



Successfully Implementing Kanban with Portfolio/ Upstream Kanban

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AKT/ AKC

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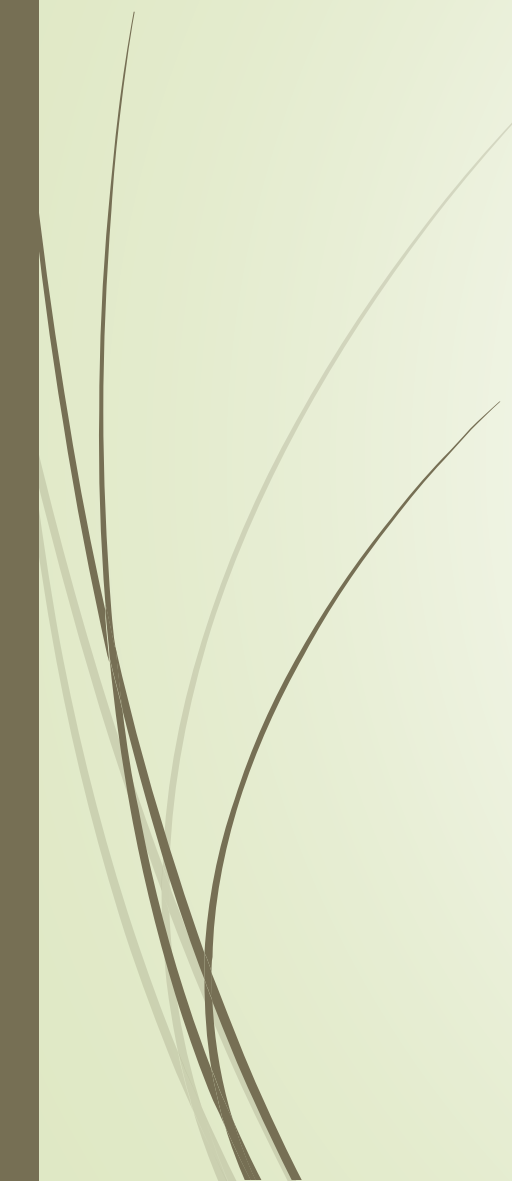


Agenda

- Introductions
- A Quick word from the Sponsor
- Portfolio and Upstream Kanban – Mahesh Singh
- Q&A



Some housekeeping

- The webinar is being recorded. The recording will be made available.
 - Questions will be taken via Q&A box on the right side of your screen. Please enter your question at any time. We will take as many of them as time permits at the end of the webinar.
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Introductions



➤ Mahesh
Singh
Co-founder,
SVP Digité,
Inc.

- Entrepreneur, Lean/ Agile Product Management leader.
- Based in the San Francisco Bay Area
- Co-founder at Digité, Inc.
- AKT and AKC
- As part of his work at Digité, he works with most European and American clients to provide Lean/ Agile training and coaching
- Runs Digité's implementation engagements for SwiftKanban



A word from the Sponsor

- Digité, Inc. - Pioneer in Web-based Collaborative Products/ Solutions for Geographically Distributed Teams
 - Headquartered in Cupertino, CA
 - Nearly 1m users in the Americas, Europe, Asia/ Pacific
 - Products that cover Lean/ Kanban, Agile ALM, Project/ Portfolio Management
 - SwiftKanban/ SwiftESP are our flagship Lean/ Agile products
- 

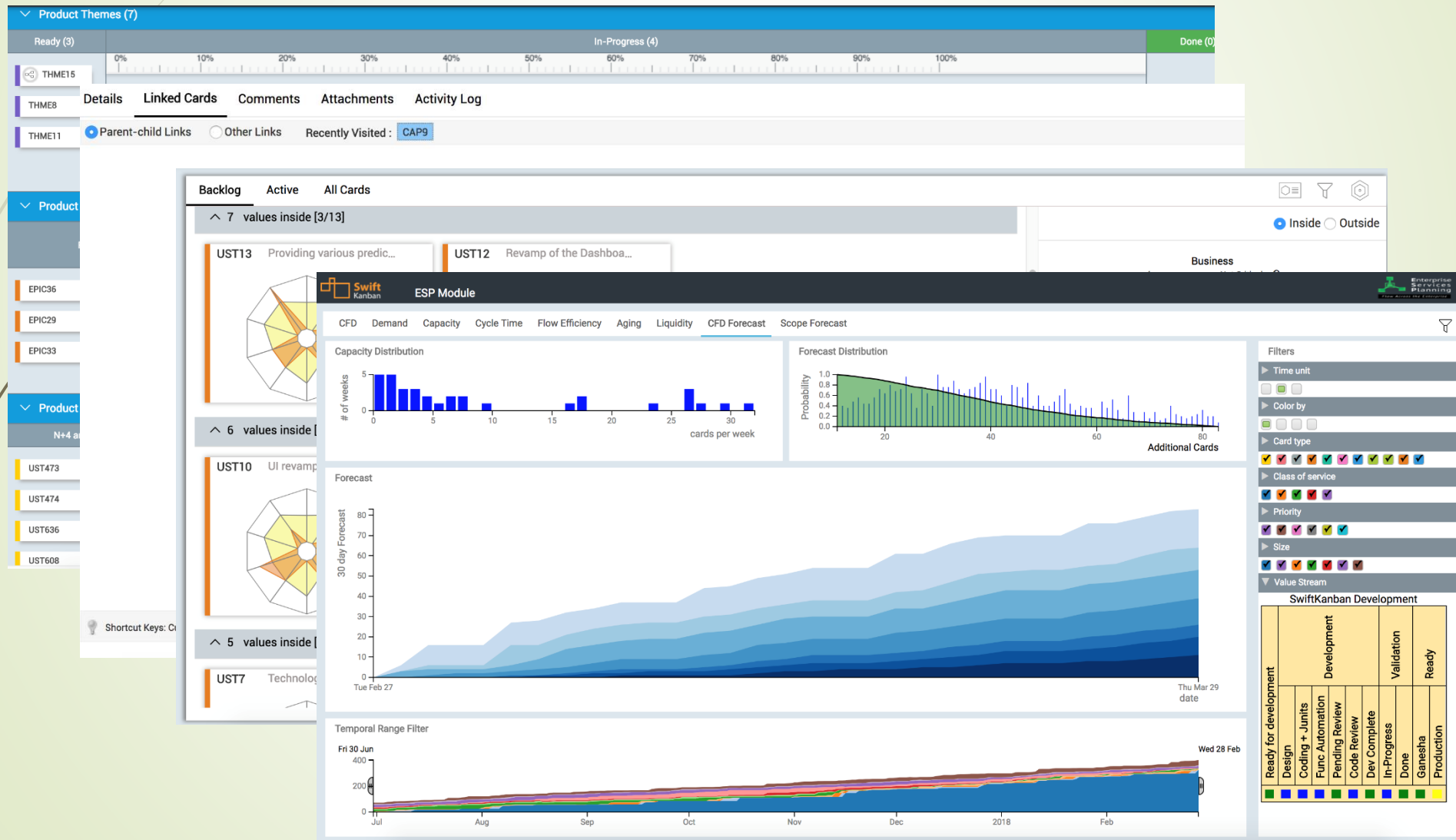
Kanban/ Scrumban Software Development/ IT/ DevOps

