Kanban Principles for Virtual Teams

These Kanban principles for virtual teams will help you navigate the many challenges involved in working with team members in other cities, states, or countries. Regardless of the distance between you, the challenges facing remote teams are many: In addition to audiovisual challenges and other logistical issues, virtual teams face challenges with staying strategically and practically aligned.

Much can be said about the value of "watercooler conversations" – informal, brief connections that happen throughout the day within teams that are physically co-located. These touchpoints not only create deeper social relationships between team members, they also provide opportunities for team members to seek clarification and regain alignment about the work they are doing.

Although online communication tools can recreate some of these opportunities, keeping virtual teams aligned requires more proactive communication at the team level, a challenge that Kanban principles are uniquely able to meet.

Another challenge facing virtual teams is managing capacity. It's much harder to know who's overworked and who has capacity, when you aren't sitting in the same room with your team. Kanban

helps teams visualize their workloads, while Kanban principles hold everyone accountable and help leaders distribute work more evenly.

Here are five Kanban principles that can help virtual teams overcome the challenges they face, by helping them stay focused, connected, and aligned.

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5 Kanban Principles that Encourage High-Value Team Collaboration

1. Share responsibility for your team's workflow.

Unlike prescriptive work methodologies, Kanban gives you the freedom to map your own workflow. To do this, the team must discuss its process, agreeing on how the work gets done and then mapping that workflow on a Kanban board.

With this great freedom comes great responsibility: In Kanban, everyone on the team shares the responsibility of building the board, using the board, and updating the board consistently. This is far different from traditional workflow management methods, which typically assign the responsibility of prioritizing and distributing work to leaders.

Kanban boards enable sharing of a consolidated view of work priority and project status, whether in the same room or distributed across the globe.

The Kanban principle of sharing responsibility for the team board forces teams to communicate more intentionally about how work is done. It triggers high-value conversations that reveal not only the hidden intricacies of your work, but also how each team member works and thinks. Once you've identified your process, the team can openly discuss how work flows, and where work gets stuck, to help pinpoint how to improve workflow, cycle time, and throughput (more on these metrics in a later section).

Teams that work together to actively, consistently manage their workflows with Kanban are able to execute handoffs more smoothly, collaborate more deeply, and operate with a better understanding of how each individual's work contributes to larger team goals.

2. Communicate consistently using the board.

You'll notice that nearly all of these Kanban principles have something to do with communication: At its core, that's what Kanban is all about. Communication is essential for practicing Kanban, and practicing Kanban is a great way to encourage deeper communication than most teams have ever experienced.

> *Kanban boards and cards represent a shared visual language that team members and stakeholders can use to quickly communicate high-value information in a way that is frictionless and transparent.*

When issues arise, you can involve the people who are part of the problem and let the rest of your team continue to work. Striking the right balance between targeted and mass communication helps teams bring the right people into the right conversations at the right time.

Card details can be used to quickly communicate card assignments, due dates, card size, and other information about the work itself, as well as status, through visual indicators like blockers, or different colors for cards that are "stale" or past due.

Card Details

Card assignments

What They Communicate
Communicate who is responsible for the work item

Card Details
Due dates

What They Communicate
Communicate when the work is expected by the (internal or external) customer

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Card Details
Card size

What They Communicate
Estimates the amount of effort that will be required to complete a work item

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Card Details
Blockers

What They Communicate
Visual icons that indicate when a work item is unable to move forward in the process due to internal or external factors

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Card Details
Card types

What They Communicate
Can be used to communicate a variety of things, such as the type of work or priority of the work item

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Card Details
Vertical lanes

What They Communicate

Communicate where work is in a team's process

Card Details
Horizontal lanes

What They Communicate
Can be used to visualize parallel processes, can help add specificity to workflows

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Card Details
WIP limits

What They Communicate
Used to visualize and communicate capacity and help teams more effectively manage their workflow

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Card Details
Process policies

What They Communicate
When visualized, help to communicate how to use the board in a way that is consistent with how the team has chosen to use it

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In addition to the details on the face of the card, most Kanban tools also include the ability to add information within the card itself. These additional card details can include:

- Comments made by anyone who has worked on the task

- Card history (who moved the card when, when were details added or changed)

- Attachments or links to documentation or deliverables related to the task

Having all these details in a single place also minimizes the time spent tracking down progress reports or sitting in status update meetings. As a result, teams can:

