Starting Kanban

The 8-Part Plan to a Better Way to Work.

HUGE
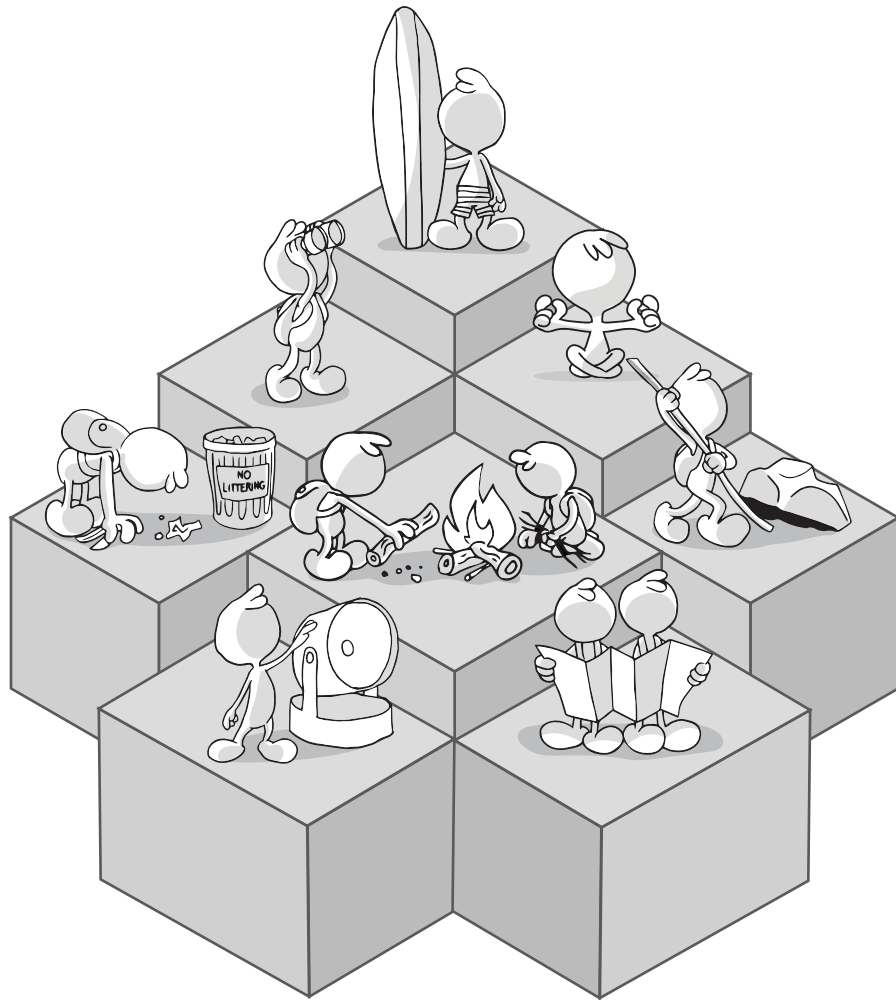
This Workbook belongs to:

_____

If lost, please contact me at:

_____

HUGE ⚬

Our mission is to help create amazing workplaces by keeping teams safe on the inside and customers delighted on the outside.

About the Trainer

BRENDAN
WOVCHKO

THE TECHNOLOGY INDUSTRY'S TRUSTED VOICE ON BUSINESS AGILITY, Brendan Wovchko, is an expert in helping businesses overcome delay. His company, HUGE IO, has popularized the message of favoring finishing over starting. Wovchko is known for his passion for making complex management techniques easy to understand—earning him the reputation as a highly sought-after communicator of the Kanban Method.
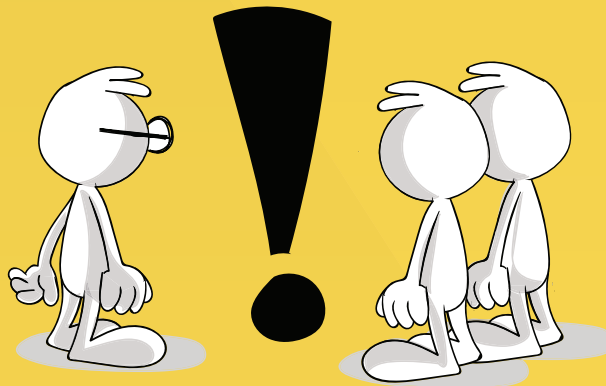
BRENDAN WOVCHKO | TRAINING@HUGE.IO | HTTPS://HUGE.IO/ | @HUGEIO

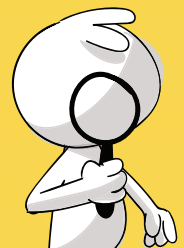**HUGE ○**

Introduction to Kanban

Improvement usually means doing something that we have never done before.

—Shigeo Shingo

☑ OBJECTIVES

✔ Get a quick overview of the **basics**
✔ Profile the **mindset** of a team using Kanban
✔ Use **story** to expose the real problem at work
✔ Understanding the stakes when Kanban is your **plan**

BASICS

Kanban is a set of organization principles and practices that clarify how to _____ work and _____ its flow.

A Kanban card is a fast way to _____ the work that needs to be done.

A Kanban board is a simple way to communicate _____ that everyone understands.

MINDSET

You don't have to _____ working to start Kanban.

Start with what you do _____. Kanban is a no-overhead _____ that fits atop how you work today.

Kanban favors _____ over transformation.

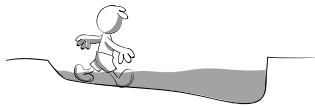Kanban manages _____, not _____.

Kanban relieves _____.

Kanban favors _____ over _____.

STORY

The elements of "problem" in any story.