The screenshot displays the SwiftKanban Development 2.0 Kanban Board. The interface is organized into columns representing different stages of the development process: Ready for development (10/15), Design (3/5), Coding + Junits (17/18), Development (32/20), Done, Code Review (1/5), Dev Complete, and In-Progress (0/5). Each column contains multiple task cards, each with a title, description, priority (indicated by stars), and a status (indicated by a colored dot). The cards are color-coded by column: yellow for Ready for development, blue for Design, green for Coding + Junits, orange for Development, and red for Done. The interface also includes a top navigation bar with the SwiftKanban logo, version information, and a search bar. A sidebar on the left shows the current board and a list of boards. The bottom of the interface features a footer with copyright information and a link to the SwiftKanban website.

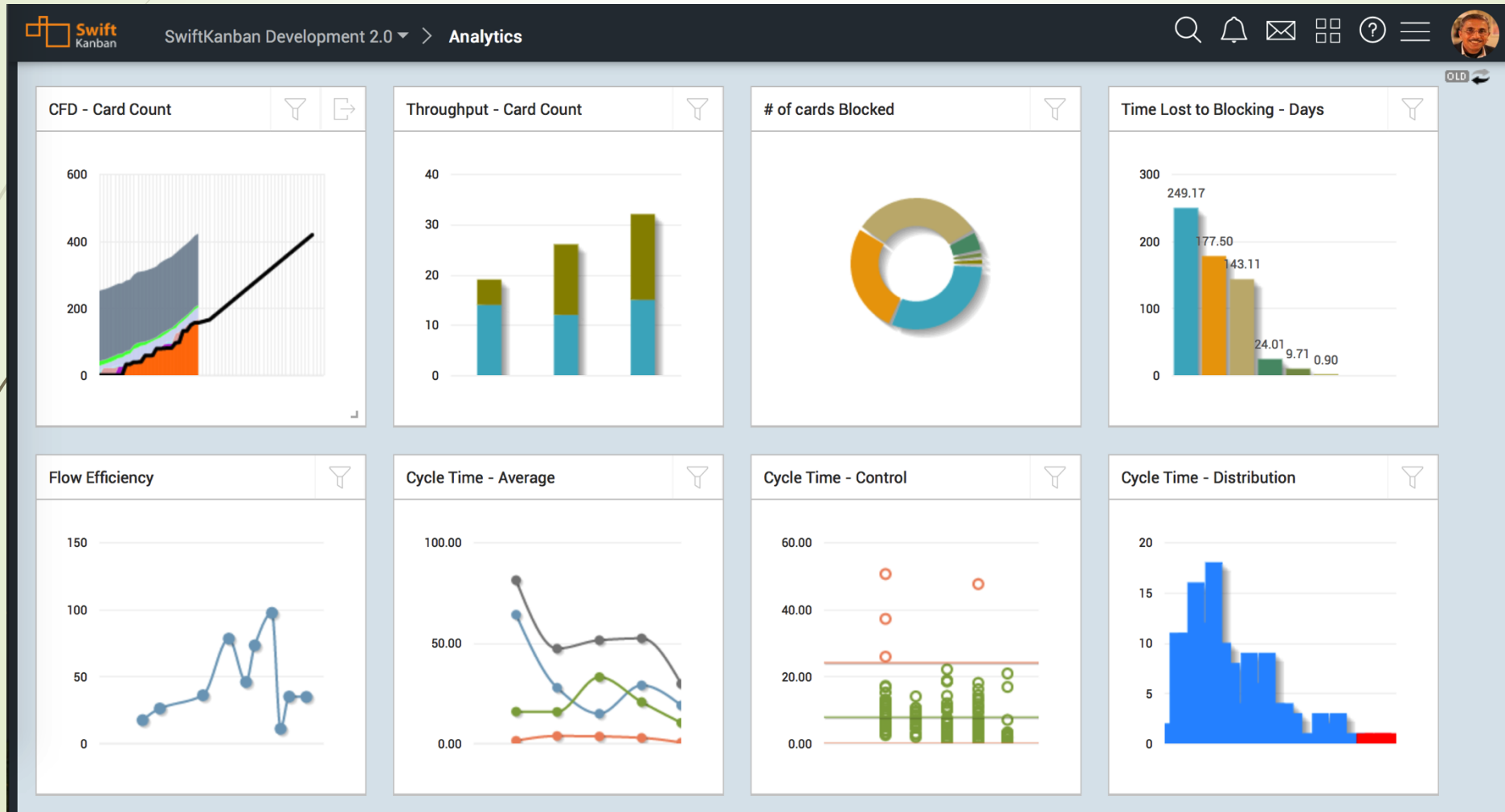
Ready for development (10/15)	Design (3/5)	Coding + Junits (17/18)	Development (32/20)	Done	Code Review (1/5)	Dev Complete	In-Progress (0/5)
<ul style="list-style-type: none">UST620: Clone of: Adding restriction for team level licenseDEF1003: ESP issuesENHC329: Clone of: Hierarchy view improvementUST919: Clone of: Bulk cards operations for adding parent and childUST621: Clone of: For the custom login feature, enable projectid an...TASK477: CI MigrationTASK463: Check the impact of MySQL 5.6 version on SwiftKanbanISS133: General UI/UX usability issuesTASK340: Running jmeter run and analyzing run results for improvement...CDEF364: Project Sequence number repeating in a single app account.	<ul style="list-style-type: none">CDEF372: Login and slow board loading issues.DEF1002: CFD not loadingTASK484: Swift Build and Junits	<ul style="list-style-type: none">ENHC363: Option to import the card directly on the board through expo...UST611: Clone of: ESP enhancements RiskUST610: Clone of: ESP enhancement - Portfolio KanbanUST617: Clone of: Part 2: Add card via emailCDEF387: DEF8 Child card's progress time line shown improperlyENHC321: UI/UX pending enhancements for the new themeUST582: Extending number of text custom fieldsENHC342: Clone of: Huawei UST44 in card's detail page, show the comm...	<ul style="list-style-type: none">ENHC349: Integration of the signup page to be changes from infusion S...TASK482: Gandiva-Build and junitsCDEF386: Board Chat not working properly in IEUST607: Clone of: Assigning cards to non team members of the boardUST609: Clone of: Personal Kanban view/Landing page for users/Inbox...UST615: Clone of: Hierarchy Status ReportENHC359: Clone of: Providing To-Do/Doing and Done view in the Release...TASK280: Production Server Performance Issue...	<ul style="list-style-type: none">TASK424: Limit the no of request from a user for webservicesCDEF390: DEF14 WIP limit restriction fails if only setting the parent...UST608: Clone of: Seeing multiple team boards contributing to a com...ENHC331: Notification panel designENHC347: Clone of: Huawei UST41 Board filter provides multiple schem...	<ul style="list-style-type: none">UST618: ESP purchasing via websiteENHC351: WIP enhancementsDEF1001: When user upgrades from Free trail to Team license then the ...	<ul style="list-style-type: none">ENHC301: Project should be renamed to Board throughout the toolENHC353: Excel enhancement for export in xlsx formatDEF982: Kanban Board is not loading through project edit screenCDEF389: Unable to delete card	

