Step - 1: Visualise your workflow

Workflow

Decide on the workflow most appropriate for one of the teams in your business (or for yourself if you don't have a team). This should be the set of steps necessary to get a set of tasks done specifically for the team doing the work!

Draw it as a set of steps such as:

Call customer -> Acquire Lead -> Close Deal

Kanban Board

Go to a white-board (if you don't have one use a flip chart or piece of paper for now). Set up the columns for your workflow steps and draw a few rows. This should create a grid to place your tasks in.

You can use 3x5inch cards or post-it notes to write your tasks.

Priorities

Who would assign priorities for getting work done in your team? Do you remember the usual choices and what would influence these choices? Write your answer down in your notes.

Pull system

Think about the different roles in your team(s). Who would pull work across the board? Write it down in your notes as these people will form the Kanban team.