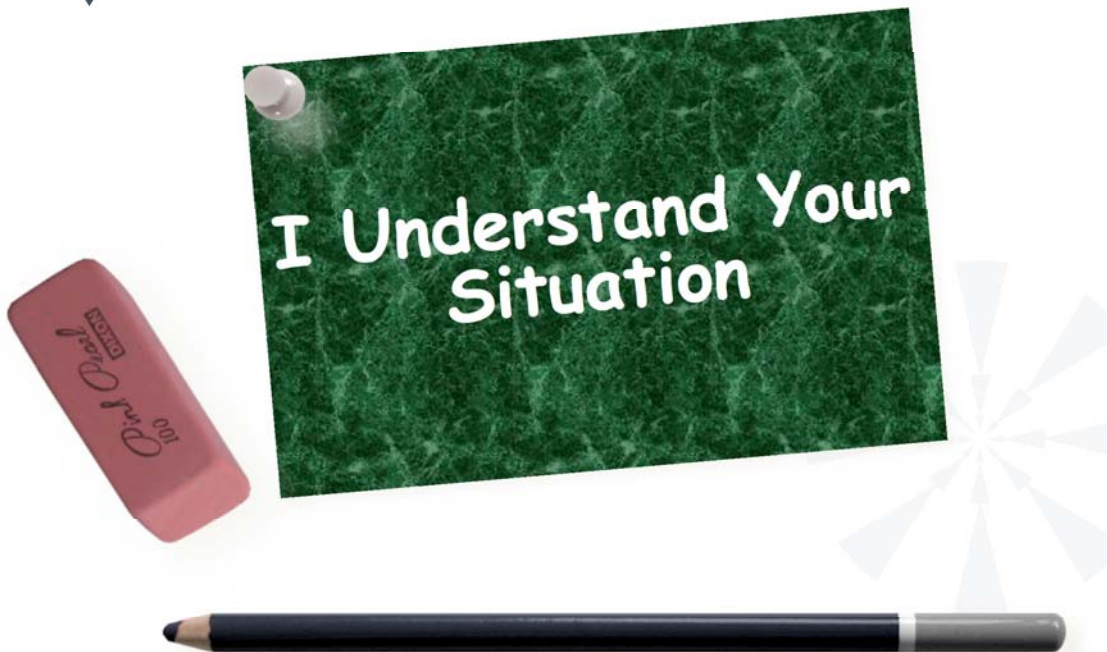
Assume you can't plan it all correctly up front

Keep your options open

Continuously inspect and adapt

Validate assumptions by getting fast feedback

Work in small batch sizes

☀

✳ Life of a Shliach – The Doer

✳ Life of a Shliach – The Hectic

Action	Justification
Spend today!	Don't worry, we'll figure out how to pay it back!
Never say no to a meeting	Who knows what might come of it!
Just keep adding on!	Let's do a teen club, some kids might show up!
Don't put everything the in calendar	Seeing it there would scare or depress me!
Turn phone off	Don't want to be reminded of all the stuff I have to do!
Don't delegate	Why pay him $15/hr when I can just do it myself? I have the time!

You're Drowning in a Sea of Opportunity
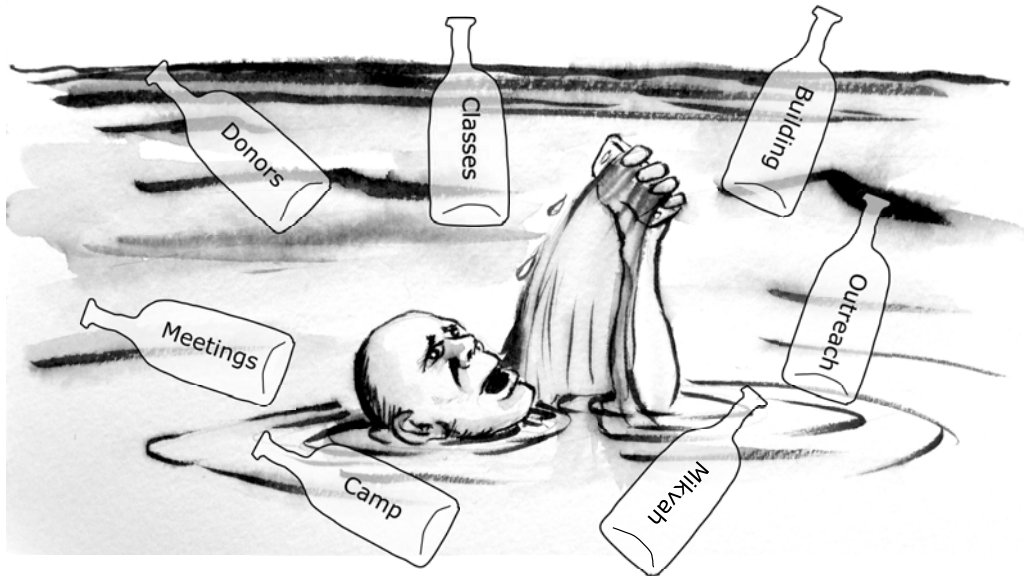
✳

You're a Startup

I am not so different than you!