Visual Portfolio Management

Portfolio Kanban/ Enterprise Services Planning



SwiftKanban - Analytics



SwiftSync Integration Platform

Rich ALM/ PPM/ CRM Ecosystem (Over 60 tools)



Some of our Customers

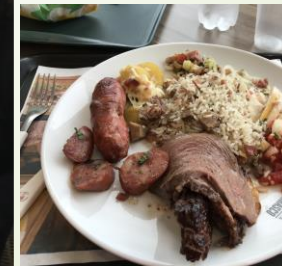
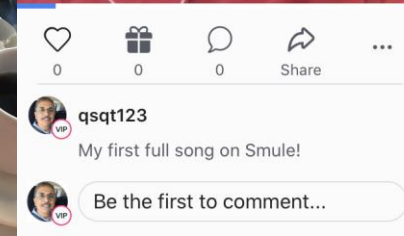


Kanban – A Tale of 2 Approaches

Our Experience/ Findings

- Over nearly 10 years - Clear distinction between companies that were succeeding with Kanban and those that weren't
- Those who stay the course -
 - EITHER - remain at a very low (visualization-level) maturity – using Kanban/ SwiftKanban as a work tracking/ reporting tool
 - OR - Go up the maturity ladder quickly and improve beyond their own expectations. They really “get” Kanban!
- So, we started to dig deeper – and this is that story..

A bit about me



Our Observation: Many organizations typically tend to have Weak Implementation

- Proto-Kanban/ Level 0 maturity – mainly focused on visualization
- Adherence to WIP limits - weak
- Lack of explicit other policies – esp. agreements with stakeholders
- Pull was always a ?

Inevitably, Key Problems Persist, especially in Software Dev/ IT

- High Demand as “management” and business continue to expand demand
- Poor “backlog management” practices
- Interrupt-driven work leading to High levels of context switching
- Overburdening and dissatisfaction returns quickly after initial “Kanban euphoria”

Our Findings: Disconnected Leadership

- No real involvement/ ownership of the Kanban implementation
- Insufficient funding, insufficient training, leading to lack of deeper knowledge of Kanban in many teams
- Kanban simply being used as a “reporting tool” rather than any improvement

Was Kanban also growing a Butt?!

Some of the same challenges of Scrum or <Put any “disruptive method” here>

- WIP Limit adherence
- Over-loaded Backlogs/ Ready Columns
- Overloaded/ context-switching team members
- Mindset/ culture
- Leadership involvement
- Temporary change, followed by “business as usual”

Butt, we thought – “There is
hope....!” ;)

Many organizations are succeeding!

- Clearly, Kanban is growing, as is the number of customers we have 😊
- They are doing it the right way!

Two broad styles of engagement we have seen

- Type 1: Teams get trained, they define their boards (and/ or create them in SwiftKanban) and they are off to the races. “Business as Usual”
- Type 2: Extensive Initial Discussion and Focus on “Board Organization”. “How do we design & organize our boards?”

Some early indicators of Type 2 engagements....

- Two Noticeable Patterns of Discussion
 - Top-down Thinking/ design (Aligning Strategy to Execution)
 - System Thinking Approach (Looking at extended – if not whole – value streams)
- Better overall “organization”
 - Org. wide focus on Lean/ Agile (not just IT/ software)
 - Strong Lean/ Agile COE, team of coaches
 - Leadership Involvement

What are they doing different?

- They are LEADING the Kanban implementation with:
 - Portfolio Kanban, and/ or
 - Upstream Kanban

Portfolio Kanban

Aligning Strategy to Execution

Portfolio Management has traditionally been Complex

- Always a somewhat “esoteric” challenge for most organizations
 - Strategic Initiatives
 - Programs/ Projects
 - Products/ Applications
- Combination of What-if Analysis of
 - Financial Cost/ Revenue
 - Risk
 - Tasks/ Resources
 - Opportunity Cost

Portfolio Management tooling has been Complex

- Domain of senior management/ CXO/ PMO
- Difficult to propagate downwards and communicate to teams
- Highly data-intensive
- Difficult to provide/ track progress (information upwards)
- PMO challenge – keeping leadership updated

