

A Guide to the
KANBAN BODY OF KNOWLEDGE
(KBOK™ GUIDE)

1. Introduction

The Practical Implementation Guide for Managing Workflows using Kanban
(Includes Examples from popular digital Kanban tools, facilitates integration with other Agile frameworks,
and recommends ways to use AI for increased productivity.)

1 INTRODUCTION

Kanban is one of the most widely used Agile methodologies/frameworks for managing business Workflows and processes. This guide reviews how Kanban can be used to manage Workflows, support tickets, and support product development.

The key objectives of Kanban are to facilitate visualization of Workflows, limit work in progress, and optimize Workflows to deliver high business value in a short timeframe. To achieve these objectives, Kanban incorporates artifacts, such as a Kanban Board and a Kanban Backlog. The Kanban Board is created by the Kanban Manager and/or the Kanban Team. The Kanban Backlog is created by the Product Owner. These roles and their associated responsibilities are discussed in the Kanban Roles section of this guide.

1.1 Kanban Origin

Kanban Origins in Manufacturing

➤ Background: Post-War Japan (1940s–1950s)

After WWII, Japan's manufacturing industry needed to become highly efficient to rebuild its economy. Toyota, under pressure to compete with American car manufacturers (who had large production volumes), began exploring new production strategies.

➤ Taiichi Ohno – The Father of Kanban

Taiichi Ohno, an industrial engineer at Toyota, played a central role in developing what became known as the Toyota Production System (TPS). One of the innovations within TPS was Kanban.

Kanban means "signboard" or "visual card" in Japanese.

Ohno was inspired by how supermarkets managed inventory — they only restocked what was needed, when it was needed. He applied this idea to manufacturing. Kanban practices in Toyota included:

- Kanban Cards: Used as visual signals to indicate when parts needed replenishing.
- Pull System: Instead of pushing materials through the system, downstream processes would “pull” what they needed from Index
- Inventory Control: Helped minimize overproduction, one of the seven deadly wastes (*muda*) in lean manufacturing.

➤ 2000s – Kanban Enters Software Development

- Key Milestone: Adapted Toyota's principles to knowledge work
- Application: Track software Tasks in Agile development
- Focus: Flow efficiency, limit WIP (Work-In-Progress), continuous delivery

➤ **2010s – Kanban Goes Mainstream**

- Industries: Expanded beyond software to marketing, HR, education, finance, etc.
- Kanban Method: Formalized by David J. Anderson – 6 core practices:
 1. Visualize the flow of work
 2. Limit WIP
 3. Manage flow
 4. Make policies explicit
 5. Feedback loops
 6. Improve collaboratively
- Tools: Vabro, Trello, Jira, Asana, Monday.com, Clickup etc.

➤ **2020s – Digital Transformation & Scaling**

- Trend: Widespread use in remote and hybrid work
- Integration: AI and automation in Kanban tools

1.2 Kanban Application Areas

Apart from manufacturing, the application of Kanban has been extended to a variety of industries and applications, including software development, services, healthcare, education, retail, and more. David J. Anderson first adapted the Kanban principles for software development and documented this in his 2010 book (Anderson, 2010).

Although Kanban has a wide range of applications, it is important to understand that its principles and practices can be applied to existing Workflows and organizational processes. Kanban can be utilized by organizations across different industries for various areas of application, such as:

- Task management,
- Workflows automation,
- Business process management,
- Inventory management,
- Business operations management,
- Production planning,
- IT Service Management,
- Escalation Management etc.

Some prominent departments and functional areas where Kanban is widely used include:

- Business Analysis
- Customer Service
- Design
- Finance
- Human Resource
- Information Technology
- Learning and Development
- Legal and Compliance
- Marketing
- Operations
- Product Management
- Project Management
- Sales
- Strategy

Many digital Kanban tools and SaaS platforms offer pre-defined Workflows templates for each of these prominent solution areas. These AI-generated templates help teams set up Workflows with minimal effort, based on the actual work that needs to be planned and executed.

AI enhances Kanban Workflows by automating Task prioritization, predicting activity timelines, and identifying bottlenecks. It enables smarter resource allocation, improves decision-making, and provides data-driven insights, resulting in increased efficiency, reduced delays, and more adaptive, agile project management processes.