I've worked at 10 startup companies
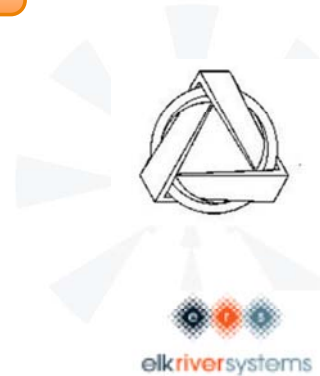
Starting a Chabad is similar to starting a company

You operate very much like a startup company

Dimension	Chabad	Startup Company
Money	Your credit card; initial donors	Credit cards; friends and family; seed funding
Big Fear	Not having enough money to fulfill your mission	
Staff	You and your wife	Founders in the garage
Opportunity	Overwhelming	
Competition	Anyone who thinks the newcomer is stepping on their turf	

Managing Opportunities and the Work

✳ Vocabulary for discussing work

Term	Definition
Work	Generic, all encompassing term referring to the things we do
Holiday	Jewish holidays that are predictable anchor points for possible events
Event	Well-defined occasion or happening (e.g., Purim Party, Shabbat Services). Some events are associated with Holidays, some are not.
Activity	Actions, logistics, things that need to be accomplished or achieved to make an Event be successful
Task	Small, well-defined piece of work that needs to be performed to complete an Activity (e.g., phone call, meeting, etc.)

✳ Example work related to Purim

✳ Purim is a Holiday

  ✳ Purim Party is an EVENT planned for that Holiday

  ✳ One or more Activities have to be accomplished to have a successful Purim Party

    ✳ Secure the venue
    ✳ Order the food
    ✳ Etc.

  ✳ Each Activity has one or more tasks that need to be performed:

    ✳ Call different venues to check on availability
    ✳ Sign a contract
    ✳ Etc.

✳ Important questions to answer

Question	Description
What	What work should we do?
When (Prioritize)	When should we do each piece of work?
Who	Who should do the work?
How much (at same time)	How much work should we do at one time?
Plan and Manage	How do we plan and manage the work?

What Work Should We Do?

Work at two levels

Work the Chabad House should do	Work that the Rabbi should do himself

בית חב"ד
CHABAD HOUSE

Types or categories of events

At the Chabad level, we need to determine what types of events and projects to do

Type
Planned Outreach Events
Planned Life Events
Emergent Events & Tasks
Big Events / Major Projects

Planned outreach events

Examples: Shabbat minyan, High Holidays services, Chanukah candle lighting, Purim party, Pesach seder, evening classes, etc.

Aspect	Yes	No
Fixed Date	✔	
Recurring	Mostly	
Predictable	✔	
Template	✔	

Most of these are core to your mission

Should be no surprises and no emergencies!

Planned life events

Examples: Births, Bris, Bar Mitzvahs, Weddings, Birthdays, etc.

Aspect	Yes	No
Fixed Date	Mostly	
Recurring	Some	Mostly
Predictable	✔	
Template	✔	

Most can be handled in a similar or identical way

Emergent events & tasks

Examples: Sudden death, Colorado flood, unanticipated meeting

Aspect	Yes	No
Fixed Date		✔
Recurring		Not same event
Predictable	Possibly	Usually
Template	A few	Most

Most can be handled in a similar or identical way

Big events / projects

Examples: Camp Gan Israel, building a new Chabad House

Aspect	Yes	No
Fixed Date	Typically	
Recurring	Some	Some
Predictable	Usually	
Template	Some	Many

Probably larger than most of the other forms of work

Quick event sorting

Some of these events immediately can be classified into one of three buckets

Must Do

Nice to Do

Won't Do

Be careful not to overflow this bucket!

Based on capacity, we want to do these.

Very important to determine what goes in this bucket!

Example: should we have camp Gan Israel or not?

- Q1: Is the camp aligned with our mission?
  - Sure it is!
- Q2: Should we do it, or not?
  - Do we have the capacity to do it?
  - What is the opportunity cost of doing it?

Using Agile principles to decide
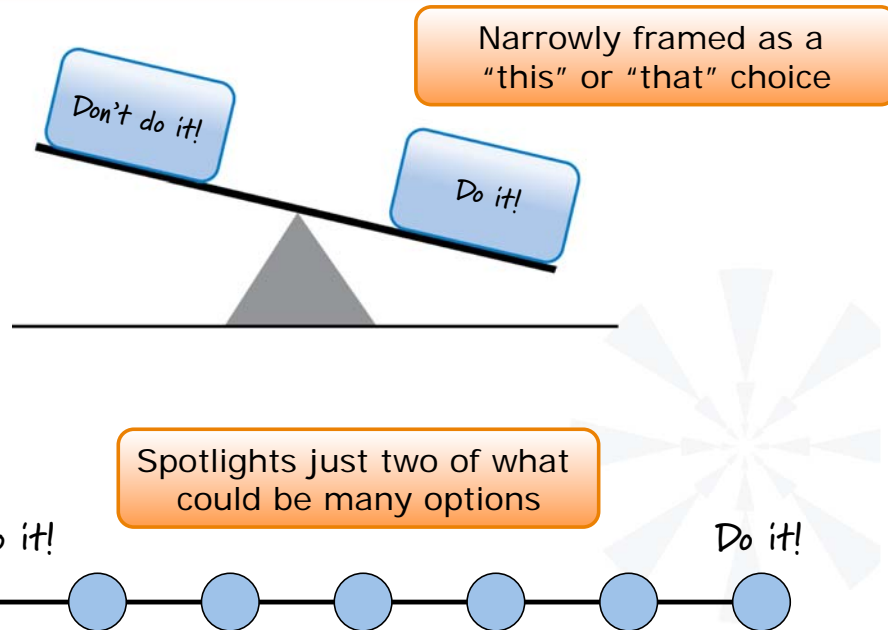
Avoid narrow framing

Work in small batch sizes

Keep your options open

Validate assumptions by getting fast feedback

Leverage the wisdom of others

Camp Gan Israel – avoid narrow framing

Narrowly framed as a "this" or "that" choice

Don't do it!