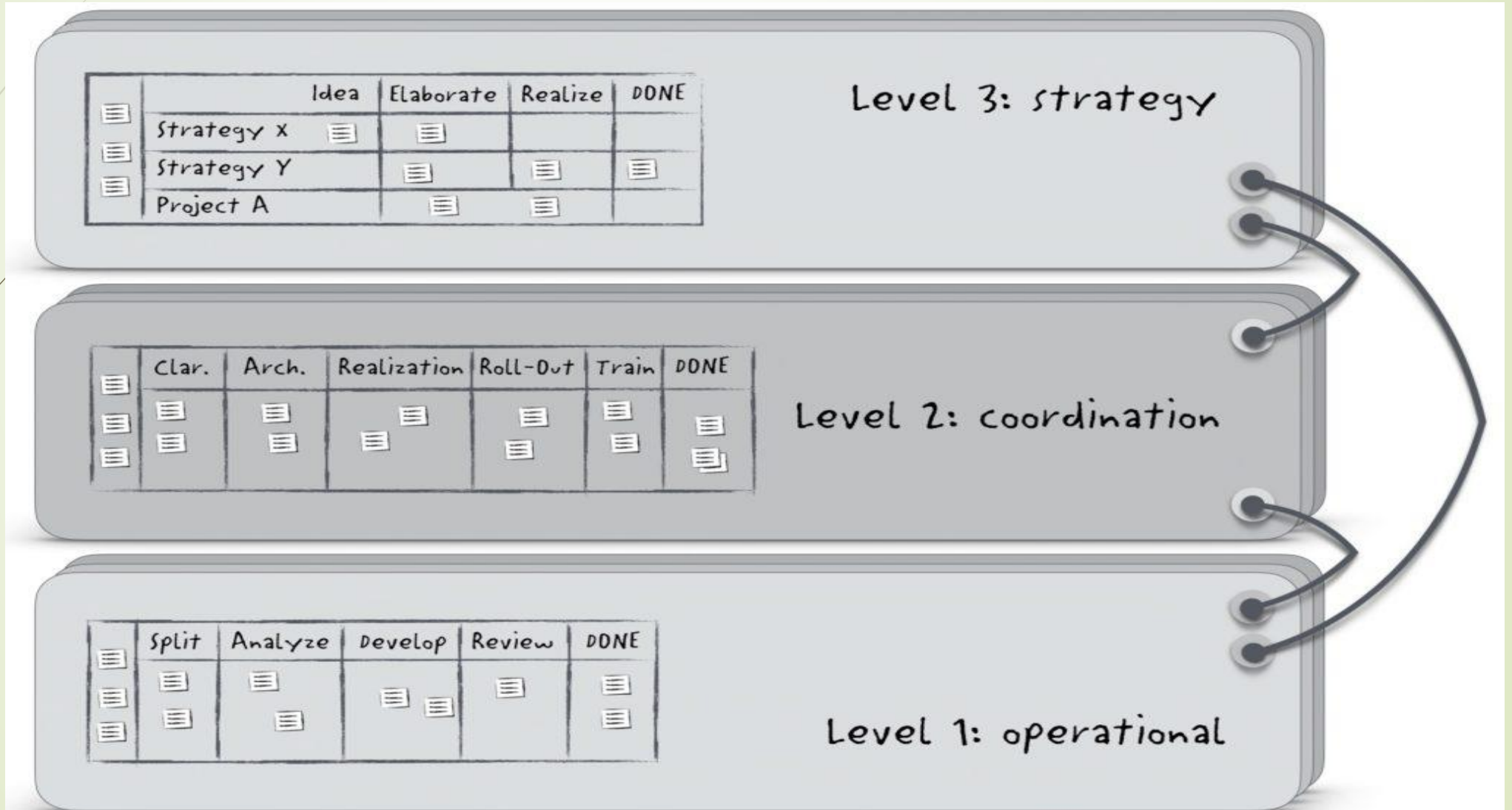
Enter (Portfolio) Kanban

- Kanban provides a Simple and elegant alternative
- Simplified – yet EFFECTIVE – approach to analysis and prioritization
 - Lead Time
 - Cost of Delay
- Visual, hence easy Track & Communicate
 - A top-down approach to driving organizational priorities
 - A minimum of 3 levels of Kanban – Strategic/ Planning & Coordination/ Execution
 - Org. level Lean/ Agile (more often Lean) initiative

Two types of Portfolio Kanban Implementation

- Klaus Leopold's Flight Levels
 - Strategy – Planning & Coordination – Operations
- Typical Work Hierarchies
 - Portfolio – Program – Projects
 - Product Themes – Epics – User Stories
 - Marketing Themes – Campaigns – Deliverables

Kanban Flight Levels



Portfolio Kanban: Simple, Visual and Elegant

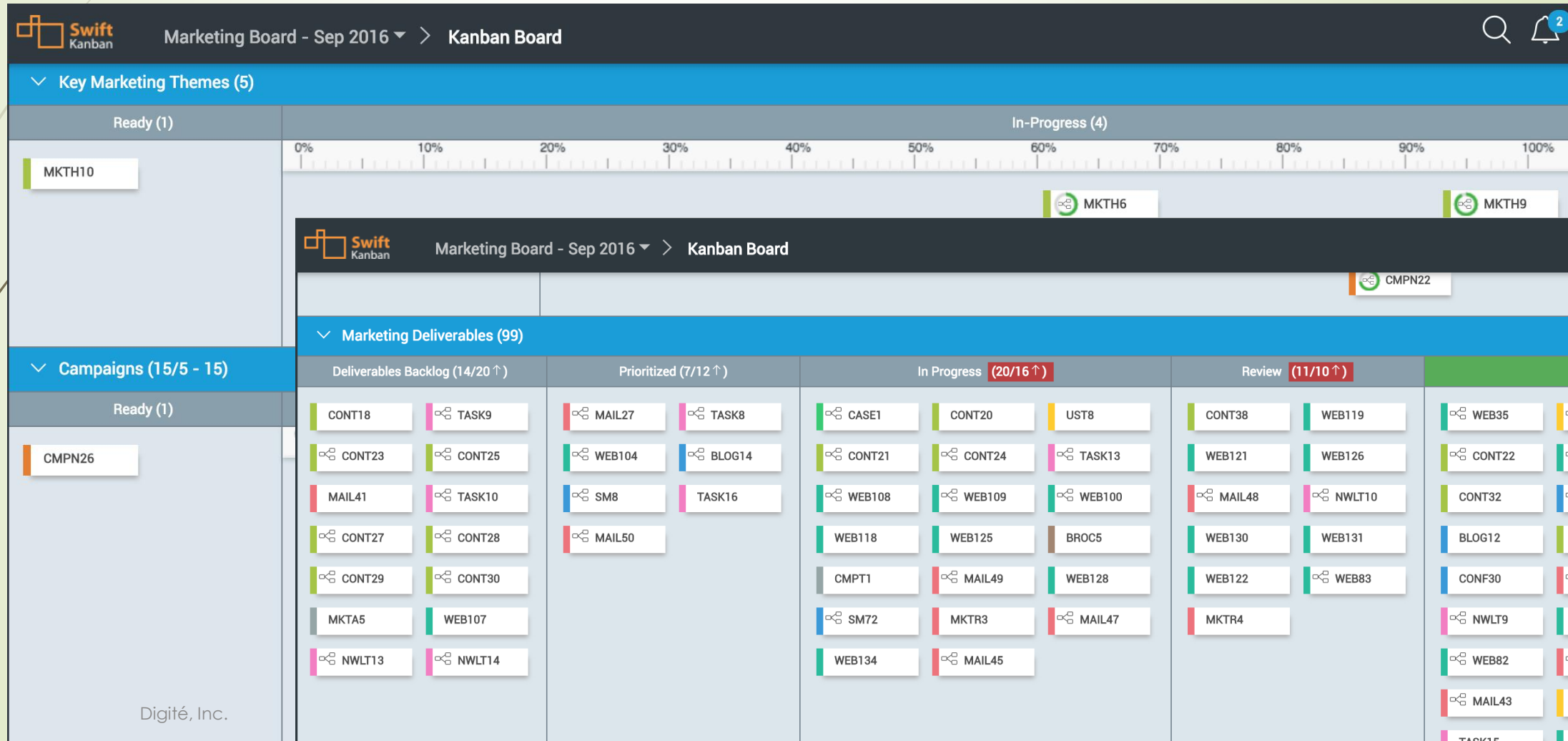
- Apply Kanban at any level
- Start from Top or Bottom
- Top-down - At any point where more detail is needed, decompose to a lower level Kanban flow
- Bottom-up – For any workflow, if abstraction is needed, “summarize” to a higher level Kanban