1.3 Benefits of Kanban

Kanban is a popular Workflows management method that helps teams visualize work, limit work in progress, and improve efficiency. Here are important reasons why Kanban is beneficial:

1.3.1 Better Workflows Visualization and Management

1.3.1.1 Visualizes Work

Kanban visualizes work by using a Kanban Board, which represents Tasks as cards that move across columns labeled with Workflows stages (e.g., "To Do," "In Progress," "Done"). Each card contains Task details, assignees, and deadlines, giving a clear picture of ongoing work. The board highlights bottlenecks, Task statuses, and team capacity in real time, ensuring smooth flow. By making work visible, Kanban improves collaboration, accountability, and efficiency, helping teams quickly identify issues and optimize their Workflows. Multiple Digital Kanban tools like Vabro, Trello, Jira, Clickup, or Asana enhance visibility by integrating analytics and automation.

1.3.1.2 Improves Transparency

Kanban increases transparency by visualizing the entire Workflows on a shared board, making Tasks, progress, and bottlenecks visible to everyone. Each Task has clear ownership, deadlines, and status updates, ensuring accountability. Work-in-Progress (WIP) limits prevent hidden inefficiencies, while real-time updates keep the team informed. This openness fosters better collaboration, trust, and decision-making, as everyone can see priorities, blockers, and capacity at a glance, leading to a more efficient and predictable Workflows.

1.3.2 Improved Efficiency and Productivity

1.3.2.1 Reduces Waste

Kanban reduces waste by identifying inefficiencies and eliminating unnecessary work. The visual board highlights bottlenecks, redundancies, and idle Tasks, enabling quick resolution. By focusing on a pull-based system, Kanban ensures teams work only on what is needed, avoiding overproduction. It also minimizes context switching, communication gaps, and resource misallocation, leading to a leaner, more efficient Workflows with higher productivity and faster delivery.

1.3.2.2 Encourages Faster and Continuous Delivery

Kanban encourages continuous and faster delivery by maintaining a steady, uninterrupted Workflows where Tasks move smoothly from start to completion. Unlike sprint-based methods, Kanban's pull system ensures that new work begins only when capacity is available, preventing bottlenecks. By visualizing Tasks on the board, teams can identify inefficiencies and optimize their processes. This results in frequent, incremental releases of work, allowing organizations to deliver value to customers faster while continuously improving quality and efficiency.

1.3.2.3 Enhances Focus

Kanban enhances focus by limiting Work in Progress (WIP), ensuring that team members concentrate on fewer Tasks at a time instead of multitasking. The visual board clearly shows priorities, reducing distractions and confusion.

With Tasks organized in columns, individuals can see what needs immediate attention, avoiding unnecessary context switching. Kanban's pull-based system lets team members start new work only when they have capacity, preventing overload. This structured approach helps maintain a steady Workflows, reduces stress, and increases efficiency. By fostering a clear, organized, and distraction-free environment, Kanban enables teams to stay engaged and deliver high-quality work faster.

1.3.2.4 Balances Workload

Kanban balances workload by visualizing Tasks and ensuring even distribution among team members. This helps prevent individuals from taking on too many Tasks at once, reducing burnout and inefficiencies. The pull-based system ensures that work is started only when capacity is available, preventing bottlenecks and idle time. By continuously monitoring the board, teams can identify workload imbalances and redistribute Tasks accordingly. Kanban also promotes real-time collaboration, allowing adjustments based on priorities and team availability. This structured approach optimizes efficiency, keeps productivity steady, and ensures that no team member is overwhelmed or underutilized, leading to a smoother Workflows.

1.3.2.5 Limits Work in Progress (WIP)

Work in Progress (WIP) limits in Kanban help by restricting the number of Tasks a team can work on at any stage, preventing overload and bottlenecks. By focusing on fewer Tasks at a time, teams improve efficiency, reduce multitasking, and speed up delivery. WIP limits also highlight Workflows issues early, ensuring a smooth and predictable process. This promotes continuous flow, better resource allocation, and higher-quality output, ultimately leading to faster project completion and improved team productivity.

1.3.2.6 Increases Accountability

Kanban increases accountability by making work visible on a shared board, where each Task has a clear owner and status. Team members take responsibility for their assigned Tasks, ensuring clarity on who is handling what. Work-in-Progress (WIP) limits prevent neglected Tasks, while real-time updates track progress. The pull-based system ensures that individuals commit to work only when ready, fostering ownership. This transparency encourages collaboration, trust, and responsibility, leading to a more efficient and accountable team.

