Getting a team up and running with Kanban
A recipe for coaching success

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Introduction

This guide was written to help coaches succeed when their team has decided to use the Kanban framework to manage their work. It is based on lessons learned from dozens of successful Kanban implementations over several years spanning widely diverse types of teams across our enterprise. It is intended to be a general guide, so take liberties with it based on the realities and nuances of your team.

Please see our Enterprise Kanban Community for additional information and resources. For starters, it includes a guide on Kanban Basics.

Summary of Steps

Here are the general steps to follow in getting the team operational with Kanban. One way to capture the following information is for the coach to build an Excel workbook during working sessions with the team. Note that these steps are done in the following order because they build on each other.

1) Deliver proactive communication
2) Establish persistent chat room
3) Define Classes of Service
4) Write Exit Agreements
5) Establish WIP Limits
6) Define reporting requirements
7) Define Roles
8) Create templates
9) Setup new board
10) Test and refine the new board
11) Establish Cadences
12) Write Team Working Agreement
13) Implement new board

Deliver Proactive Communication

If needed, provide a gentle introduction to Kanban so all stakeholders can level set on what it is, where it came from, an example from an active Kanban team, and why it is valuable. Make sure all stakeholders have been proactively informed of this initiative and key target dates along the way. Note: the “gentle introduction” to Kanban is not the formal training session, as that will come later. All steps below provide excellent opportunities for brief, “just in time” training along the way to explain the relevance and value of each setup activity.

Establish Persistent Chat Room

Kanban alone is not a “silver bullet”. The combination of Kanban with a highly collaborative team is the best recipe for a highly successful Kanban team. Therefore, it is imperative that the team has a place to collaborate, even while getting up and running with Kanban.

Our preferred enterprise tool for persistent chat is Microsoft Teams, and a new MS Teams space and channels can be added for a team in a matter of a few minutes.

Capture Baseline Metrics

If applicable, capture key metrics that are anticipated to improve after the team has stabilized their operations with Kanban. These might include the team's Cumulative Flow Diagram, Throughput, Cycle Time, and/or Time to Build (TTB) and Time to Value (TTV) metrics.

Define Classes of Service

Identify the general Classes of Service (a.k.a. "types of work") the team does and define the distinct "workstations" (columns on the board) each type of work goes through on its journey to completion.

Write Exit Agreements

Identify the Exit Agreements for each column: what must be true and measurable about a work object before a team member can pull it to the next column. These Exit Agreements serve as the Definition of Done (DoD) for each column and the Definition of Ready (DoR) for the columns to their immediate right on the board.

Establish WIP Limits

This is among the most vital elements of Kanban, as limiting Work in Progress (WIP) increases a team's performance. A good starting point is to figure that each person should be working on no more than two distinct work objects at any given time, so that can be constrained down to 1.5 X the number of team members working in that column.

For example, let's say there are four developers on the team who will be doing work in the "Development" column (workstation) on the board. The WIP Limit for that column would be set as six (1.5 X 4 developers). Remember, this is just a starting point. Once implemented, the board will show two pieces of information here: the WIP Limit the team has established for the column, and the actual number of work objects in that column. If the actual number of work objects exceeds the WIP Limit for that column, then the team may have a bottleneck that could threaten workflow.
If the WIP Limit is usually exceeded, it may be too high. However, if it is never exceeded, it may be too low.

It is a good practice for a team to monitor and continually refine WIP Limits, and the Retrospective event is a great forum for that review.

Here is our more detailed Practice Guide on Establishing WIP Limits.

Define Reporting Requirements

Who needs to see what information about the team? Who is responsible to provide it? When is it needed? What exactly is done with this information? Leverage the built-in graphical reporting capabilities of the tool and devise a lean reporting strategy on both push and pull communication models. Position reporting as a tool that exposes opportunities for engagement and service to the team. In support of this, the Metrics for Consideration white paper may be useful.