Portfolio Kanban:

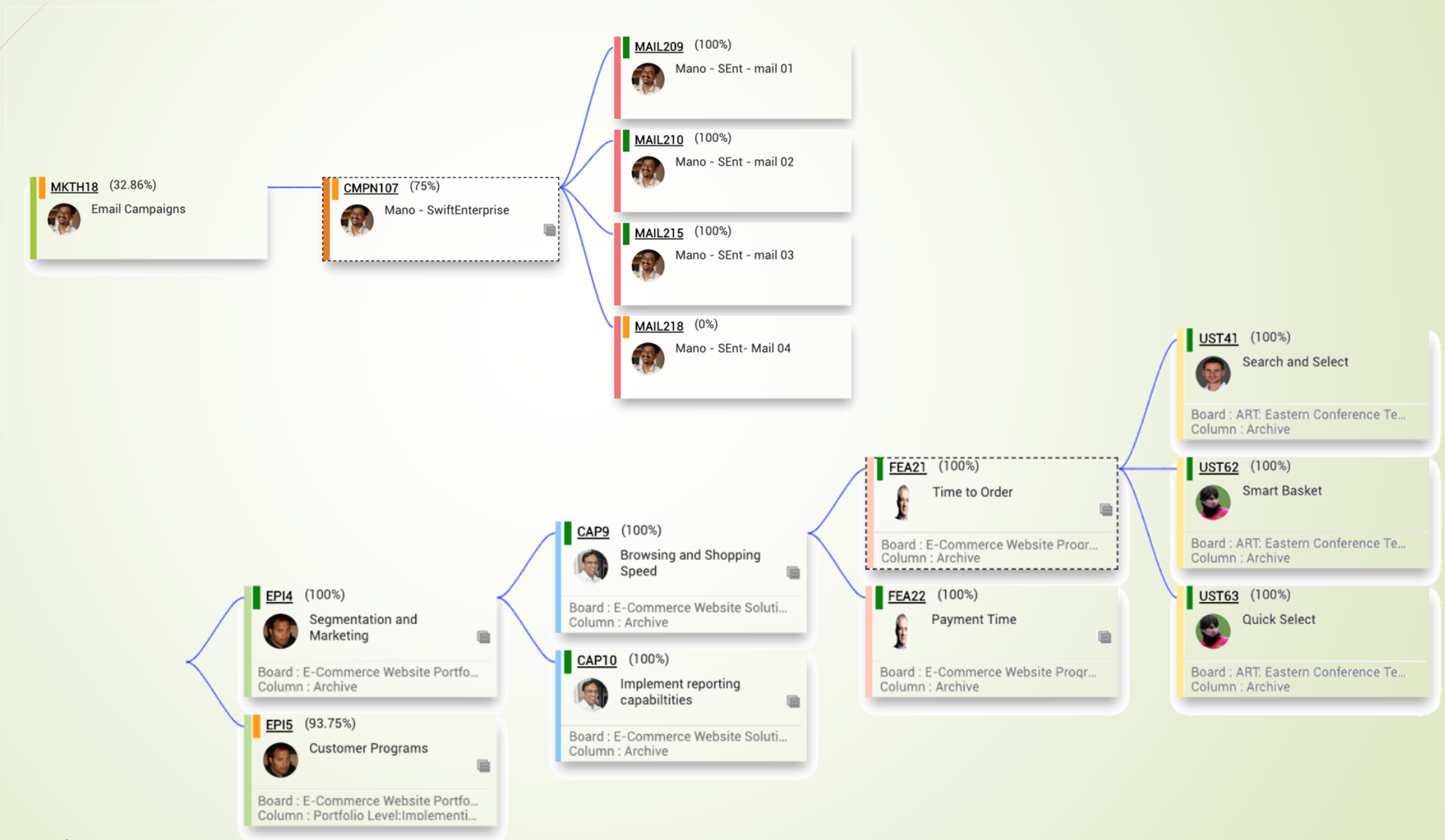
OKR/ Goals → Initiatives → Epics



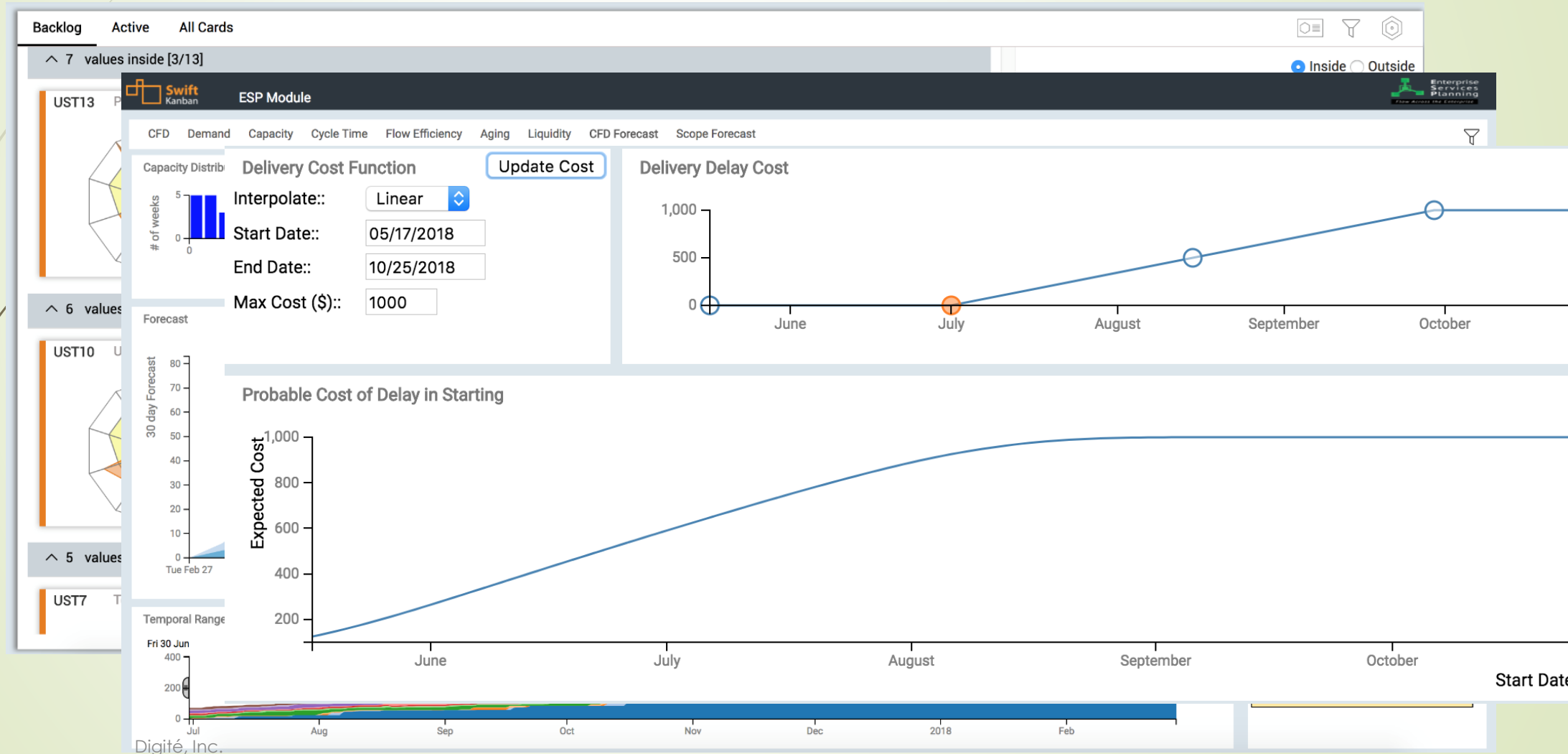
Portfolio Kanban: Themes → Campaigns → Deliverables



