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Real-World Kanban

Do Less, Accomplish More with Lean Thinking

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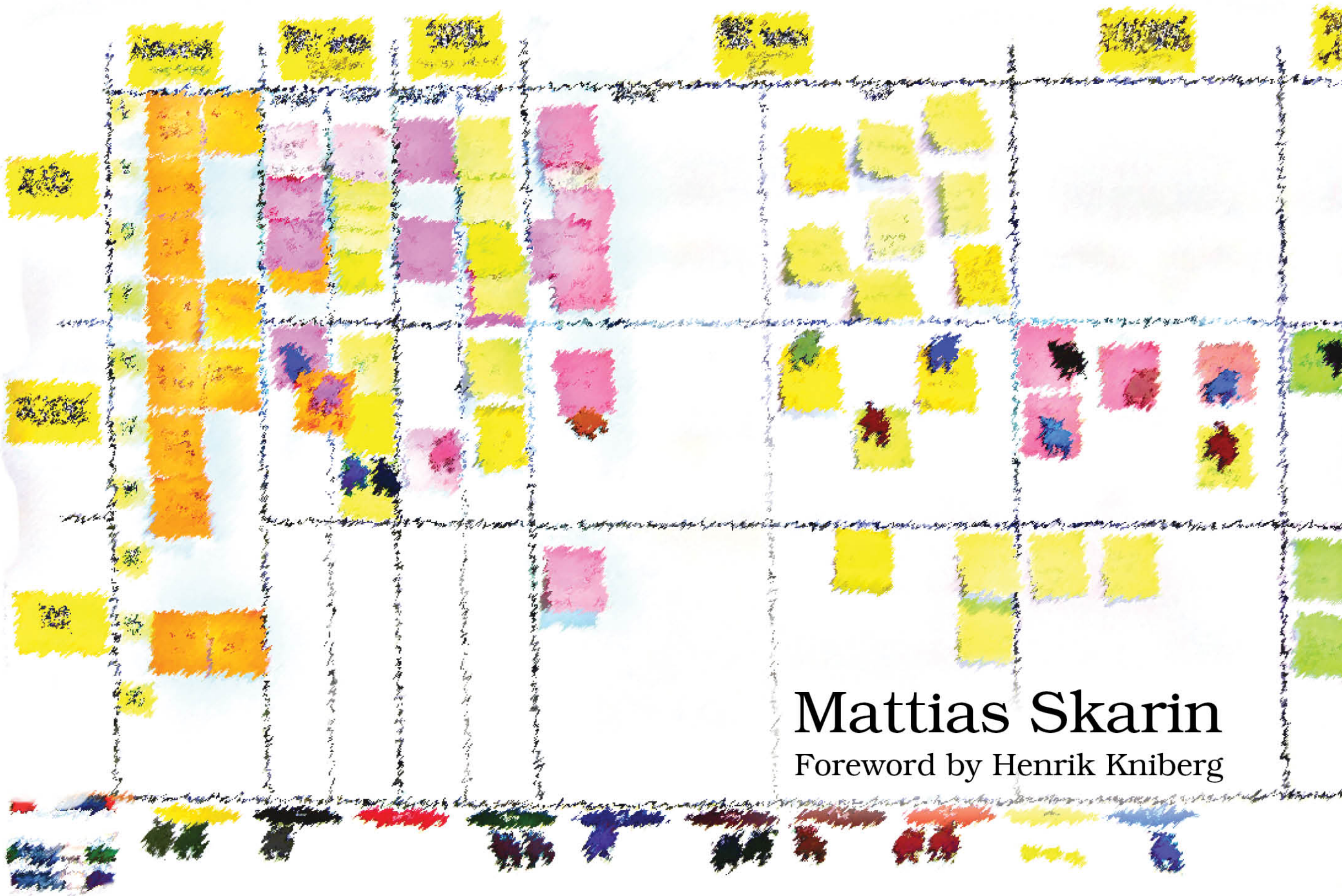