Do it!

Spotlights just two of what could be many options

Don't do it!

Do it!

Camp Gan Israel – work in small batch sizes

When you don't know what you're doing, you don't do it on a large scale!

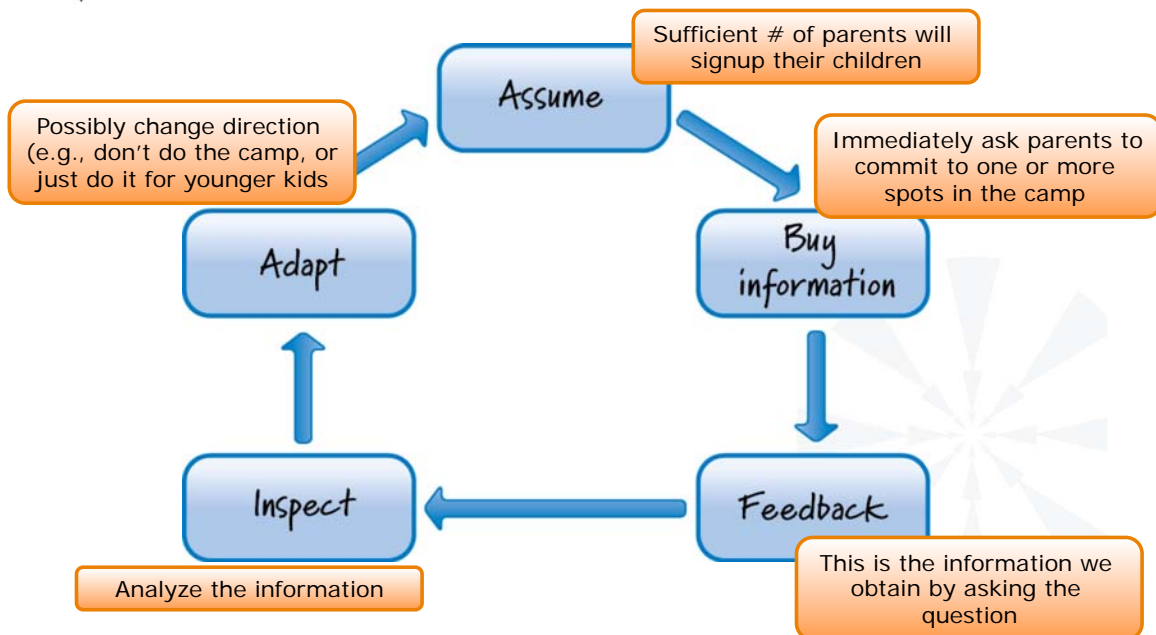Initially, just for one age group this year

Widening our options found an opportunity to work in small batch sizes so we can learn before we scale up
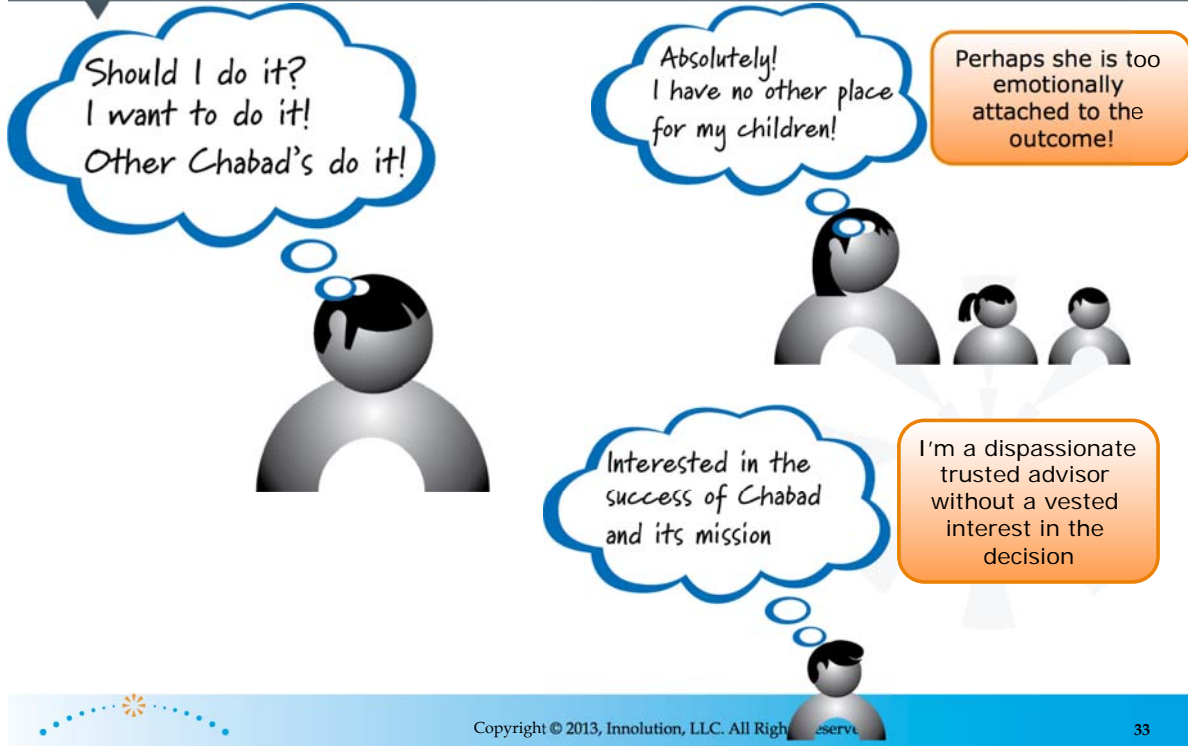
Camp Gan Israel – keep your options open