- Reduce the time spent in low-value meetings

- Empower team members to get information without always involving others

- Ensure that when the team does meet (such as during daily standups), the conversation is meaningful and productive
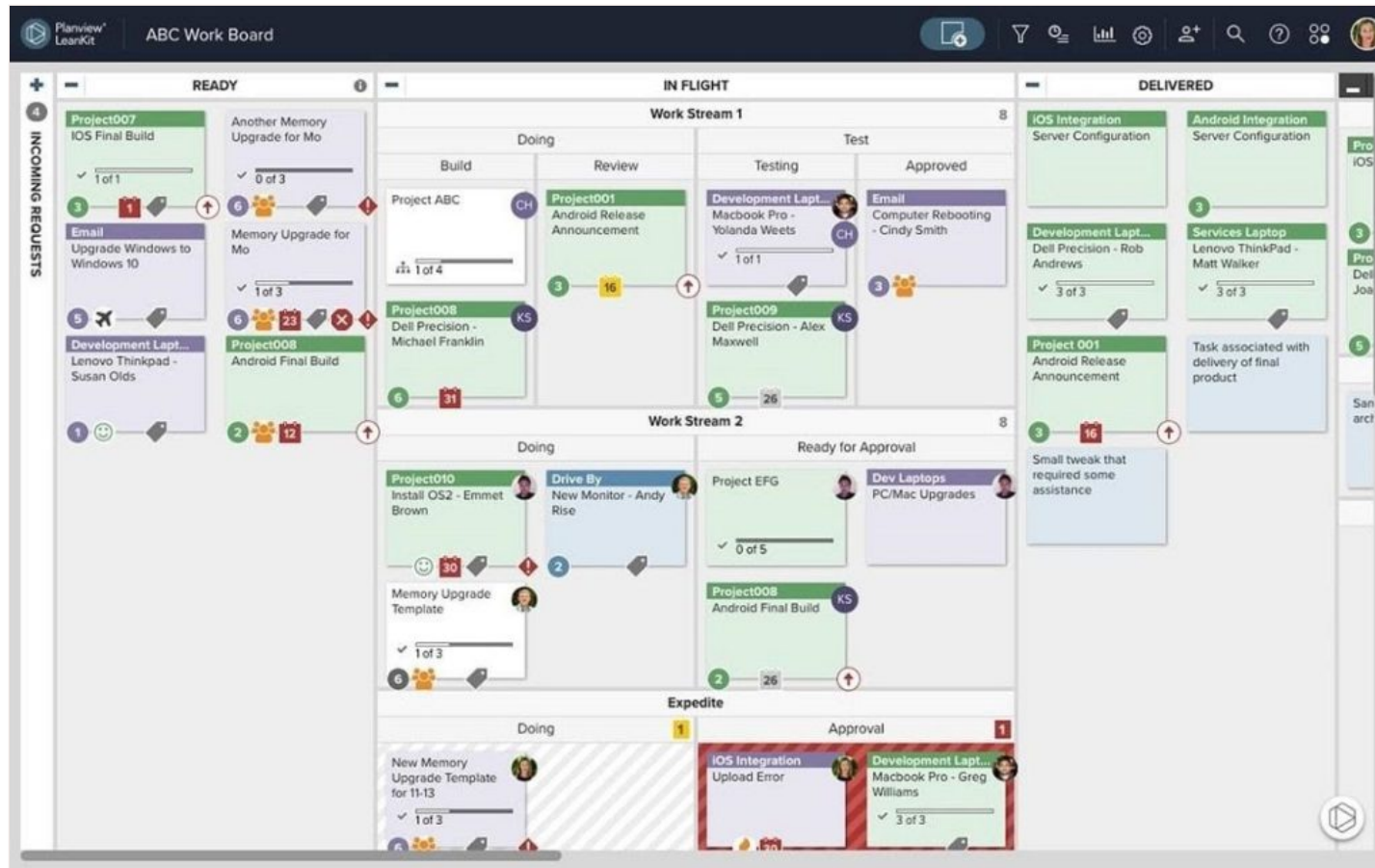
Identify blockers sooner and resolve them faster by creating a shared language on your Kanban board.

3. Empower team members to talk about flow and address problems as they're happening.

Many organizational structures position management with the lion's share of responsibility to identify and communicate issues. One of the key Kanban principles is that team members are empowered to

see the issues and bottlenecks for themselves.

This regularly allows rich conversations to take place between management and team members about how the work flows:

- What's moving?

- What's not moving and why?

- What needs to happen so work will start moving again?

- What patterns do we see in our workflow?

- Are any team members being over- or under-utilized? What can be done to resolve this?

This helps the team remain focused on its priorities, while also helping to point out key issues like blocked or stalled work in a way that the whole team can see.