Kanban: Visual Portfolio Management



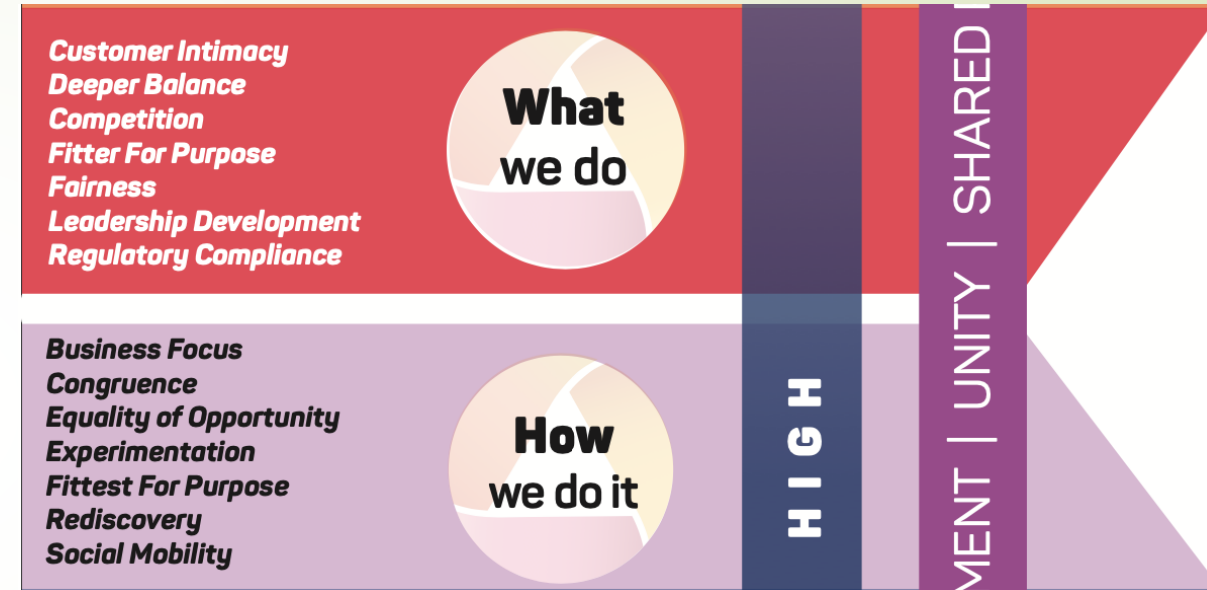
Focus on Lead Time Performance and Cost of Delay



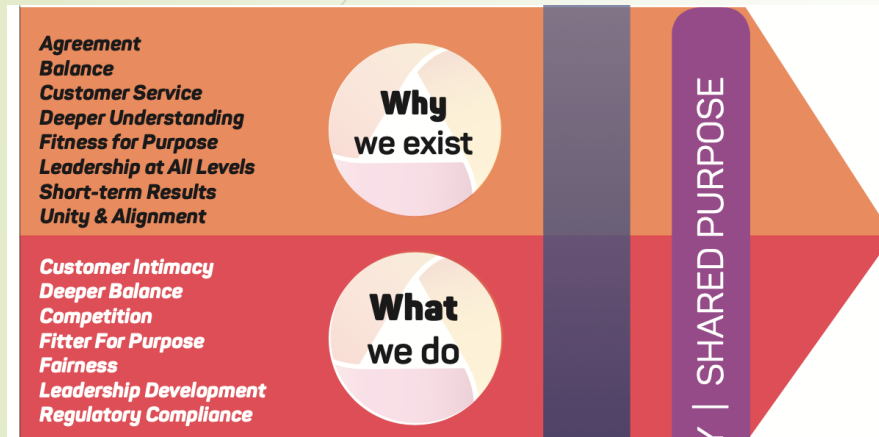
Benefits of Portfolio Kanban

Provides Leadership Immediate Value

- Gives an opportunity for leadership and operational teams to “engage” or “connect” and get involved
- Provides leadership an ability to prioritize and manage strategic initiatives in a simple manner (“What is the next (set of) important things to do?”)
- Gives leadership a clear visibility to execution (“How is this initiative being executed?”)



Benefits of Portfolio Kanban



Helps Delivery to Understand their Context/ Purpose

- Provides departmental/ business unit leadership an effective way to collaborate across functions and discover/ manage dependencies (“Where are the bottlenecks?”)
- Gives operational teams proper context for the work they are doing (“Why am I doing this?”)

In Summary:

- Portfolio Kanban Encourages/ supports KMM Level 3-5 behavior
- Alignment of Business Imperatives to Execution, Leadership to Teams – CONGRUENCE/ BUSINESS FOCUS
- Clarity and commonality of Purpose for greater organizational good – DEEPER UNDERSTANDING/ FITNESS-FOR-PURPOSE
- Greater Buy-in – greater Leadership support to “acts of leadership” shown by middle management and teams

Upstream Kanban

Kanban encourages Systems Thinking

- “Traditional Agile” focused primarily on “Delivery”
- Typical team level Kanban implementations transition from Scrum to Kanban also focus their attention here
- While some are successful, many have stagnated or even failed, not realizing any of the key benefits of Kanban

Early Signs of Who has succeeded

- Explicit intake policies – agreement with stakeholders
 - WIP Limits
 - Level of detail and clarity
 - Prioritization process
 - Replacement/ Substitution
 - Discard
- Greater attempts at better backlog management
- Better organized Replenishment Meetings/ Processes

In other words ...