Might need non-refundable deposit on venue

Much clearer if camp is viable

Waited too long and available venues are more expensive and parents selected other camps

Cost

Last (economically) responsible moment

Cost of deferring

Cost of deciding

Probably won't lose any registrations at this point

Can't wait much longer, parents need to decide

At this point the risk of being wrong is low, but we waited too long

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Camp Gan Israel – validate your assumptions with fast feedback

Sufficient # of parents will signup their children

Assume

Possibly change direction (e.g., don't do the camp, or just do it for younger kids)

Immediately ask parents to commit to one or more spots in the camp

Adapt

Buy information

Inspect

Feedback

Analyze the information

This is the information we obtain by asking the question

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Camp Gan Israel – leverage wisdom of others

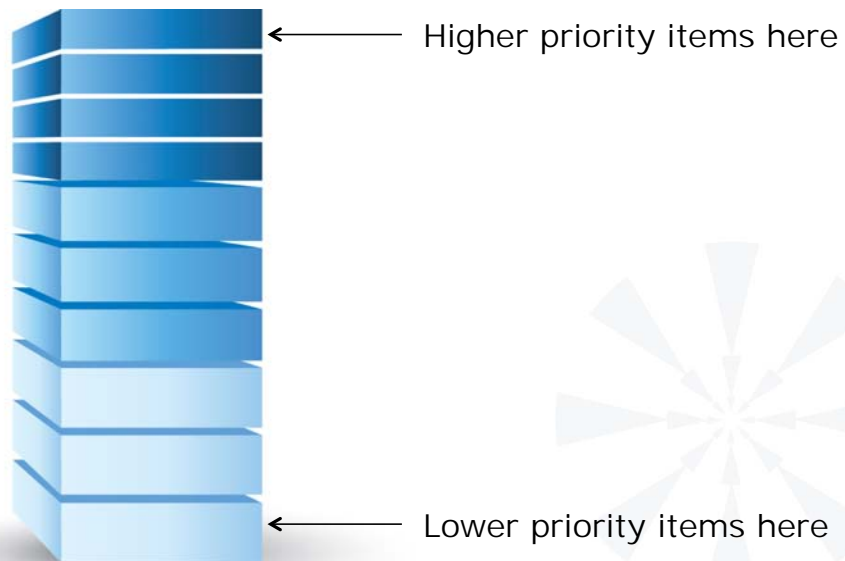# ☀ You can't do everything

YOU CAN DO ANYTHING,

BUT NOT EVERYTHING.

-DAVID ALLEN

Eliminate those things that aren't strategic

Prioritize those that remain

☀ Need to have a prioritized list

Higher priority items here

Lower priority items here

Factors that influence priority

Money/Profits

Cost of Delay

You need money

- Without money it is difficult (impossible) to fulfill your mission as a Chabad outreach emissary

- Good startup companies, like you, have a mission that transcends money

Give people the power to share and make the world more open and connected

Money (profit) funds outreach

Goals of our work might include...

But we need to prioritize our work in terms of money (profit)

- More mitzvot
- Donor participation
- Community awareness
- Better Jewish relations
- Happier Shlichim
- ...
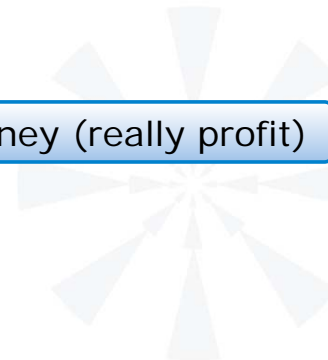
→ Money (really profit)

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Self reinforcing virtuous cycle

- More mitzvot
- More Jews engaged
- More donations
- More money (profit)
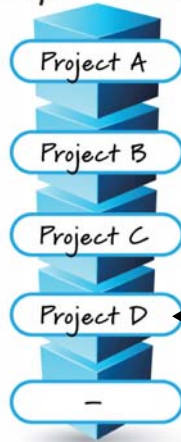
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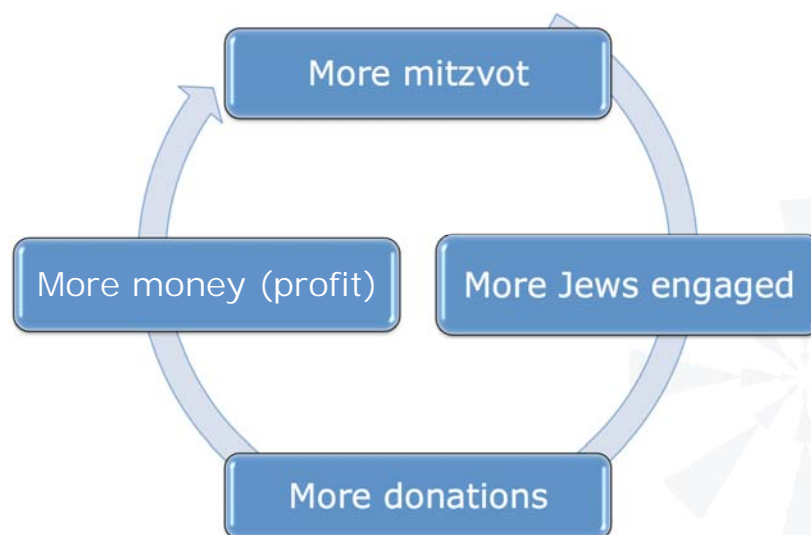
Cost of delay

If you delay work what would be the cost of that delay (in money/profit)?