- _____

- _____

- _____

- _____

_____

_____   _____

SAFE: **SAFE:**

_____   _____

_____   _____

_____   _____
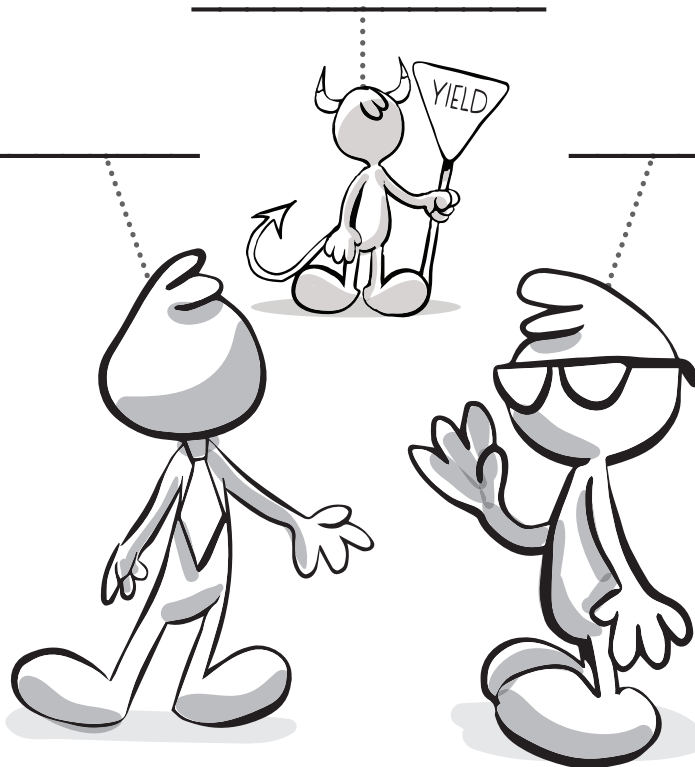
VULNERABLE: **VULNERABLE:**

_____   _____

_____   _____

_____   _____

IMPOSSIBLE:

_____

_____

_____

Delay: A period of time by which something is

_____.

What are common types of delay?

_____, _____,

_____, _____.

Delay prevents you from doing the_____ you love,
enjoying the_____ you do it with, and feeling
a sense of _____.

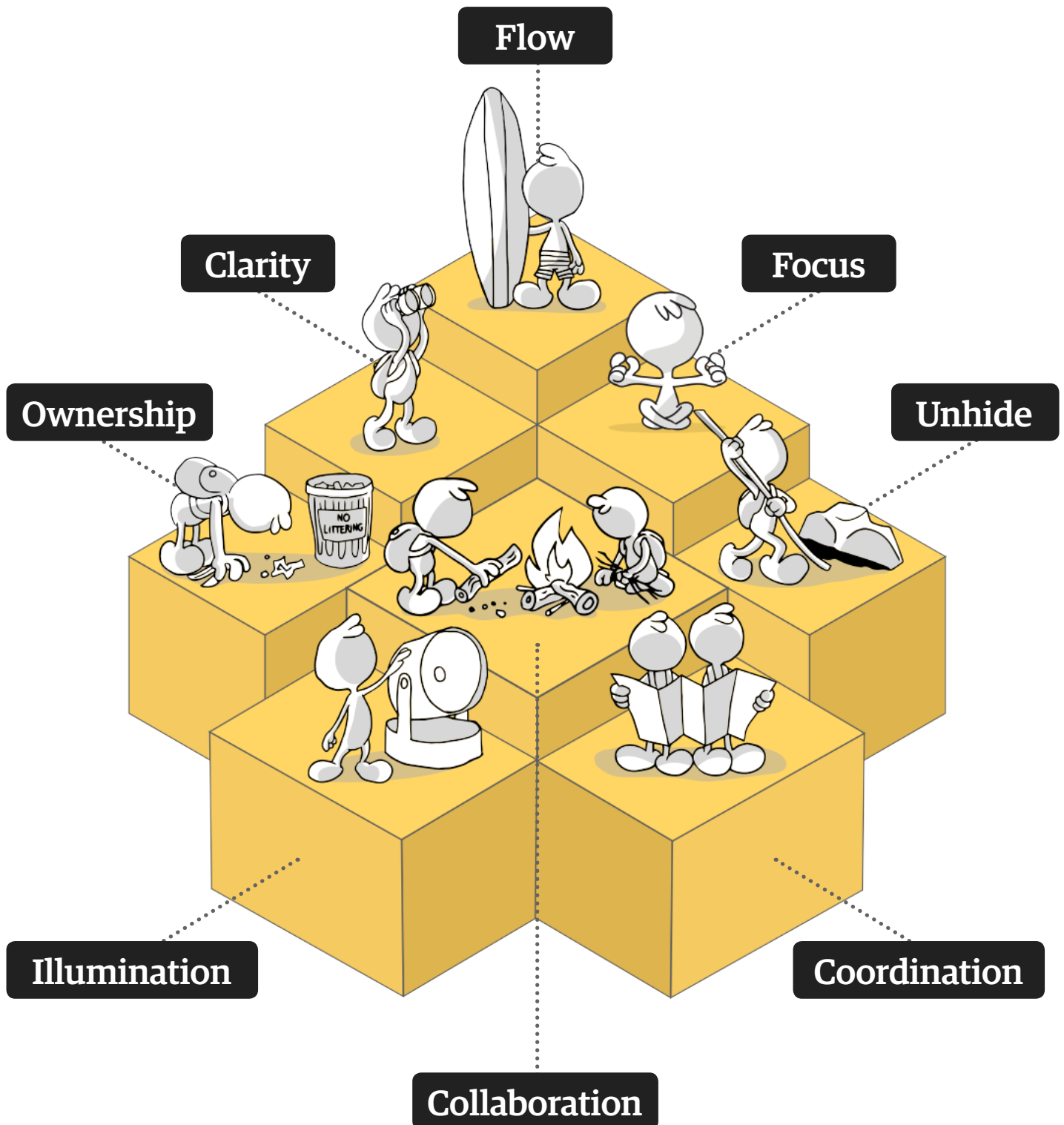## Outsmart the _____ that create _____ by achieving _____.

