



Kanban

Optimize your task flow by
**Visualizing your task
Progression**

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So... What's a Kanban?

Conceived by Toyota engineer Taiichi Ohno, Kanban was implemented in 1953 to fix the problem of overproduction for Toyota. With its inspiration taken from the grocery store model, Kanban runs on the premise that one only needs to restock an item on their shelf once it has run out. Thus, only having enough “parts” to meet the customer’s needs.

“So, that analogy is great and all, but what on earth does it have to do with my project?”

Relax, we’re getting to that



Assembly Line Process



Assembly Line Process

Thinking of Kanban like that Toyota assembly line, all of the necessary parts to complete the project are mapped out visually. When you see a part that is ready for you to work on, you can complete your part and pass it on the next phase of production. While simultaneously, everyone else involved in the project is working on their parts and sending them along the production line as well. Thus, **you are able to see all parts of a project by their task stage and work on only the ones which pertain to you as soon as they are ready for your attention.**

Getting any easier to understand? Let's make it even more simple: think, post-it notes.

As Easy as a Post-it

The perfect tool for pictorial/visual minded individuals, Kanban has the ability to **let you see your project unfold in a real, status based view, rather than a chronological timeline** (Gantt Chart) or waterfall view. Like this post-it note board, your virtual Kanban board is separated into stages, most simply, some variation of "assigned", "in progress" and "complete"