Define Roles

Though there are no prescriptive roles defined within Kanban, it is often helpful to have one person ultimately responsible for managing demand (backlog), such as a Product Owner, and another person to serve the team by facilitating their recurring events, being the single point of contact for blockers/issues, monitoring the team's performance, and initiating opportunities for continuous improvement. This person may be called a FlowMaster, which is an offshoot of the "ScrumMaster" role within Scrum.

All team members should be keenly aware of who the experts are on their team, so no time is wasted in breaking through barriers or enlisting help where needed. Here is a Skills Matrix template that teams can complete to help everyone understand the capabilities the team's customers need this team to have, and who is proficient or interested in each capability (skill).

Create Work Object Templates

Now that the team knows what type of work they do (Classes of Service), the "Tasks" tab on the Excel workbook can be completed and templates can be constructed in the work management system (like SwiftKanban or Rally) accordingly.

Additionally, the Practice Guide on Effective Task Management for Agile Teams might be useful as you construct work object templates.

Setup New Board

Armed with the above information, it's time to actually setup the new board in the tool of choice (e.g., Rally or SwiftKanban). In Rally, the Team Board is preferred over the Kanban Board, since the Team Board's columns (workstations) can be customized.

Test and Refine New Board

Create a mock work object using each type of template created in the tool, and simulate with the team how each work object would flow across the board. This is an opportunity for team members to practice how they will move work across the board on a PULL basis (i.e., as each team member has immediate capacity to either start a new body of work or reach out to team members to check for swarming opportunities. These work object movement guidelines will ultimately be documented in the Team Working Agreement that is written in a later step below.

Make refinements to things based on discoveries made as you test the new board.

Establish Cadences

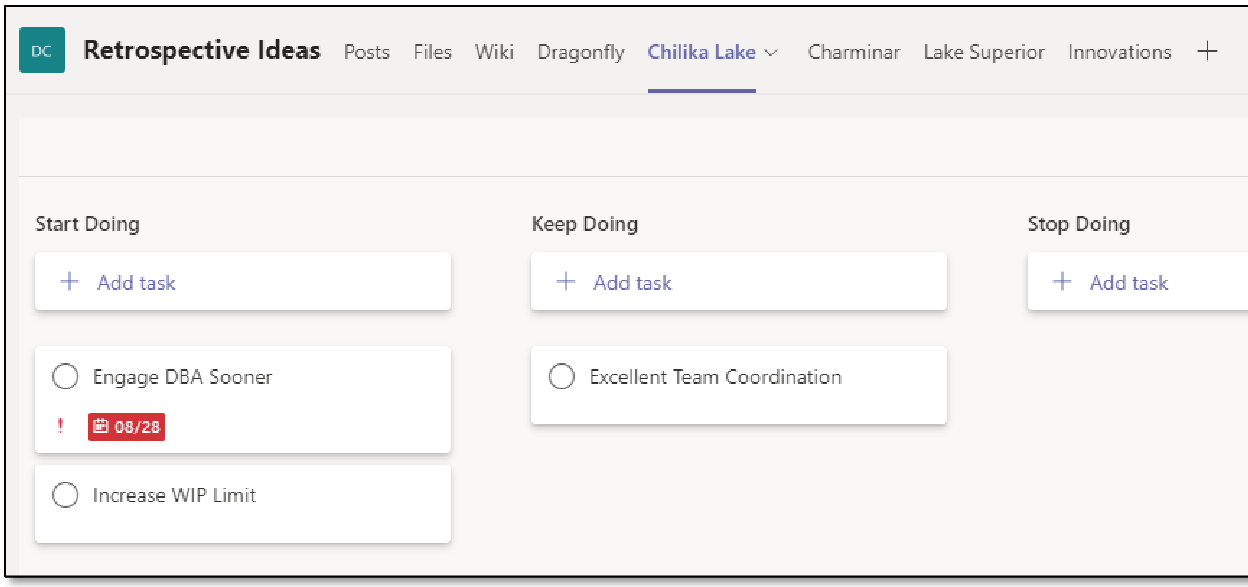
Key Kanban "Cadences" (recurring ceremonies or events) include the following, for starters:

Event	Frequency	Facilitator
Daily Stand-up	Daily	FlowMaster
Retrospective	Bi-weekly	FlowMaster
Refinement	Weekly or as needed	Product Owner or equivalent
Review	Bi-weekly	Product Owner or equivalent
Deployment Planning	As Needed	FlowMaster
Others?		