Success:

✔ Make the game of business easier to win.
✔ Put the joy back in making things.
✔ Make work a happier place.

Failure:

✘ A no-one-wins culture forms.
✘ Low pride in what you make.
✘ Overburdening gets worse.

THE 8-PART PLAN TO
A BETTER WAY TO WORK

Flow

Clarity

Focus

Ownership

Unhide

Illumination

Coordination
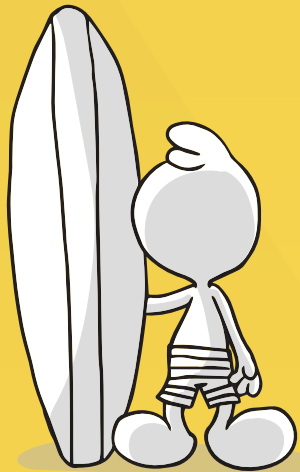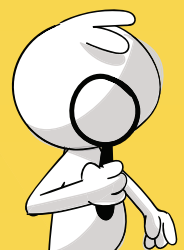
Collaboration

Flow

If you optimize for efficiency, you'll get gridlock. If you optimize for flow, you'll get efficiency.

—Jon Terry

☑ **OBJECTIVES**

✔ Reveal the single metric for measuring flow
✔ Why true agility matters
✔ Uncover your team's flow potential

METRICS

When asked to increase efficiency, teams typically respond by working harder and longer.

Flow is the active _____ of every successful team.

📢 DISCUSS

What could Southwest measure to cause their team to make pro-growth decisions? _(with their discretionary time.)_

What metric could be used similarly for knowledge work teams?

Do your daily activities create more value or more delay?

What is the average Flow Efficiency?

AGILITY

Improve the _____ system, not just the parts in which you are most frequently involved.

Agility is about _____ _____.
Make better decisions and reduce operational costs.

POTENTIAL

🧩 ACTIVITY

Use the worksheet on page 13.

📢 DISCUSS

Are you happy with your score?

How has the quiz changed your perspective?

Want to put what you've learned into practice? Jot down your biggest takeaways from this lesson on page 50 of your workbook.

HUGE ⊖

Flow Potential Quiz

True False

_____ _____ Our team is highly trusted within the organization.

_____ _____ We measure the amount of delay in our workflow.

_____ _____ I'm rarely interrupted to work on something different.

_____ _____ It's uncommon for me to juggle multiple priorities.

_____ _____ All of our work is visualized where anyone can see it.

_____ _____ Our work is decomposed into small, quickly achievable units.

_____ _____ The description of what I'm doing rarely changes while I'm doing it.

_____ _____ Meetings are collaborations, not status updates.

_____ _____ It's unusual to feel overburdened at work.

_____ _____ I'm more focused on my successes then what remains undone.

HUGE ⊖

Flow Potential Quiz

Total False: _____

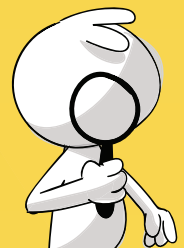|	
0-1	**Ready for advanced curriculum.**
2-4	**Improvement needed.**
5+	**Significant need for improvement.**

Clarity

The price of light is less than the cost of darkness.

—Arthur Nielsen

☑ **OBJECTIVES**

- ✔ Learn a simple approach to **visualizing** work
- ✔ **Clarify** the importance of making workflow known
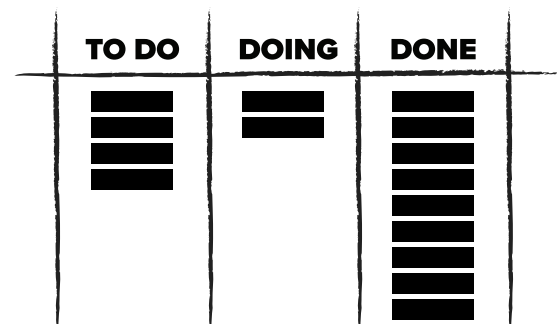- ✔ Understand how **risk** and prioritization are interwoven

WORKFLOW

Successful teams can clearly identify the _____ they perform to _____ _____. Strung together, those activities comprise a workflow.

A well-defined activity has a clear _____ and _____.

Activities are often collaborations between _____ and _____.