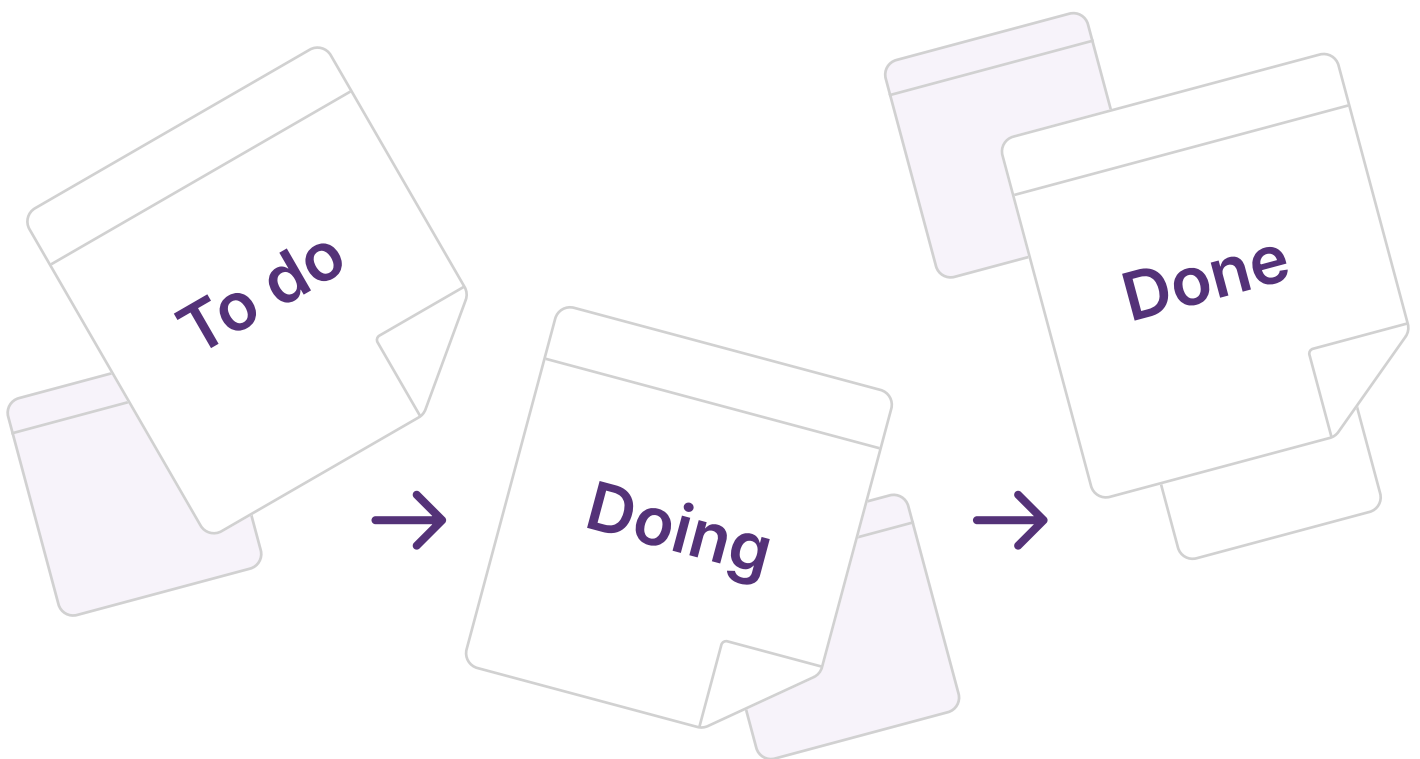
Board = Project
Task = Cards



Board = Project. Task = Cards

The board will represent a specific project and you can see that there are a number of tasks that need to be completed within the project. Each task is like the sticky note, a card, as PM lingo calls it. The card is its own entity which can be moved from stage to stage, separate from the project as a whole, as it is being worked on. **The best part is that the completion of one task will affect all dependant tasks.**

Meaning, a task can only be worked on once its dependencies have been completed and parent/child tasks affect each other's timeline so that the project is always being accurately updated no matter who is working on which task.



Think Pull, not Push



Think Pull, not Push

Kanban is a “lean methodology”. What does that mean? To be as simple as possible, lean project management is focused on delivering greater value with fewer wasted resources. One of the key features of lean project management is to use pull production as opposed to push production.

The board encourages its users to pull new work into the system when there is the capacity to handle it. **This means that new tasks are not pushed into the project based on demand, but rather pulled in based on available resources.** The number of cards in circulation is equivalent to the capacity of the system; the readiness of team members to take on more work. Thus, the system cannot be overloaded and your team should not be overworked.



Eliminate the Waste

Eliminate the Waste

Not that kind of waste! When we talk about waste in collaborative work environments, we are talking about wasted resources - people, budget and time. Essentially, **Kanban has the ability to eliminate ineffectiveness by keeping priorities and process clear.** There is far less stress and “project waste” when each task in front of you is being presented on an as-need basis.

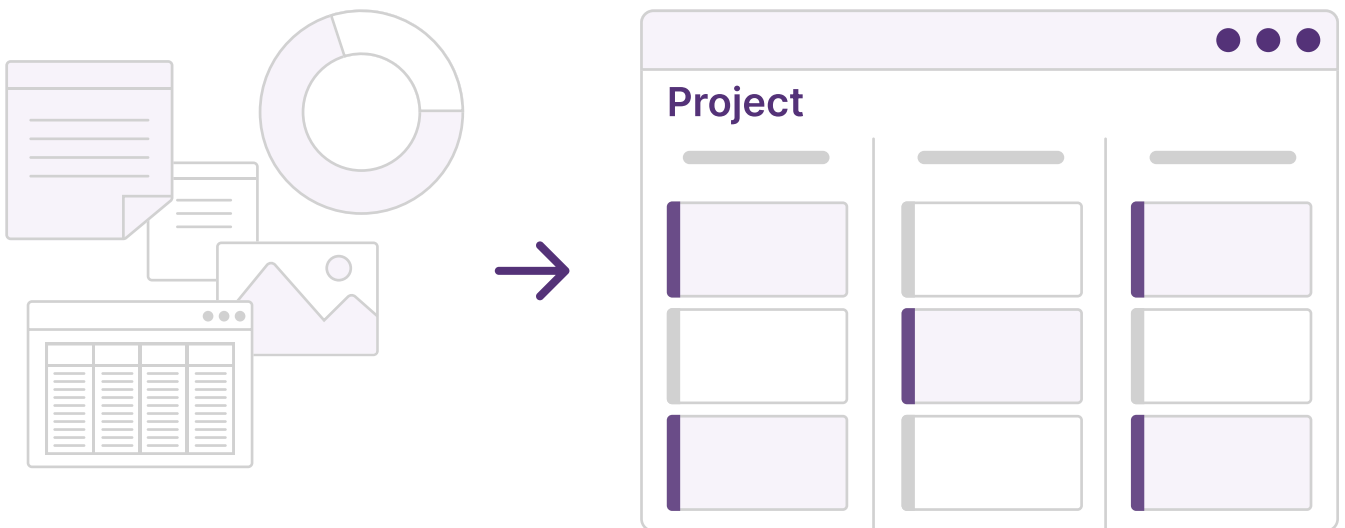
Not convinced? What if we told you that when used properly, Kanban is actually an organization and self-management motivator. How? Well, the assembly-line methodology of knowing your task is coming up before it actually gets to you and picking it up with a visual representation of where it needs to go next, actually forces people to only work at the speed of business, rather than the speed of people. It stimulates self-organization, mindfulness and – which is particularly awesome – “effective use of resources”.