Portfolio backlog

Project A

Project B

Project C

Project D

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Items further down in the list get worked on later, so they are delayed

Different event types have different cost of delay profiles

Event Type	Examples	Cost of Delay Profile
Planned Outreach Events	Shabbat Minyan, Pesach seder	Fixed date
Planned Life Events	Bris, Bar Mitzvah	Fixed date
Emergent Events	Sudden death, Colorado flood, meeting with big donor	Must do now (expedite)
Big Events / Major Projects	Camp Gan Israel, new Chabad house	Fixed date

Dealing with emergent events
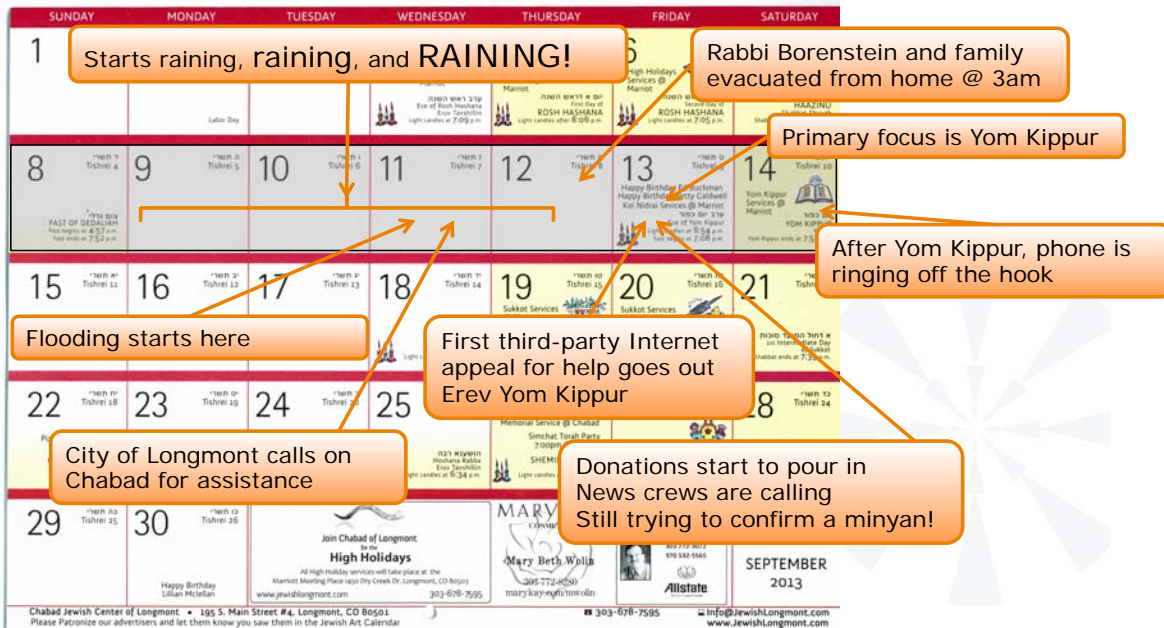
* Can't be ignored for any length of time

* Need to act soon or immediately

* Can and often should interrupt other forms of work that are taking place

* The value of doing the work declines rapidly
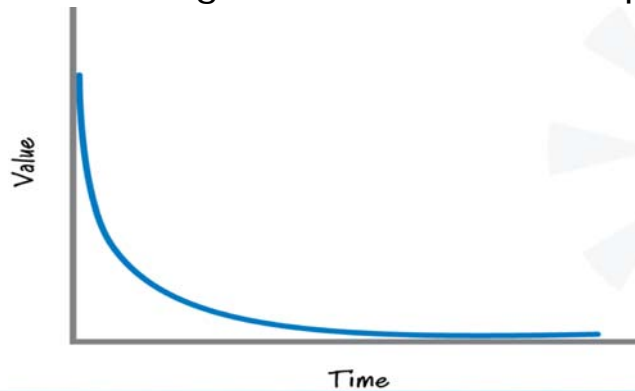
Example emergent event – 2013 Colorado Flood

The unfolding of an emergent event

- Starts raining, raining, and RAINING!
- Rabbi Borenstein and family evacuated from home @ 3am
- Primary focus is Yom Kippur
- After Yom Kippur, phone is ringing off the hook
- Flooding starts here
- First third-party Internet appeal for help goes out Erev Yom Kippur
- City of Longmont calls on Chabad for assistance
- Donations start to pour in News crews are calling Still trying to confirm a minyan!