BOARDS

TO DO	DOING	DONE

The board visualizes activities, workflow, and the status of work.
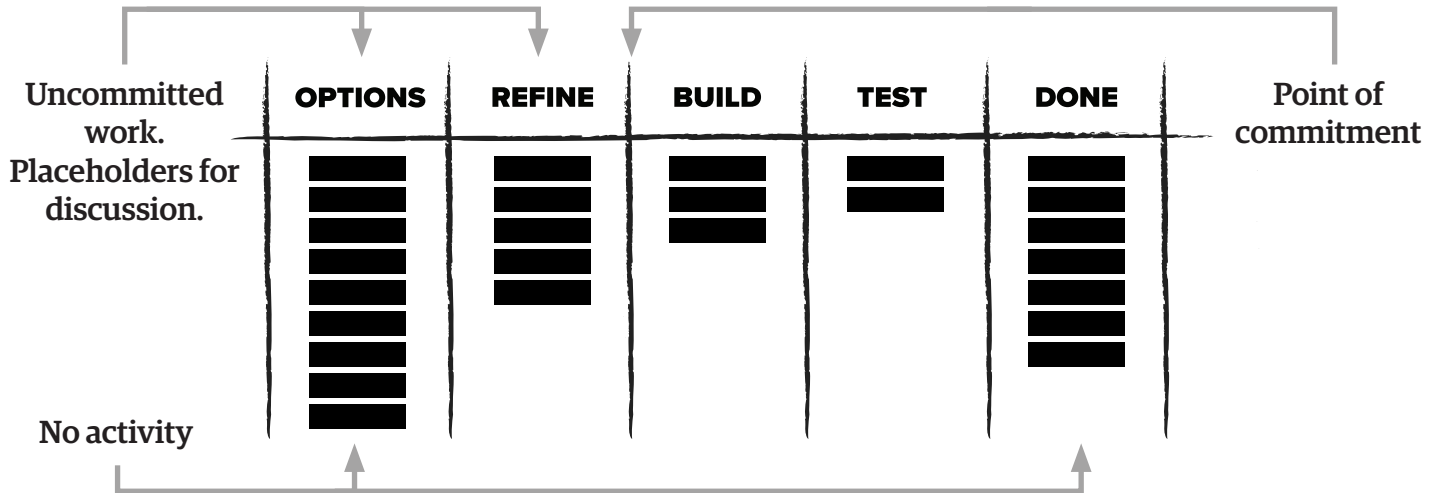
 DISCUSS

What do we know just by observing this board?

A board is a_____-_____ device.

COLUMNS

The dominant activities in a workflow that clarify the states of cards.

Uncommitted work. Placeholders for discussion.	OPTIONS	REFINE	BUILD	TEST	DONE	Point of commitment

No activity

Columns are not waterfall stage-gates. Individual cards move across the workflow individually, without _____.
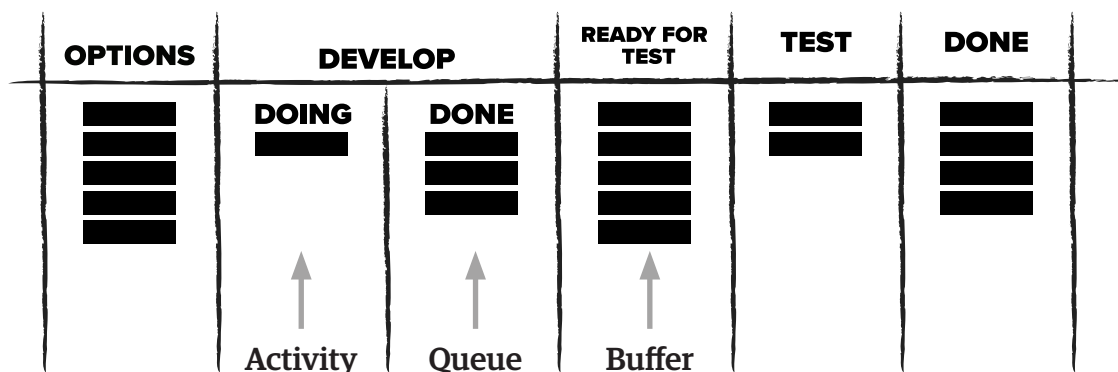
Considerations for creating and naming columns:

- _____-_____ naming.

- Use _____ names.

- Don't be _____.

Column Types: *Not all columns are created equally.*

OPTIONS	DEVELOP		READY FOR TEST	TEST	DONE
	DOING	DONE			

Activity   Queue   Buffer

Queues hold work that are _____ for the next activity.

Buffers are sometimes used to _____ an activity from _____. They can also bring clarity to work that skips columns.

Cards never move backward in a workflow. A card should be marked as _____ until help is received from other activities.

Workflow is _____ discovery.

✦ ACTIVITY

Using the worksheet on the next page, design a workflow for a real-life situation you have today.

Want to put what you've learned into practice? Jot down your biggest takeaways from this lesson on page 50 of your workbook.

HUGE 10

Design a workflow for work you do today.

HUGE IO

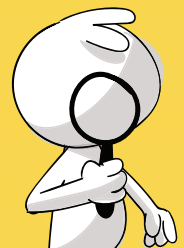**Design a workflow for a real-life situation you have today.**

Focus

It's only the last turn of a bolt that tightens it, the rest is just movement.

—Shigeo Shingo

- ✔ Why **associations** hold us back from making positive change
- ✔ Understand the impact of **interruptions** on productivity
- ✔ Explore the effect of **multi-tasking** on quality
- ✔ Embrace the power of favoring **finishing** over starting

ASSOCIATIONS

The human brain makes _____ with everything.

Busy means I'm _____.

INTERRUPTION

✦ ACTIVITY

After finishing the game on the next page (front and back), complete the questions below:

Which round was more stressful? Why?

On which round did you make more mistakes? Why?

What was most difficult about Round 2?

Does this game reflect how you often work?

Interruption is a two-hour trip in a _____ _____ and a two-hour trip _____.

Saying "_____" to one thing is simultaneously saying "_____ _____ _____" to many things.

Chaos is valuing _____ over _____.

> *There's an epidemic of interruption.*
> —JASON FRIED

HUGE ○

Context Switching Game

Complete the <u>odd</u> pattern <u>one column</u> at a time.

I	A	1	Woodchuck
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	

Number Completed: _____

HUGE ⌾

Context Switching Game

Complete the <u>odd</u> pattern <u>one row</u> at a time.

I	A	1	Woodchuck
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	

Number Completed: _____

MULTI-TASKING

DISCUSS

What is their emotional state?

Are they aware of their assignments?

Is work getting done?