A Well Oiled Machine



A Well Oiled Machine

In fact, using a Kanban system right and eliminating project waste, can actually change the way a team functions when it comes to project execution. The reason behind this is that if everyone is only working on their specific task, and utilizing resources on an as-need basis, they are essentially limiting “works in progress” and bottlenecking, because aside from limiting the number “cooks in the kitchen” you are also able to see which status has the most tasks in it and therefore, where extra support or reinforcement is needed.



What's Your Status?



What's Your Status?

The statuses of the Kanban board are probably the most important part. Which stages of production do you need to make your task progression most successful?

In your Birdview PSA Kanban Board, the statuses carry over from Activity Center, so they are already customized to your team's preferred workflow.

A **marketing team's** board might have statuses like:

Assigned | Research | Content | Editing | Reviewing | Published

While an **IT Support team's** board might read as follows:

Submitted | Fix in Progress | Waiting for Feedback | Issue Resolved

Change My Status, but not His...

Another cool thing about the Kanban Board is that while the statuses are set by whoever has the permissions on a specific team, individual contributors can modify the statuses they see in the same way they can create (or request) custom views in the Activity Center. Also, an even easier modification would be that contributors can choose to hide certain statuses from their own board, without affecting their team. In that way, only the stages which pertain to them are visible. This is a key feature for people who are really only interested in a very specific stage of progression.

For example, given the **marketing team** example before, your content editor might modify his board so that only:

Assigned | Content | Editing | Published are visible;

And the member of the **IT Support team** assigned to website deployment, may click on the marketing project but only need to see:

Assigned | Reviewing | Published on his bo

I Need More Info than I See on the Card

I Need More Info than I See on the Card

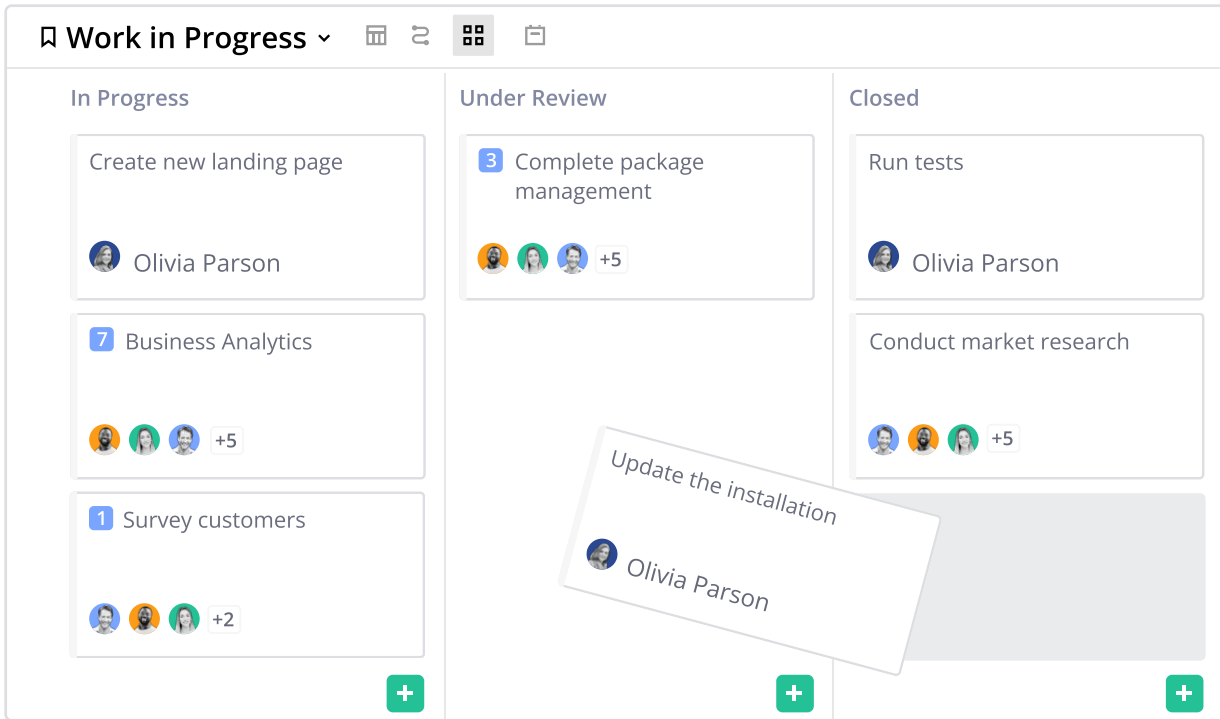
Each task card will display the name of the task as well as the picture of everyone assigned to the task. However, clicking on any card will provide you with an in-depth look at the task, complete with start and end dates, a full audit trail of messages, the ability to submit and approve files, the percentage of progress that has been made, an estimation of hours, and more!

Flexibility, flexibility, flexibility! That is truly the beauty of Kanban. While the board might be your preferred view, it is not an all or nothing view. You still have immediate access to all relevant project information that, for the sake of organization and simplicity, doesn't appear on the board. You can see as much or as little information as you need with just one click.