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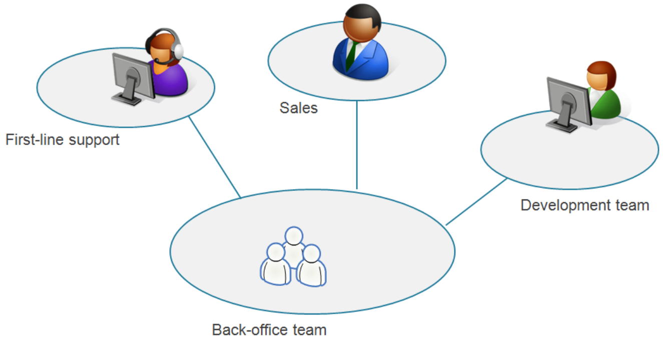
When we talk about change, it's easy to get bogged down with a specific method or technique.

We have already discussed how Kanban can be applied to knowledge work. The next logical question is whether Kanban can work outside of IT. Can Kanban help a self-managing team in an enterprise office environment?

Let's take a look at how a company used Kanban to help a non-IT team improve its operations. Kanban helped this non-IT team to get an overview of its workload, prioritize the tasks, and make sure it was working on the right things.

The Challenge: Keeping Up with Growth

In this case study, we look at a back-office team at a fast-growing bank in Sweden. The team handled pension issues and life-changing events for their customers—such as signing up new customers, processing payments and pension transfers, and tracking marriages and deaths. The team consisted of 14 people divided into two sub-teams—one with a consumer focus and the other with a corporate focus. Most of the time, the team interacted with a call center that acted as the bank's front-line support team. Occasionally, they fielded direct requests from sales and IT teams.



This non-IT team needed to keep up with the company's growth. The team needed to be able to add new members and get them up to speed quickly to keep up the pace instead of relying on a few senior members to handle the daily tasks.

The back-office team was already a very tight-knit team. We used Kanban to build on that relationship.

How We Got Started

The team's Kanban journey started because the managers wanted a new way for the team to handle its workload. At first, the managers looked at Lean for office work, but that didn't quite fit. The managers observed how IT used a Kanban board and decided to give it a try. At the time, I had no prior experience using Kanban outside of IT, but we decided it was worth a try.

Because team members were self-organizing, focused on their specific tasks, and expected to take end-to-end responsibility for their work, getting the full picture for the entire team was hard. This was a problem for management, which needed to track certain types of demand. Each demand type had explicit customer expectations associated with it, so it was important not to lose track of them. Some work had to be delivered on time to meet customer expectations and regulatory requirements.

Early on, we thought Kanban would help us get an overview and see what each member of the team was working on. Management also wanted help prioritizing tasks better to see whether the team was focusing on the right things. Other reasons for pushing forward with the change included spotting areas the team could improve, such as bottlenecks and stalled work.

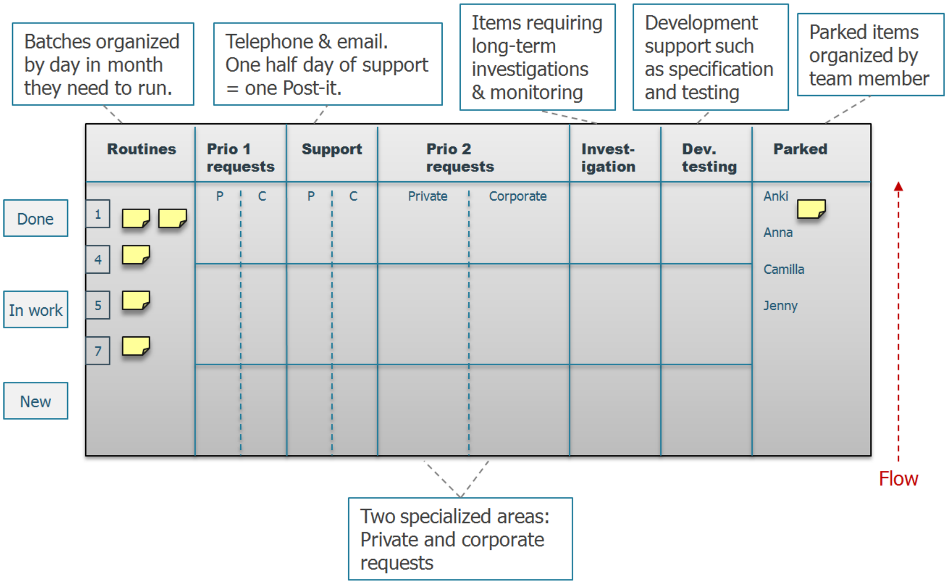
We were concerned that Kanban would result in unnecessary overhead, but the positive effects—focus, basic structure, and getting an overview—outweighed those concerns. The team decided to give Kanban a try, and we soon had our first board up and running.