Chabad Longmont response

Chabad of Longmont
Takes action in response to the Flash Floods!
Click here for relief, to volunteer, donate, and more!
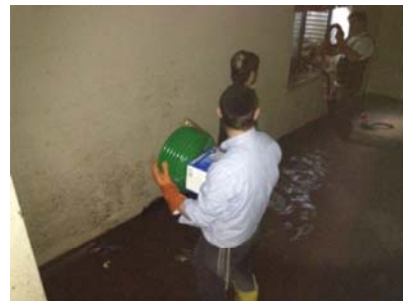
- Act immediately
- Cost of delay is enormous
- Stop doing other non-essential work

Who Should Do The Work

Define your (Rabbi) personal work buckets

Must Do   Nice to Do   Won't Do

✳ The delegation problem...

Overwhelming desire to do it all yourself

Every hour you spend wearing the janitor's hat is one less hour you spend on outreach

✳ What is the value of your time?

Item	Amount	Notes
Your salary	$75,000	Even more if we add in parsonage
Work hours in a year	2,000	I know, you work that in a week!
Income per hour	$37.5	$75,000 / 2,000
Cost to hire a janitor	$15/hour	Perhaps higher in your area
Opportunity cost	???	Whatever work you are uniquely qualified to do that you didn't do!

Also, are you doing work that you are NOT qualified to do?

Initially doing the work yourself has advantages

You get to learn the work

You have enough expertise to know what needs to be done

Puts you in a better position to make an informed choice as to the level of delegation

Lets you appreciate (or not) the quality of the work that someone else does

Seven levels of authority

Level	Name	Description	Example
1	Tell	Rabbi makes the decision and tells the team	Topic of my sermon
2	Sell	Rabbi convinces team about decision	Convince people to sell a raffle
3	Consult	Rabbi gets input from team before making decision	Where to locate the new Chabad house
4	Agree	Rabbi and team make decision together	Choose material for Hebrew school classes
5	Advise	Rabbi advises to influence decision made by team	Select off-site location for High Holiday Services
6	Inquire	Rabbi inquires after team has made the decision	Day to day operation of the camps
7	Delegate	Rabbi fully delegates decision to team	Purchase a replacement computer

How Much Work at the Same Time

Every organization has a limit to the amount of work it can do

Why should a good restaurateur not seat paying customers at an available table if 30% of the servers called in sick that evening?
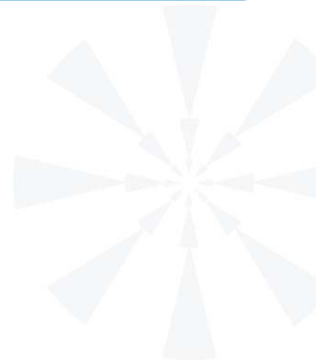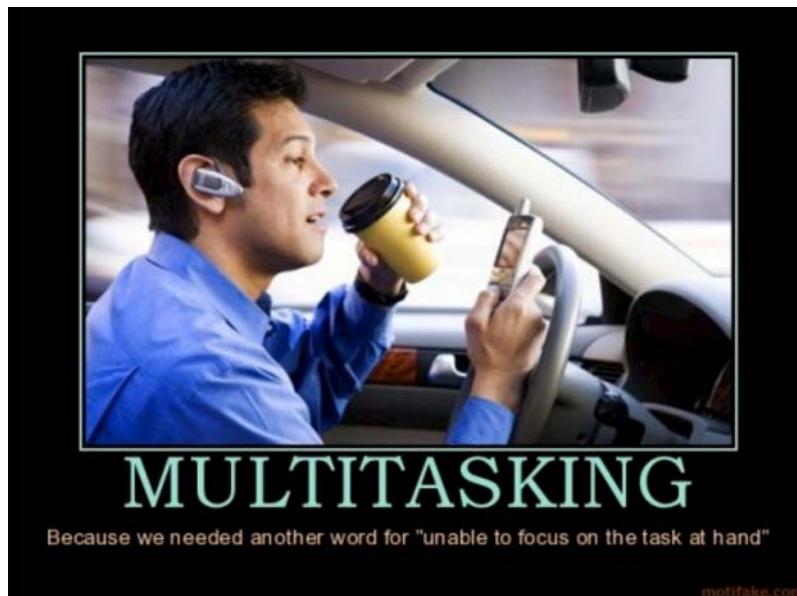
What is a WIP limit?

A work-in-process (WIP) limit would state how much work we are willing to have active at the same time

Goal is to match WIP with available capacity

Reduce the amount of multi-tasking

MULTITASKING
Because we needed another word for "unable to focus on the task at hand"