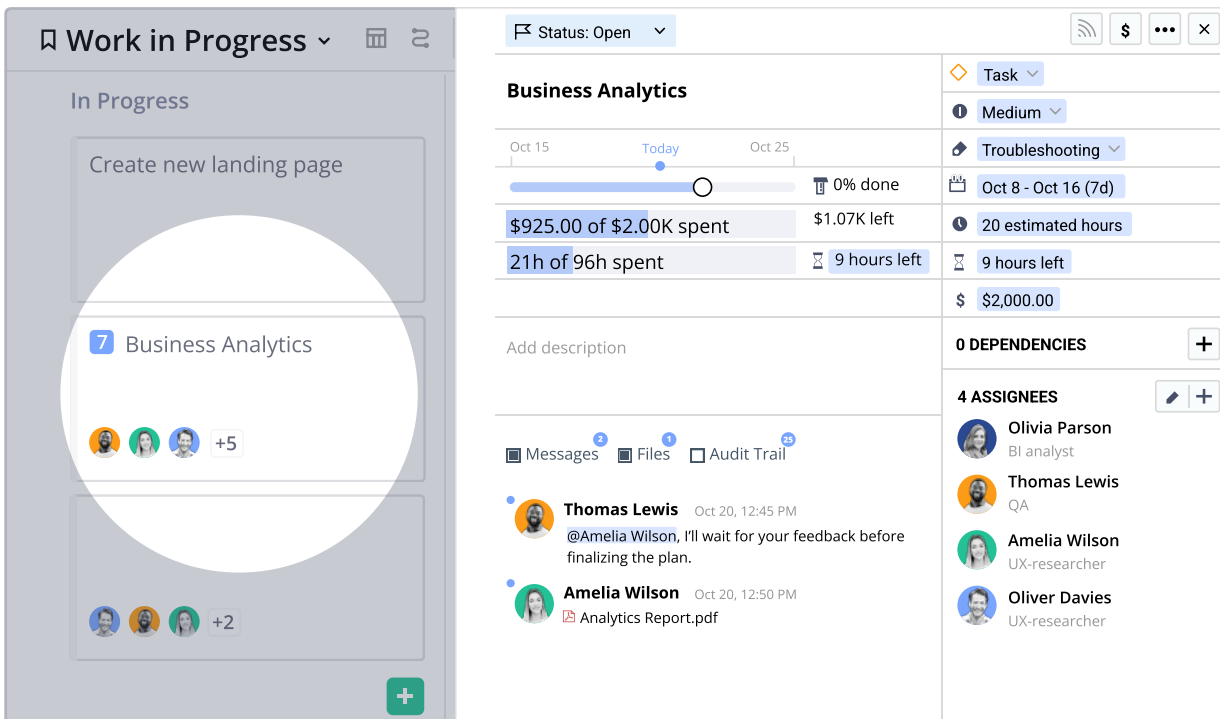
Sample Board

The image shows a sample Kanban board with three columns: "In Progress", "Under Review", and "Closed". Each column contains task cards with titles, assignee names, and team icons. The "In Progress" column has three cards: "Create new landing page" (Olivia Parson), "Business Analytics" (5 team members), and "Survey customers" (2 team members). The "Under Review" column has two cards: "Complete package management" (3 team members) and "Update the installation" (Olivia Parson). The "Closed" column has three cards: "Run tests" (Olivia Parson), "Conduct market research" (5 team members), and "Generate ideas" (5 team members). Each card has a green plus sign at the bottom right.

Drag n' Drop



Project' Details



The Benefits



The Benefits

So now that you understand how Kanban works, let be clear on the benefits to your team:

- Flexibility for teams where different contributors prefer different work styles
- Enables team members to focus on continuity and collaborative workflow
- Reduction of bottlenecking and works in progress
- Increased efficiency and productivity
- Resources – people, time and money – are utilized on an as-need basis with far less waste

Not for Everyone



Not for Everyone

Kanban is not for everyone. There are some teams with a very intricate project execution process which features countless dependencies and would not be suited for the simple, streamlined task progression that Kanban is meant for.

Of course whether you implement a Kanban system is up to you. Here are some situations where Kanban is always useful:

- **Small teams** - groups of 10 or less collaborating on a single project
- **Projects with frequent priority changes** - moving tasks up and down the board according to priority is simple and easy to communicate quickly through the team
- **Maintenance projects** - keeping track of maintenance - for example in IT Support teams is the perfect use case for Kanban
- **Teams with multiple small projects** - even larger teams who put out multiple, small but frequent projects see great success and ease of use with Kanban

A Recap Before We Send You on Your Way

A Recap Before We Send You on Your Way

So what do you need to remember about Kanban Boards before you dive into convincing your team that the switch will be worth it. Just remember this... Kanban allows teams to:

- Visually see work in progress and where bottlenecks in work progression are forming
- Instantly understand where delays are happening and reinforce or reassign accordingly
- Improve communication between team members
- Enable and encourage self-management and more organized workflow
- Inspire teams to collaborate better with a greater understand of each others' workloads

With these points in your back pocket, we know that executing your next project with Kanban will be the easiest decision your team has made since saying YES to Pizza Lunch Fridays!

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