- These teams have realized they ALONE cannot solve their problems
- They need to work with
 - People they are impacted by (sources of demand)
 - And people they in turn impact
- They realize that in order to ensure their own policies work, they need to have explicit agreements (policies) with their stakeholders
- This enables them to have tough conversations up front about their Demand and Capability



Stages of Progression

- Stage 1: Visualization own process
- Stage 2: WIP Limits and other internal Policies
- Stage 3: Policies with stakeholders/ customers
- Stage 4: Upstream process visualization on same board
- Stage 5: Upstream Processes on a separate Board

Our own story →

Stage 1: Visualize own Process

The screenshot displays the Swift Kanban application interface. The top navigation bar is blue and contains the Swift Kanban logo, links to Dashboard, Projects, People, and Admin, a Board Search input field, and user links for New!, Help, Feedback, and Mahesh. Below this is a green breadcrumb trail: Admin >> All Projects >> Kanban Development >> Kanban Board, with a Quick Links button on the right. A secondary blue toolbar contains icons and labels for Add Card, Collapse, Board Filter, Modify Process, Activity Log, Legend, Full Screen, and Refresh. The main content area shows a Kanban board for 'Swift-Kanban Development'. The board has five columns: Ready (0/5), Develop (0/5) (which is further divided into In-Progress (0/3) and Done (0/2)), Validate (0/5), and Approve (0/5). The bottom of the board has two expandable sections: Defects and Issue.

Ready (0/5)	Develop (0/5)		Validate (0/5)	Approve (0/5)
	In-Progress (0/3)	Done (0/2)		

>> Defects

>> Issue

Stage 2: Policy and WIP Limits

Swift Kanban

Dashboard Projects People Admin

Swift-Kanban Development 2.0 » Kanban Board Quick Links

+ Add Card Collapse Board Filter Modify Process Activity Log Legend Full Screen Refresh

Development Board

Ready for development (10/20)	Design (4/5)	Coding + Junits (4/10)	Functional Test Automation (0/5)	Development (13/20)	Code
<p>DEF439</p> <p>Chome session timeout, re-login prompt n...</p> <p>Priority: Due Date: Estimate: 30-Aug-2012 1 Days</p>	<p>ISS76</p> <p>IE issue- permanent URL</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST327</p> <p>Card Hierarchy UX Improvements</p> <p>Priority: Due Date: Estimate: 23-Aug-2012 3 Days</p>		<p>DEF432</p> <p>Blocked comment is not coming proper</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST303</p> <p>Ne re</p> <p>Priority: Du</p>
<p>UST283</p> <p>Performance on Enterprise Board</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>TASK83</p> <p>Card configurability: design discussions...</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST315</p> <p>Card Type change</p> <p>Priority: Due Date: Estimate: 28-Aug-2012 10 Days</p>		<p>DEF434</p> <p>Print-PDF is not working for special cha...</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST297</p> <p>JIF</p> <p>Priority: Du</p>
<p>UST325</p> <p>Aligning Add Tracebility view with Card ...</p> <p>Priority: Due Date: Estimate: 23-Aug-2012 5 Days</p>	<p>UST330</p> <p>Board printing design</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>TASK67</p> <p>Blocked</p> <p>Prototyping for Android Native App for m...</p> <p>Priority: Due Date: Estimate: 5 Days</p>		<p>DEF438</p> <p>There is an error in printing Due date</p> <p>Priority: Due Date: Estimate: 0 Days</p>	
<p>UST308</p>	<p>UST316</p>	<p>DEF435</p>			

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Stage 3: Policies with Stakeholders

- Maximum of 10 new User Stories OR 20 cards in Ready queue
- The 11th story would have to replace one of the 1st 10
- No Substitutions once a User Story had “started”
- Min. level of detail expected –
 - Functional description
 - UI wireframe/ sketch/ prototype
 - UX – persona driven navigation and workflow impact

Stage 4: Upstream Process on Same Board

Swift Kanban

Dashboard Projects People Admin

Swift-Kanban Development 2.0 >> Kanban Board

Board Search

Quick Links

+ Add Card Collapse Board Filter Modify Process Activity Log Legend Full Screen Refresh

Planning Board

Ready For Estimation (13/15)	Estimation (2/15)		Spec Development (12/20)		
	In-Progress (0/5)	Done (2/10)	Prioritized (3/10)	In-Progress (3/5)	Done (6/10)
<p>UST216</p> <p>Resizable Pop-ups</p> <p>Priority: Due Date: Estimate: 0 Days</p>		<p>UST182</p> <p>Rich Text UI Cleanup</p> <p>Priority: Due Date: Estimate: 3 Days</p>	<p>UST80</p> <p>Onsite deployment Licensing mechanism</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST286</p> <p>ToDo changes</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST312</p> <p>...</p> <p>Priority: Due Date: Estimate: 0 Days</p>
<p>UST329</p> <p>Filter Card By Due Date</p> <p>Priority: Due Date: Estimate: 0 Days</p>		<p>UST114</p> <p>Persisting lane setting</p> <p>Priority: Due Date: Estimate: 5 Days</p>	<p>UST218</p> <p>Filter improvement in metrics</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST282</p> <p>Include % completion in Card Carousel</p> <p>Priority: Due Date: Estimate: 1 Days</p>	<p>TASK68</p> <p>...</p> <p>Priority: Due Date: Estimate: 0 Days</p>
<p>UST241</p> <p>Allow a copy to clipboard option</p> <p>Priority: Due Date: Estimate: 3 Days</p>			<p>UST306</p> <p>Board Template - Remaining Changes</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST94</p> <p>Including Lane selection in Lead time me...</p> <p>Priority: Due Date: Estimate: 0 Days</p>	<p>UST185</p> <p>...</p> <p>Priority: Due Date: Estimate: 0 Days</p>
<p>UST233</p> <p>...</p> <p>Priority: Due Date: Estimate: 0 Days</p>					<p>UST175</p> <p>...</p> <p>Priority: Due Date: Estimate: 0 Days</p>

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Stage 5: Upstream Process on Separate Board

The screenshot displays the Swift Kanban application interface. The top navigation bar is green and contains the breadcrumb: Admin >> All Projects >> Swift-Kanban Roadmap Planning >> Kanban Board. A 'Quick Links' button is on the right. Below this is a blue toolbar with icons for '+ Add Card', 'Collapse', 'Board Filter', 'Modify Process', 'Activity Log', 'Legend', 'Full Screen', and 'Refresh'. The main header is blue with the 'Swift Kanban' logo and navigation links: Dashboard, Projects, People, and Admin. A second green breadcrumb bar repeats the path: Admin >> All Projects >> Swift-Kanban Roadmap Planning >> Kanban Board. Below this is another blue toolbar with the same icons. The left sidebar shows a list of items with expand/collapse arrows, user avatars, and priority star ratings (e.g., UST97, UST90, UST5). The main content area is a list of items, each with an expand/collapse arrow and a label: General Roadmap, Metrics/ Analytics, Scrumban, Integrations, Enterprise Board, Platform Upgrade, and UI/UX Improvements.