motifake.com

☀ Multitasking

Clark and Wheelwright (1992) studied multi-tasking and determined that when working on more than **two projects**, a person's time spent on value-adding work drops rapidly
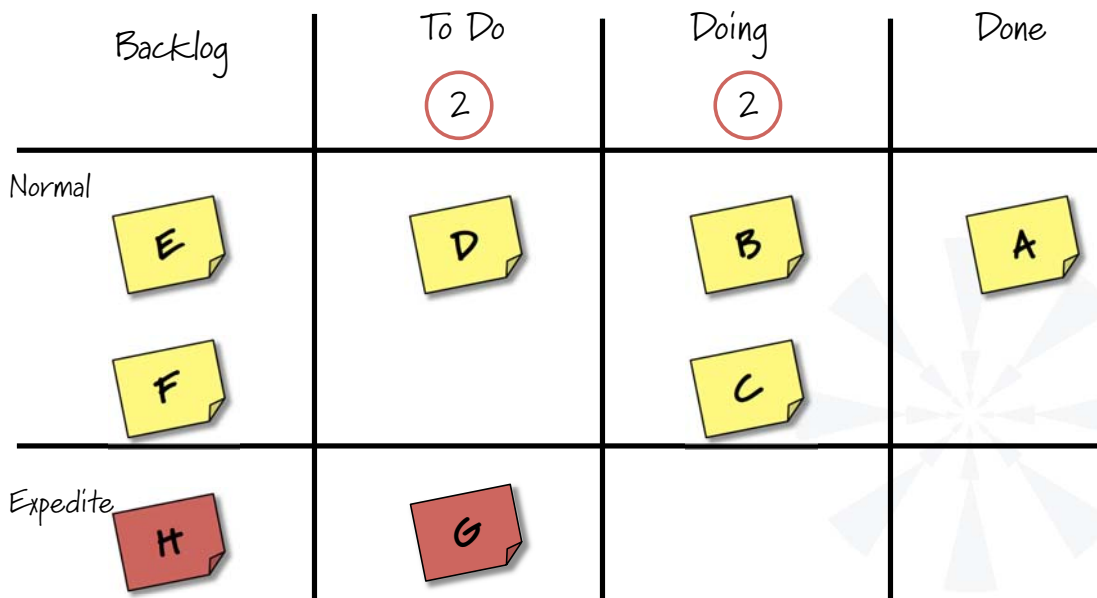

Percent time doing value-adding work vs. Number of concurrent projects

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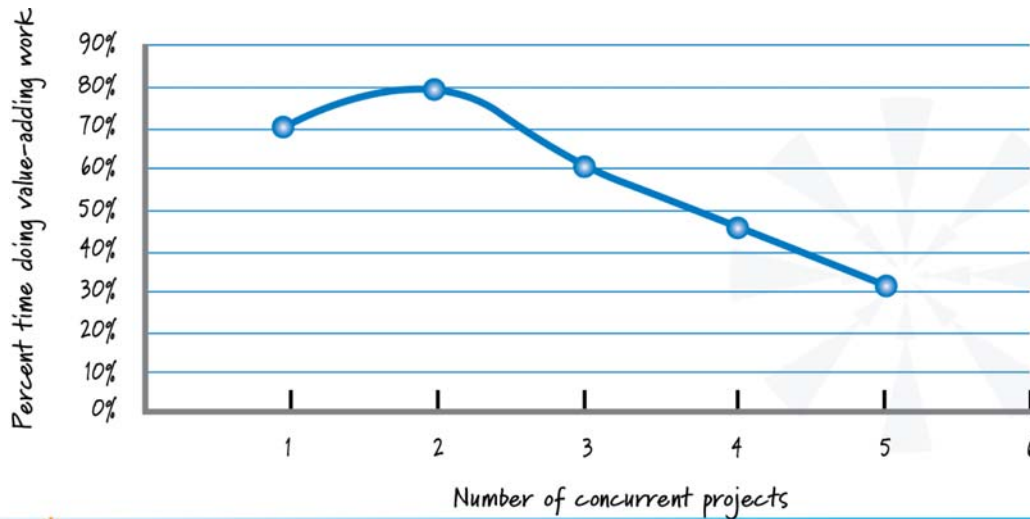
Plan and Manage the Flow of the Work

Simple approach to visualizing and managing work

Backlog	To Do ②	Doing ②	Done
E	D	B	A
F		C	
G			
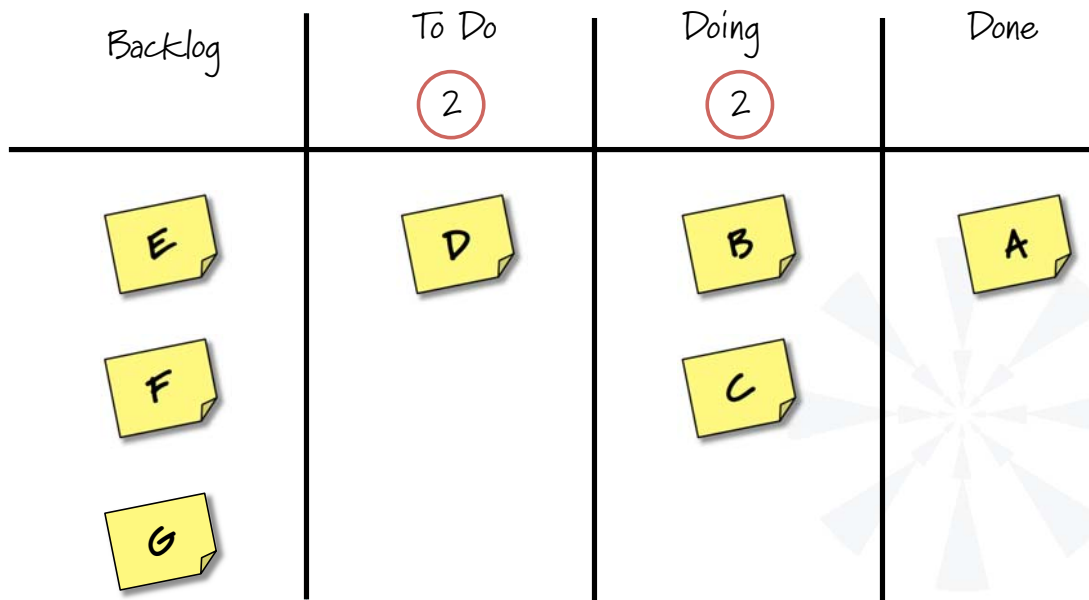
Example with different classes of service