Is work piling up?

To Do   Doing   Done
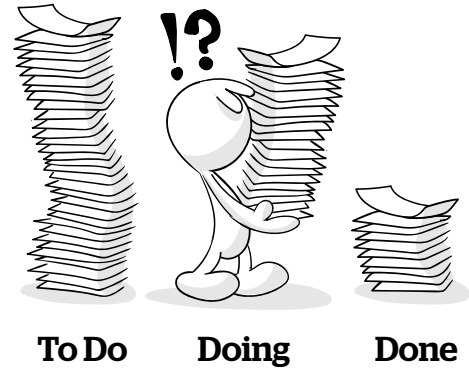
Zeigarnik Effect:

The brain only remembers what is incomplete. People experience less executive burden on the brain when they can finish one thing before starting the next.
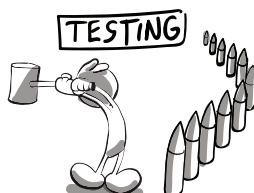
Multi-tasking impacts disciplines differently.

_____ personalities are empowered with laser focus.

_____ personalities work best with a handful of things at once.

Despite some people preferring focus, their work rarely allows it.

FINISHING

Limiting Work in Progress

Work that flows consistently produces higher output.
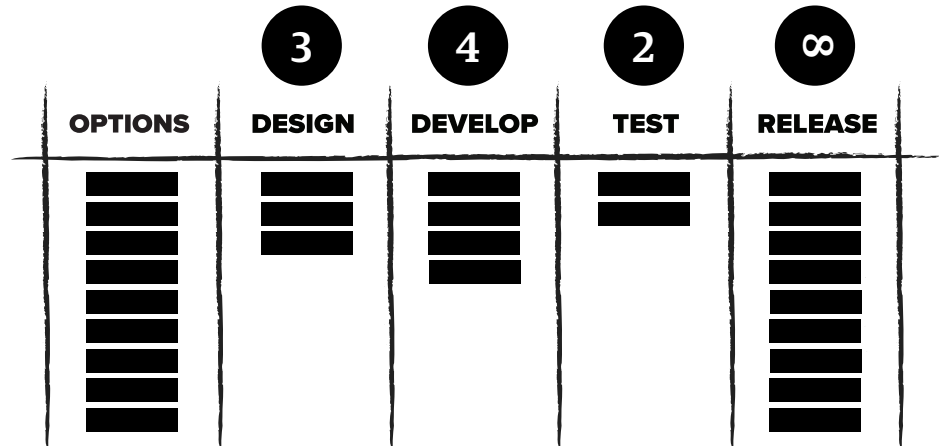
WIP Limits:

- Are a cap, not a quota.
- Apply to cards, not people. Multiple people can work on one card simultaneously.
- WIP Limited columns are bounded. Infinity or unmarked columns are unbounded.

Be cautious of over-assignment.

Little's Law:

- If the team isn't busy, do more.
- If the team is overburdened, do less.
- In both cases, the team will increase output.

Stop starting and start finishing. A decision to start is a decision to finish. Favor finishing over starting.

WIP Limits are an enabling constraint.

📢 DISCUSS

Is unlimited WIP an **additive** problem or an **exponential** problem?

Should WIP Limits be increased because of high demand?

How often can WIP Limits be changed?

Why would you increase a WIP Limit?

Is it okay to not have a WIP Limit on a column?

Does the speed at which an individual works impact how much they can do at one time?

What consideration should be made when someone works across multiple columns?

Considerations when setting WIP Limits:

- Ask your team what they can _____.

- Number _____ per activity.

- Impact on _____ and quality.

_____ , flow, <u>and</u> quality.

ANSWER KEY

Associations
(Insert Your Own Answer)
New Direction
Back
Yes
Not Right Now
Activity
Results
Analytical
Creative
Handle
People
Happiness

Ownership

Never mistake motion for action.
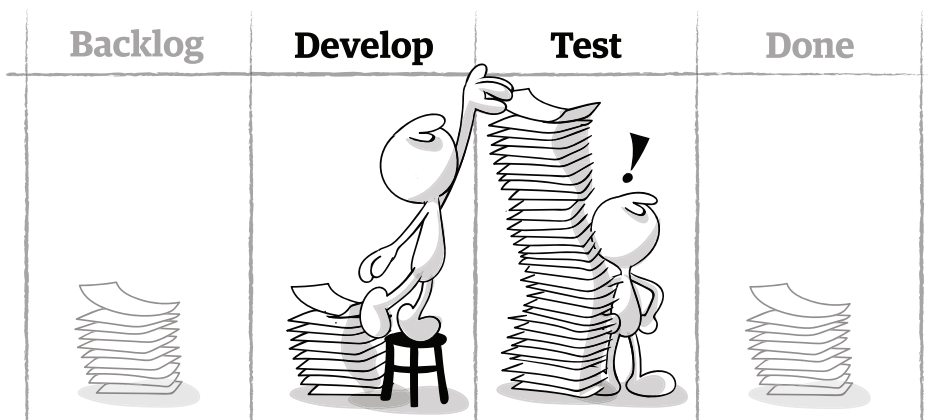
—Ernest Hemingway

NO LITTERING

☑ OBJECTIVES

✔ Unlocking behavior change requires **motivation** to be understood

✔ Changing **perspective** from narcissist to systems thinker

✔ Moving from a push mindset to a **pull** system

MOTIVATION

Backlog	Develop	Test	Done
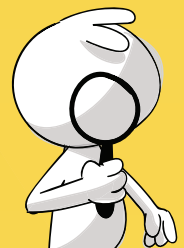
DISCUSS

Is the developer causing a problem?

Is it intentional?

Is it malicious?