Admin >> All Projects >> Swift-Kanban Roadmap Planning >> Kanban Board Quick Links

+ Add Card Collapse Board Filter Modify Process Activity Log Legend Full Screen Refresh

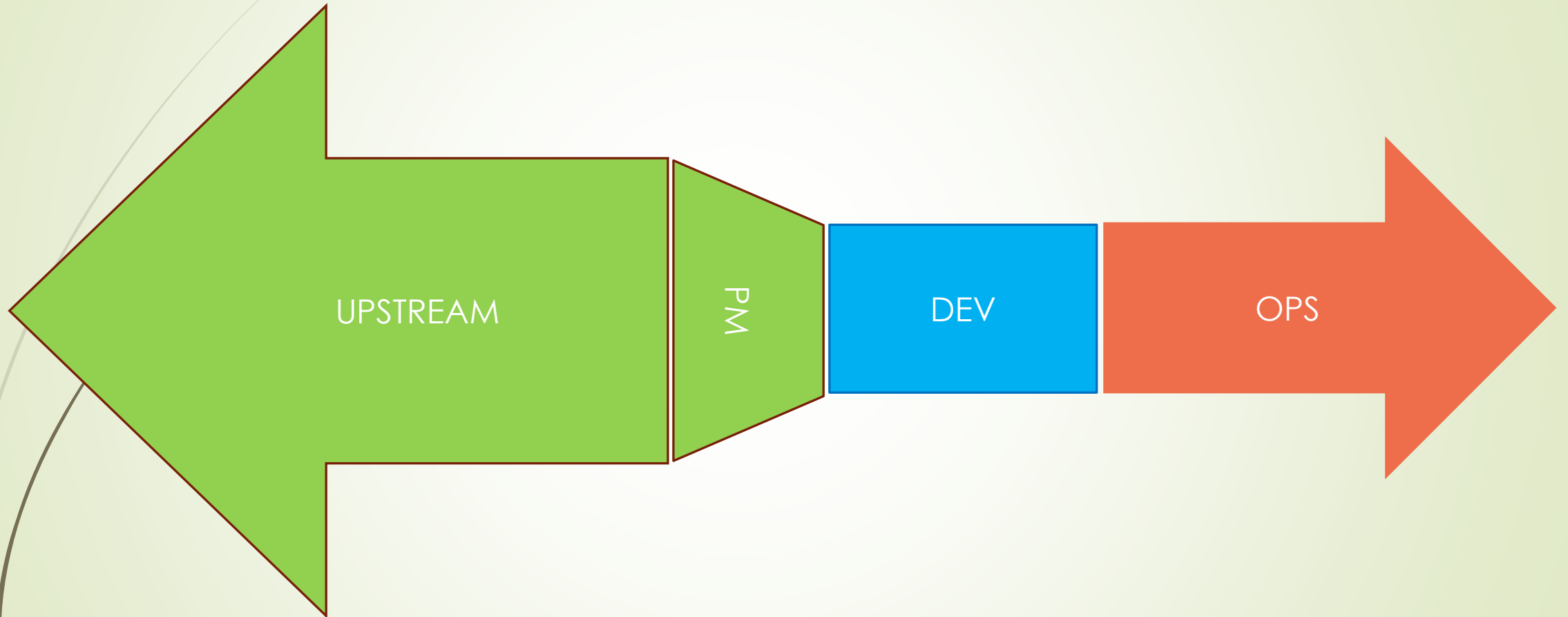
Swift Kanban Dashboard Projects People Admin

Admin >> All Projects >> Swift-Kanban Roadmap Planning >> Kanban Board

+ Add Card Collapse Board Filter Modify Process Activity Log Legend Full Screen Refresh

- >> General Roadmap
- >> Metrics/ Analytics
- >> Scrumban
- >> Integrations
- >> Enterprise Board
- >> Platform Upgrade
- >> UI/UX Improvements

Upstream is the GREATER Challenge!



Upstream Kanban gives voice to Product Management & others

- Reveals the complexity of Product Portfolio Management and Backlog Grooming
- Facilitates the collaboration needed between
 - Product Management and further upstream stakeholders AND
 - Product Management and Dev
- Ensures that the RIGHT stuff gets to the Dev team in the RIGHT detail at the RIGHT time
 - Minimizes ABORTs, Maximizes DISCARDS
 - Facilitates 2-Phase Commit better

Upstream Kanban improves Respect for Policies for Delivery Teams

- Creates greater understanding of Delivery team capacity/ capability
- Helps them respect WIP Limits – both Min and Max
- Gives a better understanding of Delivery Cadence – and hence more efficient Replenishment
- Helps manage the biggest challenge Dev teams typically face – overburdening/ large backlogs
- Ensures a smoother flow
- Provides both sides strong reasons to stay invested in Kanban!!!

In Summary -

Portfolio/ Upstream Kanban result in better Kanban implementations

Organizations that have implemented Portfolio and Upstream Kanban have benefited from –

- Longer lasting Kanban initiatives
- More effective start to their implementation with greater clarity of purpose
- Better understanding and use of the basic principles of the Kanban Method helping them move up the maturity curve and become less fragile
- Not affected by the departure of one or two individuals who might have been the initial champions for Kanban

Portfolio/ Upstream Kanban get Leadership more involved

Organizations with Senior Management involvement are more likely to –

- Have great organizational buy-in to Kanban
- Wider initial adoption of Kanban
- Better – and lasting – training in Kanban leading to better awareness of Kanban principles
- Which is probably because of better funding support for Kanban training and coaching
- Which lead to greater benefits from a deeper – and wider – implementation of Kanban

Portfolio & Upstream Kanban – Powerful Strategic Tool

“My feeling is that portfolio and upstream kanban have been especially useful since last month.

Because of the crisis, the company had to suddenly change strategies and defined a series of initiatives to navigate through these troubled times. That means a portfolio of initiatives that have to be tightly managed, with status shared across many areas/managers/directors.

SK is helping us to do this, and that is a great plus.”

- Leila Nakashima, Director – Planning & Strategy, Luiza Labs

Upstream Kanban – Critical for Managing (cross-)Team Priorities

*“Having implemented upstream Kanban has helped us tremendously in getting **our product management and design teams involved** in providing much greater clarity of the work to be done.*

*As a result, we are managing our intake much better than before and our WIP is being controlled very well. **So, lead time and throughput have improved much beyond our expectations....** management is happy!”*

- Sr. Program Manager (Engineering), Telecom customer

Questions?

Thank you!

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