	Backlog	To Do ②	Doing ②	Done
Normal	E	D	B	A
	F		C	
Expedite	H	G		

Example portfolio-level event board

Jan '14	Feb '14	Mar '14	Apr '14
Tu B'Shevat Shmuel's Bar Mitzvah	Israel Trip	Purim Party	Pesach Seder

May '14	Jun '14	Jul '14	Aug '14
Lag B'Omer BBQ	Shavout Ice Cream Party Asher's Bar Mitzvah		Benji's Bar Mitzvah

Sep '14	Oct '14	Nov '14	Dec '14
Rosh Hashanah	Yom Kippur	Sukkot	Chanukah Bowl

Example Chanukah event template board

8 months before	7 months before	6 months before	5 months before
		Secure venue	

4 months before	3 months before	2 months before	1 month before
		Find main donor Finalize invitation card	Confirm Police Car Menorah / Confirm dates old age home Confirm date with Park / Send out mailings

3 weeks before	2 weeks before	Week before	Week of event
Email Volunteers Find co-sponsors Confirm menu	Confirm volunteers old age home	Line up volunteers for food	Prepare Food

☀ Example day-to-day board

Backlog		This week	Today ⑤	Doing ③	Delegated ②	Done
Jan '14	Chabad					
Feb '14						
Mar '14	Personal					
Apr '14	Recurring	Item	Repeats	Last	Next	Done

☀ Chabad of Longmont, Colorado board
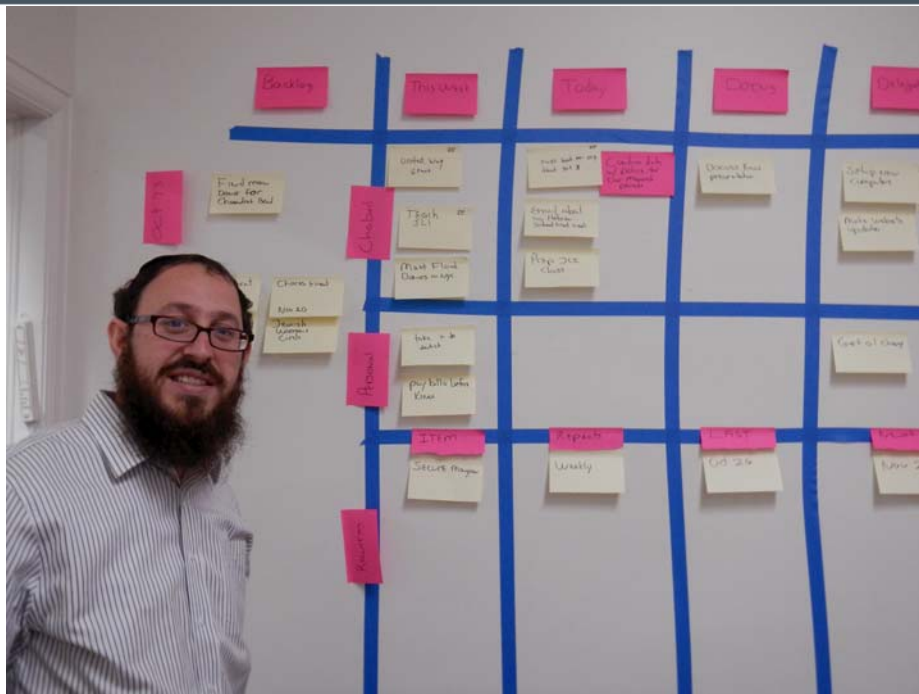
Retrospective of process

Discuss what is working

Discuss what isn't working

Consider changes to make to the process
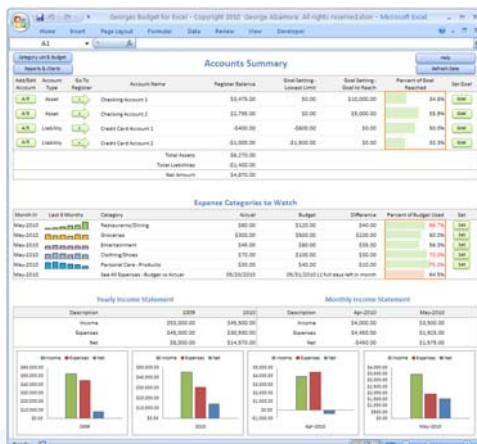
Spend 30 minutes to 1 hour every week

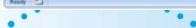# Retrospective of work – Camp Gan Israel

Need to inspect and adapt the work

What can we learn this from year's camp that can help make next year's better?

Did you create a spreadsheet showing your projections versus your actuals?

How many donuts did you order this year? How many got eaten? How many should you order next year?

Summary – Manage opportunities and work with a big head not a small head

Question	ראש גדול	ראש קטן
What	Do the "right" things	Do everything
When (prioritize)	Based on money and cost of delay	Nosiest person first
Who	Work distributed to resources based on skills and availability	Rabbi and Rebbetzin do everything
How much (at same time)	Know the reasonable capacity to do work, and don't exceed it	Do everything at the same time
Manage	Manage for fast and flexible flow	Manage like a משוגע

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Essential Scrum: A Practical Guide to the Most Popular Agile Process	www.essentialscrum.com

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