Does this only happen between developers and testers?

What is motivating this developer?

All makers have growth-driven _____.

APPROACH

Beware of the bubble of no ownership!

Work can be _____ to everyone and
_____ by no one.

PULL

What is the primary function of an automobile?

You cannot reduce delay if you are not actively _____ it!

Work exists in four states:

_____, _____,

_____, _____.

A common source of delay is when work is waiting for the next activity to occur. That work is called _____.

Insert an interrupter: "I'm _____ and I'm waiting for this work to be _____ from me."

Pull System:

- The only way work moves is if someone pulls it
- Team members are always communicating availability
- Cards are never lost because they always have an advocate

A pull system is an _____-driven system. It's a game changer for project managers.

Insert a second interrupter: Look for opportunities to _____ _____.

Pull System + WIP Limits = _____
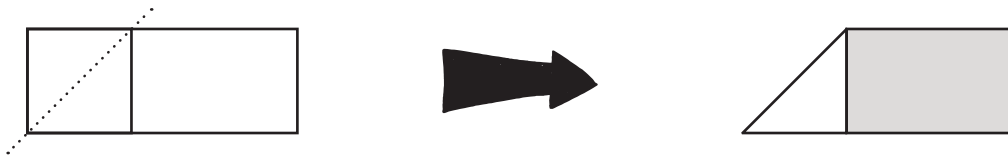
_____

HUGE ⚇

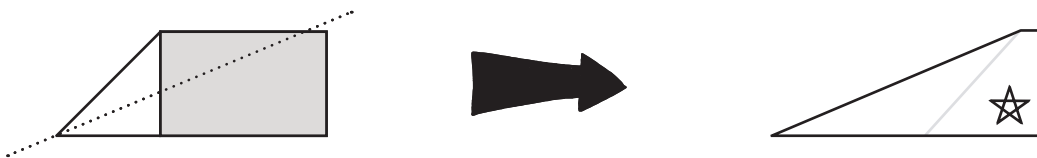## Paper Airplane Game

Position 1

Fold in half.
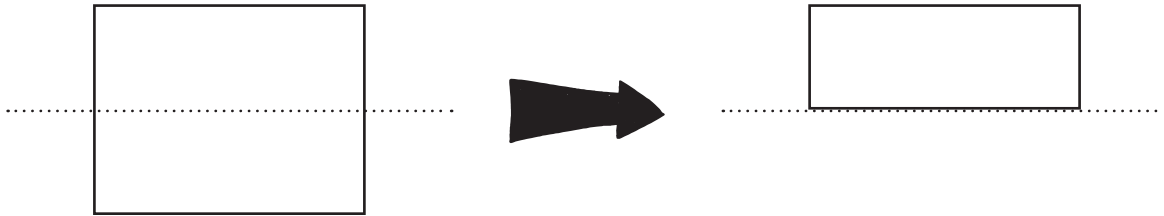
Position 2

Fold left corner down on each side.

Position 3

Fold same corners again to make wing.
Draw a star.

Position 4

Fold each wing again to streamline.
Put in "Done" pile.

HUGE ⊙

Paper Airplane Game

Manager Metrics

Round	First	Total	Incomplete
1	: _____	# _____	# _____
2	: _____	# _____	# _____
3	: _____	# _____	# _____
4	: _____	# _____	# _____

🧩 ACTIVITY

Complete the questions below after finishing each round of the game on the previous page.

After Round 1:
Will you produce more in round 2?

After Round 2:
Did you feel more or less busy in round 2?

Did you feel more or less stressed in round 2?

Did the system normalize to compensate for the bottleneck?

Did waste decrease?

After Round 3:
What strategy did you use to eliminate waste in round 3?
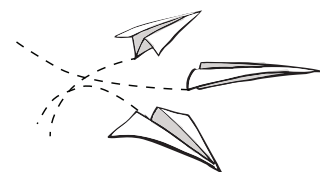
Did changing WIP Limits improve flow?

After Round 4:
Did you resolve the bottleneck in round 4?

How did communication evolve throughout the game?

Is there a relationship between the trust to self-organize and an improvement in flow?

Round 4 is a demonstration of change managed well. Principles were taught and exercised, and trust was given.

Underway and *Pullable* are the two states that facilitate a pull system.

_____

Pull systems ensure that people are available to combat _____.

_____

Tips to get the most from a pull system:

- Don't _____ or _____-_____ work.

- Read the board from _____ _____ _____.

- Explicit, _____ communication is a must.

- Replenishment is the only _____-_____.

_____

DISCUSS

Do smart flow decisions increase or decrease learning and growth?

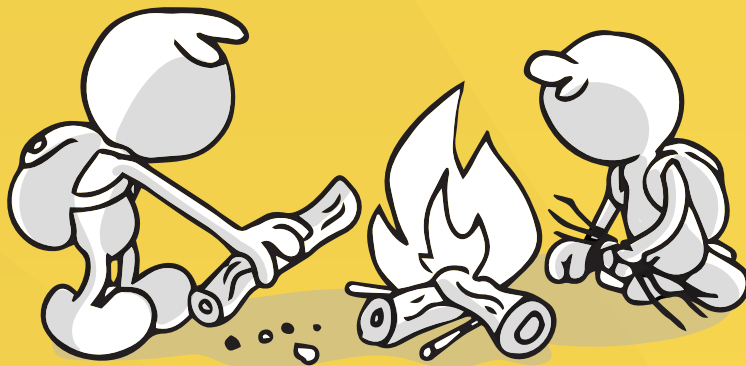Should you ever pull work before you are ready to start it?