1.3.2.7 Integrates with Artificial Intelligence (AI)

Kanban can integrate with Artificial Intelligence(AI) by automating Task management, predicting bottlenecks, and optimizing Workflows. AI-enabled analytics provide real-time insights into cycle times, team performance, and workload distribution, helping teams make data-driven decisions. Smart automation can prioritize Tasks, assign work based on team capacity, and send alerts for delays or WIP limit breaches. AI-driven forecasting predicts Workflows issues before they occur, ensuring smoother delivery. By reducing manual effort, improving accuracy, and increasing efficiency, AI-enabled Kanban systems help teams work smarter and deliver value faster.

1.3.3 More Flexibility, Adaptability and Scalability

1.3.3.1 Adapts to Changes

Kanban adapts to change by offering a flexible, pull-based Workflows that allows teams to adjust priorities in real time. Unlike rigid frameworks, Kanban has no fixed iterations, enabling continuous updates without disrupting progress. The visual board makes changes transparent, helping teams quickly reorganize Tasks and resources. Additionally, Kanban's data-driven insights help teams identify bottlenecks and improve processes dynamically. This adaptability makes Kanban ideal for fast-changing environments, ensuring teams can efficiently respond to new demands without compromising Workflows stability.

1.3.3.2 Works for Any Industry

Kanban works for any industry because it is a flexible, visual Workflows management system that adapts to different work environments. In software development, it helps teams track coding, testing, and deployment. In manufacturing, it optimizes inventory and production flow. In healthcare, it improves patient care coordination. Marketing teams use Kanban to manage campaigns, while HR departments track hiring and onboarding processes. Finance, education, and retail also benefit from its ability to enhance efficiency and reduce bottlenecks. With its visual Task tracking, WIP limits, and adaptability, Kanban ensures streamlined Workflows, making it effective for teams in any industry. Some tools, such as Vabro, include thousands of Kanban templates for various industries, which can be easily adapted to do any work within most companies.

1.3.3.3 Scalable

Kanban is highly scalable because it adapts to teams of any size, from small startups to large enterprises. It works at the individual, team, and organizational levels, allowing businesses to expand their Workflows without disrupting processes. Kanban's visual board structure remains effective whether managing a few Tasks or coordinating multiple departments. Work-in-Progress (WIP) limits ensure efficiency as workload scales. Digital Kanban tools integrate with AI and automation, supporting complex Workflows. As companies grow, Kanban enables seamless Workflows adjustments, cross-team collaboration, and continuous improvement, making it a powerful framework for scaling operations while maintaining efficiency and flexibility.

1.3.3.4 Supports Remote Work

Kanban supports remote work by providing a visual, collaborative, and flexible Workflows management system accessible from anywhere. Digital Kanban tools like Vabro, Trello, Jira, Clickup and Asana allow teams to track Tasks in real time, ensuring transparency and accountability, while automated notifications keep remote team members updated. AI-driven analytics help monitor performance and predict bottlenecks. With cloud-based access, integrations with communication tools, and real-time updates, Kanban ensures seamless coordination, making remote work more efficient, organized, and productive while reducing miscommunication and delays.

1.3.4 Continuous Improvement and Quality

1.3.4.1 Enables Data-Driven Decisions and Predictability

Kanban enables data-driven decisions and predictability by providing real-time metrics and analytics on Workflows performance. Key indicators like cycle time, lead time, Work-in-Progress (WIP) limits, and bottlenecks help teams identify inefficiencies and optimize processes. Cumulative flow diagrams, throughput analysis, and heatmaps offer insights into workload distribution and Task completion rates. AI-enabled Kanban tools predict trends, suggest optimizations, and automate reporting. By continuously tracking and analyzing data, Kanban helps teams make informed decisions, improve efficiency, allocate resources effectively, and enhance overall productivity, ensuring continuous improvement and better business outcomes. By continuously analyzing performance, Kanban enhances reliability and ensures smoother, more predictable project outcomes.

1.3.4.2 Encourages Collaboration

Kanban improves collaboration by visualizing work on a shared board, ensuring all team members have a clear understanding of Tasks, priorities, and progress. Real-time updates keep everyone informed, reducing miscommunication. Work-in-Progress (WIP) limits promote teamwork by encouraging members to focus on completing Tasks together before starting new ones. Digital Kanban tools integrate with communication platforms like Slack, Microsoft Teams, and Zoom, enabling seamless discussions. By fostering transparency, accountability, and shared responsibility, Kanban creates a collaborative work environment where team members can coordinate efficiently, resolve issues quickly, and continuously improve Workflows processes for better overall productivity.