Establish Retrospective Framework

The most vital element of the retrospective ("retro") is that the team has a way to capture their ideas as soon as they have them, as it is not effective or productive to have team members get to a retrospective session and try to remember all the great ideas they have had since the last retrospective session.
If needed, help the team setup a framework for managing Retrospective ideas, so the FlowMaster can simply show and update it in each Retro session.

There are many tools that can be used for this. Here is a snapshot of a Microsoft Teams-based framework that uses the simple "**Planner**" app from within the team's persistent chat room:



Write Team Working Agreement

[Here is a template](#) created for Kanban teams.
The Team Working Agreement (TWA) is valuable on two fronts: it helps the team discuss and forge their commitments to each other as they begin working as a Kanban team, and it serves as a vital artifact for stakeholders and new team members on an ongoing basis.

If the TWA gathers dust and disconnects from the realities of team operations, it will lose its value. Thus, a good practice is to position it as a living document and encourage the FlowMaster to include a review of the TWA in each bi-weekly Retrospective session, so the team can update it to reflect changing realities.

Implement New Board

Now it's time for the team to start using the live board and start creating/moving work objects across it based on their real operations.
Nuances will arise that should lead to refinements to templates, tasks, Exit Agreements, WIP Limits, and possibly even the Team Working Agreement. Make sure everything stays updated and in sync.

Deliver Kanban Training

There has been much written by neuroscientists and training experts on how the human brain most effectively learns: by visual examples and practice…followed by theory. We don't get a master's degree in physics before learning to ride a bicycle!

In support of this, formal Kanban Training is purposefully deferred to the point shortly after the team has gone through all the above activities. Training should include plenty of exercises and discussions designed to strengthen engagement and reinforce lessons.

In our experience, delivering training at this point in the team's Kanban journey has resulted in significant enthusiasm as "aha!" moments occur, and the team starts connecting their practices with theory.

Take Checkpoint on Baseline Metrics

After a month or so of real Kanban use, capture key metrics and compare them to baseline metrics that were captured at the beginning of the team's Kanban journey. For new teams this will not be possible.

Ideally, there should be observable improvements in the Cumulative Flow Diagram, Throughput, and Cycle Time. However, it the team has not yet stabilized, these numbers may have gone the wrong direction. In that case, you'll need to do this again at a reasonable future point.

Participate in team events

Since the team may be new to the recurring events, it is vital that the coach participates in them to provide guidance, answer questions, and do "just in time" training as needed. Set expectations for stakeholders by letting them know that your engagement in these sessions is temporary and may feel a bit encumbering, but that will be temporary.

Pay special attention to how the team's sessions might be optimized because of Kanban. For example, the Daily Stand-up's focus is on the work objects, not individuals. This yields a more intuitive and product-based focus as the team gets work to done.

Schedule retrospective

This is a vital conversation so the team can discuss their Kanban transformation journey: what worked well and what could have been better. Use this input to improve your next Kanban engagement.

Write case study/success story/Bravos for team members

Who else might like or need to know of your success with this new Kanban team? You may want to write a brief case study or success story (here are examples of a Case Study and a one-page Success Story).
Make sure to write Bravos for the team members who were courageous enough to participate in an initiative that required courage, strong engagement, a positive attitude, and the learning of new ways to get things done!

Appendix

Additional Resources

UHG Kanban Center of Excellence

Enterprise Kanban Community in MS Teams

Key Terminology

Templates

Case Study

Books – see the "Additional Resources" section at the bottom of this Kanban Basics Practice Guide.

Training – There are two ongoing Kanban classes. One uses Rally (in support of OSAM) and the other uses SwiftKanban. For the OSAM class, search for "Intro to Kanban" in LearnSource. For SwiftKanban, contact Mark Celli.

Here are some of the most common myths associated with Kanban, and the facts behind each.