Want to put what you've learned into practice? Jot down your biggest takeaways from this lesson on page 50 of your workbook.
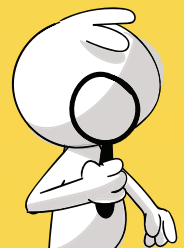
Collaboration

If everyone is moving forward together, then success takes care of itself.

—Henry Ford

✔ Achieving flow requires the mastery of swarming

SWARM

A decision by an individual or group to optimize flow.

The objective of a swarm is to improve _____.
It is not an _____.

Swarming helps team members _____
_____ _____ and makes the team stronger.

Specialization feeds a need for **_significance_**.

_____

Circumstances that might justify a swarm:

- Card is owned by an _____ team member.

- Card is _____, _____ _____,
  or _____.

- Column is _____ or _____.

- WIP Limit is _____.

A card that remains in one column too long is _____.

_____

A card that has a due date that starts late or is started on
time and may be delivered late is _____.

_____

The _____ is the part of the process
that defines the throughput of the rest of the process.
Everything moves at the speed of the bottleneck.

Unmet capability is called _____.

An unfinished dependency, defect, or unavailable skill set may _____ a card.

📢 **DISCUSS**

How do you know if your team has systemic blockers?

Can a card be both blocked and pullable?

Do pullable cards consume WIP Limits?

Do blocked cards consume WIP Limits?

_____   🔱 EIGHT HATES

Avoid context switching when choosing a time to swarm:

- At the start or end of the day

- Before or after lunch

- After daily stand-up

- Prior to pulling a new card

SLACK

You have slack if WIP Limits are _____
and you are _____ to swarm:

- Starvation or bottlenecks

- Blocked, stale, or risky cards

Bring _____ to your slack time!

The team should maintain a repository of things to do during slack time.

The worst thing you can do is _____ something to start! Don't _____ people during slack time.

The impulse to _worry_ compels people to make decisions they know negatively impact flow.

Want to put what you've learned into practice? Jot down your biggest takeaways from this lesson on page 50 of your workbook.
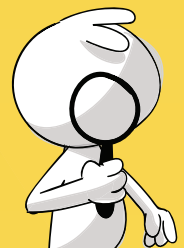
Unhide

High-integrity accuracy is better than low-integrity precision.

—Brendan Wovchko

✔ Understand the impact of missing, perfect, vague, and big work

DISCUSS

In what ways can work be hidden?

MISSING

What percentage of your work is missing?

PERFECT

"Perfection is the lowest possible standard." **—TONY ROBBINS**

VAGUE

High-performing teams have a consistent approach to
_____ _____.

BIG

Ideas can be_____, work should be _____.

The bigger the idea, the more _____.

Do the estimation and throw away the _____.
The value of estimation is not the estimate, it is the
_____.

Want to put what you've learned into practice? Jot down your biggest takeaways from this lesson on page 50 of your workbook.
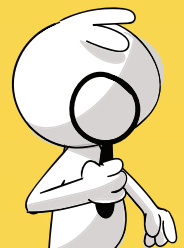
Illumination

High-integrity accuracy is better than low-integrity precision.

—Brendan Wovchko
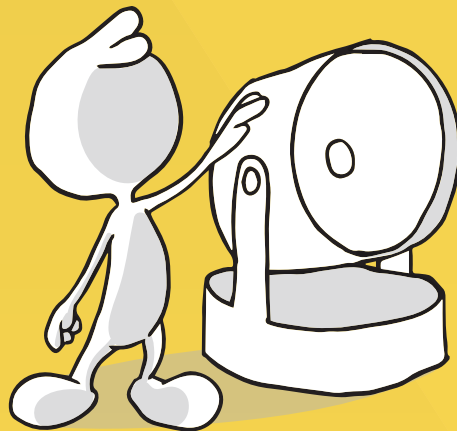
☑ **OBJECTIVE**

✔ Using policies and sequence to make what needs to happen clear

RISK

_____ project management treats all work homogeneously. Work is often (unnecessarily) driven by _____ _____.
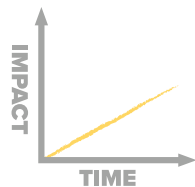
The need for _certainty_ drives people toward the overuse of deadlines.
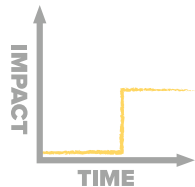
CLASS OF SERVICE

Kanban prioritizes cards using _____ and _____. This is called Classes of Service.
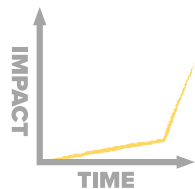
Common Classes of Service:

Standard
The card has identifiable business value but has no specific timeframe for delivery.

Fixed Date
The card diminishes in value or impact or increases in cost after a specific date. Often driven by regulation, contract, or season.

Intangible
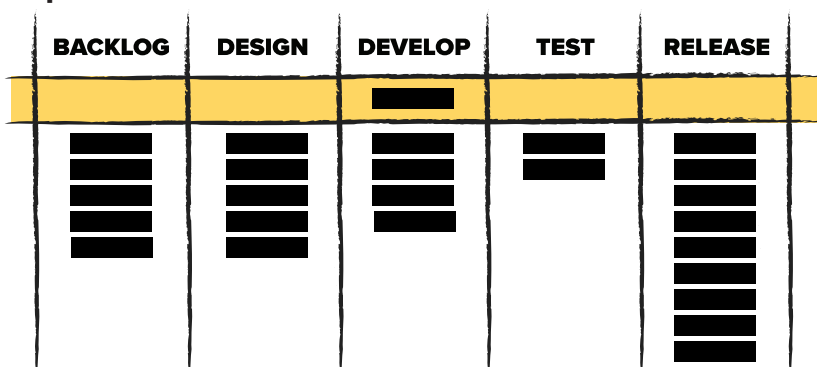The card does not appear to have a direct business value or delivery timeframe but has important risk implications. Costs may eventually increase.
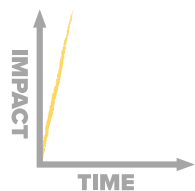
Expedite
The card has immediate value and costs increase dramatically with every passing hour with no end in sight.