1.3.4.3 Supports Continuous Improvement (Kaizen)

Kanban supports continuous improvement (Kaizen) by providing real-time visibility into Workflows. Regular retrospectives and feedback loops encourage incremental process refinements. By fostering a culture of experimentation, adaptation, and learning, Kanban helps teams continuously refine their processes, enhance productivity, and deliver higher-quality outcomes over time.

1.3.4.4 Enhances Customer Satisfaction

Kanban enhances customer satisfaction by ensuring faster, more reliable deliveries through an optimized Workflows. By continuously identifying and resolving bottlenecks, teams can deliver high-quality products and services more efficiently. Kanban's data-driven approach ensures that priorities align with customer needs, allowing for quick adjustments based on feedback. The system also supports continuous improvement (Kaizen), leading to consistent process enhancements. With better predictability, reduced lead times, and improved collaboration, Kanban helps organizations meet customer expectations more effectively, ultimately fostering trust and long-term satisfaction.

1.4 Why use KBOK™ vs. other Kanban Books or Bodies of Knowledge

1.4.1.1 Free download of KBOK™

To support growth and standardization in Kanban frameworks and knowledge, Kanbanstudy.com has made the Kanban Reference Guide (KBOK™) available for free on its website. Any Kanban practitioner or anyone interested in the field of Kanban can easily download and use the guide as a convenient reference for personal study or professional work.

Not sure about the quality of KBOK™? Just download it and see for yourself—*it's free!*

1.4.1.2 Free certifications, webinars, videos, study guides

The KBOK™ is supported on Kanbanstudy.com with free certifications, webinars, videos, and study guides—ideal for any professional seeking a fundamental understanding of Kanban or exploring a career in the field. The free certification will also give you a head start and recognition in the Kanban field.

Please visit www.Kanbanstudy.com for more details.

1.4.1.3 Practical, Contemporary, and supports AI

Most Kanban books and Bodies of Knowledge are overly theoretical, lengthy, and lack practical examples or explanations of contemporary concepts—such as how Artificial Intelligence (AI) or automation tools can be used by Kanban practitioners to work more effectively. However, KBOK™ is written with a focus on real-life issues and practical problems faced by Kanban practitioners, and how these can be addressed using modern tools and AI.

1.4.1.4 Practice Kanban in Real Life with Vabro.ai

Kanbanstudy has partnered with Vabro.ai—an AI-enabled SaaS platform—to practically demonstrate how the theoretical concepts taught in KBOK™ are applied using a real AI-enabled tool.

For more details, please visit www.Kanbanstudy.com.

1.4.1.5 80-20 Rule: (20% of KBOK™ is Sufficient)

Most Kanban books are overly comprehensive and expect readers to go through the entire content to understand key concepts. However, KBOK™ follows the 80-20 rule—meaning 80% of the core concepts can be understood by reading just 20% of the book. The remaining content can be referred to as needed when dealing with more complex Kanban tasks. All four process chapters—*Setup, Plan, Execute, and Enhance*—include mandatory inputs, tools, and outputs, and are ideal for those seeking a high-level understanding of Kanban. Similarly, the chapters on *Principles; Kanban Roles and Artifacts; Kanban Metrics and Reports; and Kanban Cadences and Collaboration* can be simply perused by those who want to learn the basics of Kanban. These essential sections make up only 20% of the book's content. The more detailed concepts are designed for experienced practitioners and can be easily accessed as needed while performing specific Kanban activities.

1.4.1.6 Well-Organized and Enjoyable to Read

Unlike other Kanban books or Bodies of Knowledge (BOKs), the KBOK™ is well-organized and engaging to read. Chapter 2 discusses the six principles of Kanban; Chapter 3 focuses on Kanban Roles and Artifacts; Chapter 4 covers Kanban Metrics and Reports; and Chapter 5 explores Kanban Cadences and Collaboration. The actual work performed by Kanban practitioners is structured into four chapters detailing the Kanban processes—Setup, Plan, Execute, and Enhance. These chapters include six processes that provide step-by-step guidance to help practitioners carry out their work effectively.

1.4.1.7 Applicable to Organizations of all Sizes and Industries

- The concepts in the Kanban Reference Guide (KBOK™) are applicable to the following:
Kanban initiatives in any industry
- Products, services, or any other outcomes delivered to stakeholders
- Kanban initiatives of any size or complexity

The Kanban concepts in KBOK™ can be effectively applied to initiatives across any industry—from small efforts or teams with as few as two members to large, complex initiatives involving thousands of team members across multiple teams.