Teams practicing Kanban often use short, focused meetings called standups to get the whole team aligned around work. They also hold meetings called retrospectives, in which they discuss work that has already been done, and how the process the team followed could have been improved.

When implemented effectively, standups and retrospectives are powerful tools for teams that seek transparency and open collaboration. Kanban boards can help focus discussions in a more meaningful way to empower the entire team to identify, address, and evolve past problems.

4. Operate as a pull system to facilitate the prioritization of work and work-in-process (WIP) limits.

One of the most overlooked and underutilized Kanban principles is the idea of operating as a pull system, in which team members pull work into the system based on their capacity. This is different from a push system, in which team members push work from one step to another without regard for capacity.

Operating as a pull system is more difficult because it requires the team to more actively practice systems thinking. But it's worth it: A push system imposes work on team members, and if too much is forced into the system, clogs it up and slows everything down (and often makes for poor work quality, too).

Limiting the amount of work based on capacity helps work flow smoothly across the board at a rate that maximizes efficiency. A pull system is also better because it encourages team members to communicate proactively, before work begins on any task, reducing the risk of work that must be redone later.

> *In a pull system, work can be prioritized in the backlog and then pulled according to priority.*

Teams work with managers to prioritize the work that needs to be done, and the team works to pull work into "doing" based on its true capacity.

If you shift your mindset to think as a system rather than an individual contributor, the effect of pulling new work and having WIP limits encourages you to think of the impact that new work will have on the rest of the team.

Inevitably, this requires more conversation. Someone who wants to pull new work onto the board needs to talk to everyone who will be involved, so that all team members can commit to completing the work before it's started.

Although this might feel like an additional or unnecessary step, it can actually save a lot of time and effort down the road. Often, individuals within a team will begin work on a task before getting a full understanding of the context of the work or without checking to make sure that the work requirements are accurate.

This results in waste in the form of rework, or duplicated effort. Discussing the work item as a team before it is pulled into the system helps to ensure that team members are fully aligned about work details and priorities before any work is completed.

5. Use the board to fuel continuous improvement efforts.

Perhaps the most well-known Kanban principle is that of continuous improvement. Kanban is all about evolution, instead of revolution. Managing your work via a Kanban system gives teams the tools to measure flow and the levers to pull so the team can improve its processes and effectiveness.

Simply taking the steps required to map out your workflow and begin moving your work through a defined process can work wonders for teams, who may not have otherwise spent much time discussing process.

When configured properly, the Kanban board can become an invaluable source of performance metrics that can be used to fuel continuous improvement efforts.

Metric
Cycle time

How It Is Used to Fuel Continuous Improvement
Can be used to help teams understand their true capacity, and make adjustments to how work is planned and prioritized

Metric
Lead time

How It Is Used to Fuel Continuous Improvement
Can be used to determine how long it takes teams to fulfill work requests, which can be used to guide improvements to help teams become more predictable

Metric
Throughput

How It Is Used to Fuel Continuous Improvement
Can be used as a rough measure of a team's capacity and productivity, which can be used as a benchmark over time to measure the effectiveness of improvement efforts/td>

Metric
Blockers

How It Is Used to Fuel Continuous Improvement
Can be analyzed to help teams understand where there are internal or external dependencies

Metric
WIP limits

How It Is Used to Fuel Continuous Improvement
Examining these over a period of time can help teams understand where the process is strained and might benefit from additional resources

Adopt These Kanban Principles with Your Virtual Team

When it comes to understanding how team collaboration relates to Kanban principles, it's a symbiotic relationship: Kanban helps teams collaborate better, and better collaboration makes teams

better at practicing Kanban.

High-value collaboration, however, isn't automatic, and it won't happen overnight. It takes conscious and consistent effort from the entire team to make it successful.

But it's worth it: Kanban principles not only help team members understand their individual contribution in the context of the system, but also provide an underlying approach that guides the team in finding ways to work together more effectively.

You can't take the human element out of team collaboration, and Kanban principles don't try. In team-based work, and especially in virtual teams, interactions are often infused with misunderstandings, miscommunication, and competing priorities. Kanban seeks to overcome these challenges by openly engaging team members in ways that help everyone feel informed and accountable.

Learning, practicing, and building upon these Kanban principles in your virtual team can help you reach deeper levels of collaboration than you ever thought possible.

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Rachaelle Lynn, a Certified SAFe Agilist, is a marketing manager and subject matter expert at Planview, a market-leading provider of project portfolio management, lean and agile delivery, project management, and innovation management software. Her experience in diverse B2B and B2C industries continue to drive her interest in the SaaS customer journey. Rachaelle holds a BA in Communication Studies from the University of Florida.

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