Expedite Swim Lane:

BACKLOG	DESIGN	DEVELOP	TEST	RELEASE

When a card enters this swim lane, the team focuses on it until delivered.

Expedite from a first-person perspective: If a card requires a _____ _____ away from my current work, I have an expedited card.

📢 DISCUSS

How do we make an expedited card visible?

How does an expedited card impact WIP Limits?

How is an expedited card prioritized?

How is an expedited card estimated?

Define clear policy to regulate the use of expedite. Ex:

- Interruption in _____.

- Security _____.

- Violation of a _____ or _____.

Some teams have a "_____ _____ _____" policy for expedited work.
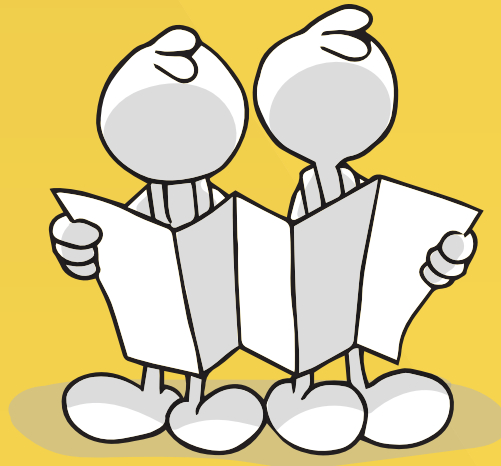
_____

Want to put what you've learned into practice? Jot down your biggest takeaways from this lesson on page 50 of your workbook.

Coordination

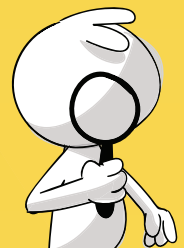*You can succeed best and quickest by helping others to succeed.*

—Napoleon Hill

✔ Cure stale stand-ups with **Kanban Meeting** and the Ask Kanban game

✔ Ensure the team always has what it needs with the **Replenishment Meeting**

Kanban refers to routine meetings as _____.

👎 *Narcissism:* When personal performance is more important than serving the customer and team success.

👎 *Status Meeting:* When one person is checked in and everyone else is checked out.

KANBAN MEETING

Objective: A 15-minute stand-up meeting for a team to establish their daily plan and find opportunities to improve flow.

Atmosphere: What can we finish today?

Biggest risk: Kanban meetings will quickly become stale if the team treats them like a traditionally executed stand-up.

Basics:
- Team participates, anyone may observe
- No leader, consistent member of the team sets up
- Every day, preferably first thing
- Often time-boxed to 15 minutes

Accelerants:
- Everyone is curious, empathetic, and open-minded
- Occurs while standing in front of a Kanban board
- Everyone is engaged in systems thinking
- An intense focus on collaboratively finishing
- Probing conversations about flow
- Action oriented conversation
- Using the "parking lot"

Distractions:

- Topics discussed that are not related to cards on the board
- Held for the facilitator to get, "in the know."
- Monologues, interruption, or domination.
- More than one conversation.
- Board is too complicated.
- Individual status updates.
- Detailed problem solving.
- Starting late

📢 **DISCUSS**

Who facilitates the gathering?

When is the stand-up too big?

Is it inefficient to go to multiple stand-ups?

When should the team cancel the Kanban Meeting?

When can I skip attending the Kanban Meeting?

What if I'm assigned more than one card?

Is it okay to ask about other people's cards?

Do cards ever skip columns?

REPLENISHMENT MEETING

Objective: A routine gathering to get feedback from key stakeholders on what the team is about to start and discuss metrics that help manage delivery expectations.

Atmosphere: Leaning toward action and agreement, not seeking approval or validation.

Biggest risk: Stakeholder meetings are infamous for drifting off track. Protect the agenda.

Product Manager: Acts as organizer and chief stakeholder but may be overridden by popular vote.

Basics:

- Product Manager + Stakeholders
- Emcee'd by Product Manager
- Once per iteration
- One Hour

Agenda:

- Recap what was discussed during last gathering
- Where we are now and what we've learned
- Identify blockers
- Review what's up next
- Agree on priority and sequence

Distractions:

- Strategic or big picture discussions
- Discussing work currently in progress
- Trying to make commitments without team input
- Absentees attempt to influence decisions post   mortem
- More than one conversation
- Monologues, interruption, or domination
- Poor time management
- Restarting discussions for late-comers

Want to put what you've learned into practice? Jot down your biggest takeaways from this lesson on page 50 of your workbook.

Recap

What sources of delay have we identified?

INSTINCTS

Efficiency ➜ Flow

Batch ➜ Independent

Busy ➜ Limit WIP

Push ➜ Pull

Significance ➜ Swarm

Worry ➜ Slack

Perfection ➜ Unhide

Certainty ➜ Risk

Narcissism ➜ System

Status ➜ Finishing

EIGHT HATES

- Pullable
- Starved
- Preassigned
- Specialized
- Stale
- Risky
- Blocked
- Unemergencies

*You can observe a lot just
by looking.*
—YOGI BERRA

Action Plan

Write your takeaway from each section and one action item for each takeaway.

	KEY TAKEAWAY	ACTION ITEM
FLOW		
CLARITY		
FOCUS		
OWNERSHIP		
COLLABORATION		
UNHIDE		
ILLUMINATION		
COORDINATION		

Takeaways

Takeaways

Takeaways

Takeaways

Takeaways