1.4.1.8 Aligns with other Frameworks including Scrum, OKRs, DevOps

Unlike other Kanban books, which typically do not show how the Kanban function can interact with other popular frameworks such as Scrum, OKRs, DevOps etc., KBOK™ includes an Appendix to illustrate how the Kanban concepts align with other leading frameworks used by professionals in the industry.

1.4.1.9 Advanced Certifications for Senior Kanban Professionals

Multiple advanced certifications are available for senior Kanban professionals, based on the Kanban Reference Guide (KBOK™).

For more details, please visit www.Kanbanstudy.com.

1.4.1.10 Available in 6 languages

The Kanban Reference Guide (KBOK™), along with its courses and certifications, is available in six languages: English, French, German, Italian, Spanish, and Portuguese.

For more details, please visit www.Kanbanstudy.com.

1.4.1.11 2,000+ Partners in 50+ Countries, 300,000+ LinkedIn Group

Kanbanstudy.com has partnered with VMEdU Inc.—a reputable professional learning and certification company that also collaborates with well-known brands such as ScrumStudy.com, KanbanStudy.com, OKRStudy.com, 6SigmaStudy.com, and more.

VMEdU has over 2,000 Authorized Training Partners in 50+ countries, a LinkedIn group with more than 300,000 members, and more than 2,000,000 certified students. This positions us as a global leader in the professional education field.

For more details, please visit VMEdU.com or www.Kanbanstudy.com.

1.5 Purpose of the KBOK™ Guide

The Kanban method has proven to be a preferred approach for managing business Workflows and processes. This guide reviews how Kanban can be used to manage Workflows, support tickets, and product development.

The KBOK™ Guide serves as both a reference and a knowledge resource for experienced Kanban practitioners, as well as for those in product and service development—including individuals with no prior experience or knowledge of the Kanban approach. Its contents are organized for easy reference by the Kanban Team: Product Owner, Kanban Manager, and Kanban Team members.

Kanban is a non-prescriptive method, allowing for flexibility in its application. While not all of the Kanban processes detailed in the KBOK™ Guide are required for every initiative, they should be applied based on the specific needs of the organization, Workflows, project, product, or team.

The content of the *KBOK™ Guide* is also valuable for individuals preparing for the following Kanbanstudy™ certification exams:

- Kanban Essentials with AI Certified (KEC)
- Kanban Professional with AI Certified (KPC)
- Kanban Manager with AI Certified (KMC)
- Kanban Product Owner with AI Certified (KPOC)
- Kanban with Scrum, DevOps, and OKRs Certified (KSDOC)

1.6 Framework of the KBOK™ Guide

The KBOK™ Guide is divided into the following areas:

- Kanban Principles, covered in Chapter 2, expand on the six foundational concepts on which Kanban is based: Empirical Process Control, Iterative or Incremental Development, Collaborative Leadership, Value-Based Prioritization, Self-Organization, and Visualization.
- Kanban Roles and Artifacts are discussed in Chapter 3.
- Kanban Metrics and Reports are discussed in Chapter 4.
- Kanban Cadences and Collaboration are covered in Chapter 5.
- Kanban Processes, covered in Chapters 6 through 9, include the fundamental Kanban processes and their associated inputs, tools, and outputs.

1.6.1 Kanban Principles

Kanban principles are fundamental to the effective implementation of the Kanban method, applicable to various Workflows and organizational processes. These principles aim to optimize existing processes, foster collaboration, and drive continuous improvement. The key principles include:

- Empirical Process Control: Decisions are based on observation and data. Organizations refine current Workflows using Kanban to minimize resistance to change and support continuous improvement.
- Iterative or Incremental Development: Changes are implemented incrementally, allowing for course corrections based on stakeholder feedback and evolving Workflows understanding.
- Collaborative Leadership: Leadership is encouraged at all organizational levels, fostering a culture of shared responsibility, open communication, and continuous learning.
- Value-based Prioritization: Work is prioritized based on the value it delivers to customers, with a focus on understanding customer needs, business value, risks, and dependencies.
- Self-Organization: Teams are empowered to manage their responsibilities autonomously, promoting accountability, motivation, and effective decision-making.
- Visualization: Workflows are made visible through tools like the Kanban Board and Backlog, enhancing transparency, identifying areas for improvement, and enabling data-driven decisions.