We invited the team to a workshop where they could experiment with Kanban, learn basic principles, and ask questions. For the most part, the team reacted positively. No office team in the company had tried using Kanban before, and this back-office team was excited to be viewed as pioneers.

Learn the Principles

Learning about the principles behind Kanban helps the team understand how to move beyond the tools. Whenever you are about to introduce new teams to Kanban, invite all the members to a half-day workshop to make sure they understand both the what and the why of what they will be doing. This will pay off in later conversations.

That's the background in a nutshell. Let's look at how the process worked.


Batches organized by day in month they need to run.
Telephone & email. One half day of support = one Post-it.
Items requiring long-term investigations & monitoring
Development support such as specification and testing
Parked items organized by team member
Routines
Prio 1 requests
Support
Prio 2 requests
Invest-igation
Dev. testing
Parked
P
C
P
C
Private
Corporate
Anki
Anna
Camilla
Jenny
Done
In work
New
1
4
5
7
Flow
Two specialized areas: Private and corporate requests

How Our Process Worked

Let's take a look at our Kanban board. The work arrived at any time through any number of channels: face-to-face requests from teams in the same building, queries over the phone, and tasks sent over email, to name a few. As soon as work arrived, it would be put on the Kanban board in the New row at the bottom and in the corresponding column, as shown in the following image. Each column has a designated prioritization, with the highest priority on the far left. The relative priority for each work type was set by the two managers of the teams. This made it very easy to spot what to focus on with a quick glance at the board from left to right.

Let's take a look at each of the columns in detail.

Demand Type	Column / Description
Routines	Some of the work was recurring. For example, "On Mondays, we have to run the payment batch." All these routines were kept on the left side of the board in a column organized as a (monthly) calendar. When the day in the month arrived, the employee would fetch the routine Post-it from the Routines column and insert it as a normal item into ongoing work (Prio 2 Requests). After completion and calculation, it would be put back in the Routines column under the correct date.

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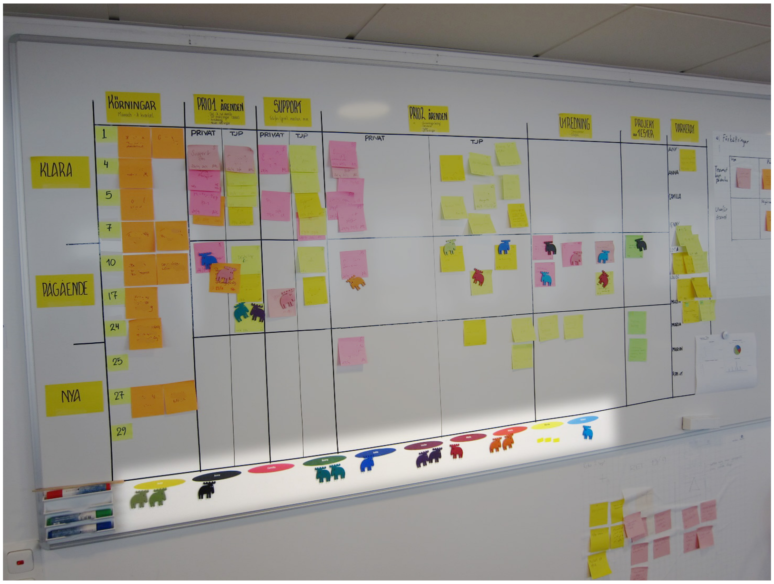
Prio 1 Requests	These were requests from customers that needed to be delivered quickly and on time.
Support	Support was divided into blocks representing a half day's support work. So if a team member spent one morning on handling support, that would constitute one block and would be represented on the board as one Post-it. The reason we kept the support work on the board was to make it clear who was working on what, to get a rough idea of how much of the team's total workload came from support issues, and to learn the variations in the demand flow over time.
Prio 2 requests	These were requests from internal functions that were not necessarily time critical.
Investigations	Long-term issues were kept here. Investigations represented issues we had to monitor or wait for input for a longer period of time, such as life-changing events when a customer died.
Development Support	This included acceptance testing, review of new requirements, or contributing ideas to the development team.
Parked	An item could only enter the Parked area if the team had already done all it could and external action was pending to resolve it. The neat thing about this column was that it was organized around each team member. This way, parked items didn't get lost or forgotten.

Dealing with Parked Items

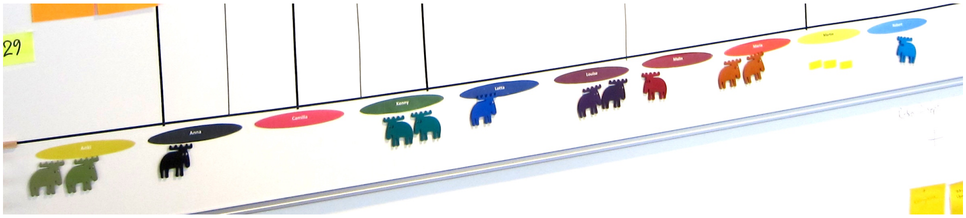
There is a challenge in maintaining a *parking area* for items that require external interaction: it's easy to forget about them. You can use one of three approaches to avoid this:

- Before you park an item, you should make sure that you have completed everything on your part first, because revisiting work can be costly.
- You should walk through all parked items in one of the weekly standup meetings.
- Or, as in the case of this team, you should keep parked tickets in a specific column organized by team member.

In the beginning, the team experimented with different settings and layouts to learn the level of granularity needed for each task, what to keep and what not to keep on the board, how to handle recurring routine work, and how to apply and use their work-in-progress (WIP) limits.



We introduced WIP limits with elks (yes, the animals). Every team member received three elks to place on the board. If the person had all the elks on the board, then he or she could start new tasks until all the existing work had been completed.



Using a limited number of physical tokens helped everyone to see who was working on what and to track work at risk of stalling. Work can stall for various reasons, including people being away from the office or being sick.

Before this team started using Kanban, support requests and small questions would just pour in to a random person on the team. To deal with this, we assigned the daily task of answering telephone calls and minor email requests to two team members. We rotated this assignment among the team members on a regular basis. Setting up this request-fielding system was challenging because not everyone on the team knew how to handle the main bulk of the questions coming in. After discussing the problem with the team, we decided that the person on duty would become the owner of that question. That person could ask for help from others, but as the owner, it was that person's responsibility to deliver an answer. Combining telephone and email support freed up other members of the team to work on long-term projects. The support schedule was also kept to the left of the Kanban board.

The members were positive about being part of the team. They liked the variety of work and often named good colleagues as one of the upsides of working with the team. With everyone managing his or her own workload, sharing responsibilities such as keeping the board updated and alerting each other when someone else was stalled did not come naturally. We grew this sense of shared responsibility by making the team take ownership of the board. Everyone had a chance to weigh in on any change—we called them *team agreements*—before it was added to the board. We cultivated a strong sense of ownership by keeping a document on the left of the board listing all the agreed-upon changes.

The managers maintained a knowledge plan listing who needed to learn what topics and who could teach which materials. This plan was visible to the team, and it was up to the team to update and maintain the plan every six months.