Together, these principles support agile, adaptable Workflows that drive efficiency, collaboration, and customer-centric outcomes.

1.6.2 Kanban Roles and Artifacts

The key roles in the Kanban framework are those of the Kanban Team and Stakeholders. The Kanban Team is responsible for understanding the needs of the organization and implementing the Kanban method effectively. The three primary roles within the Kanban Team are Product Owner, Kanban Manager, and Kanban Team Members. Stakeholders—such as senior management, customers, suppliers, or any other individuals or teams who interact with or benefit from Kanban Workflows—collaborate with the Kanban Team to improve Workflow efficiency, help prioritize tasks, and ensure alignment with broader business goals.

Artifacts are visual or management aids that help teams visualize workflows and determine the best ways to optimize them to deliver high business value in the shortest time possible. Typical artifacts used in Kanban include Tasks and Task Groups, Kanban Workflows, Kanban Backlog, and Kanban Boards.

- Kanban Tasks are individual actions to be completed, while Task Groups are collections of related tasks necessary to achieve a specific output or goal.
- Kanban boards visually represent workflows, displaying tasks in columns to track progress, identify bottlenecks, and ensure smooth work execution.
- A Kanban backlog is a prioritized list of tasks or work items waiting to be processed, typically organized by urgency.
- Kanban Boards visually represent workflows, displaying tasks in columns to track progress, identify bottlenecks, and ensure smooth work execution.

1.6.3 Kanban Metrics and Reports

Kanban metrics and reports track team performance and workflow efficiency, providing insights into cycle time, throughput, and bottlenecks. These data-driven tools help teams make informed decisions to improve processes, optimize resource allocation, and enhance overall delivery speed and quality.

Metrics are used to help an organization understand the current state of Workflows and processes, which, in turn, assist the team in making informed decisions about changes that can bring improvements. Using metrics can also help an organization commit to and efficiently meet the service or product obligations of its customers, including factors related to time, cost, quality, risk, and scope. Some of the key metrics on which reports are based in Kanban include:

- Work in Progress (WIP) Aging Work in Progress (or Work Item Age)
- Cycle Time
- Throughput
- Lead Time
- Takt Time
- Queue Length
- Flow Efficiency

When applying the Kanban method within an organization, reports can be used to generate insights into Workflows and communicate work progress, issues, and risks to stakeholders. Many digital Kanban tools enable practitioners to leverage elaborate, AI-driven reports to make data-driven decisions. Some of the key reports used in Kanban are:

- Workflows Reports
- Team Reports
- Individual Performance Reports
- Cycle Time Reports
- Lead Time Distribution Reports
- Flow Efficiency Reports
- Throughput Reports
- Work in Progress (WIP) and WIP Aging Reports

- Cumulative Flow Diagrams (CFD)
- Blocker and Cluster Analysis Reports
- Capacity Utilization Reports
- Forecasting Reports
- Burndown Charts
- Service-Level Agreement (SLA) Adherence Reports

1.6.4 Kanban Cadences and Collaboration

Kanban cadences are regular meetings like standups, reviews, and planning sessions that promote collaboration, transparency, and continuous improvement within teams and across workflows.

Collaboration in Kanban involves shared visibility, real-time communication, and teamwork, fostering transparency, faster issue resolution, and continuous workflow improvement. It can be facilitated through transparent Kanban Boards, cadences or meetings, forms, dependency tracking, reports, and IT-enabled options such as chats, messages, comments, mentions, watches, and the sharing of files and links.

Some common Kanban Cadences include:

- Planning Meeting and Replenishment Meeting
- Kanban Team Meeting or Daily Stand-up Meeting
- Completed Work Item Review Meeting
- Retrospective Meeting
- Risk and Issue Review Meeting

Some methods to foster Collaboration in Kanban include:

- Forms
- Escalations
- Reports
- IT-enabled Collaboration

1.6.5 Kanban Processes

Kanban processes address the specific activities and flow of a Kanban initiative. In total, there are six fundamental Kanban processes that apply to all initiatives. These processes are grouped into four phases and are presented in Chapters 6 through 9 of the *Kanban Body of Knowledge*, as shown in Table 1-2. These Kanban processes are generally not sequential—they are iterative in nature and may overlap with one another.

Chapter	Phase	Fundamental Kanban Processes
For Entire Organization or Workspace:		
6	Setup	1. Determine Kanban Vision 2. Determine AI-enabled Kanban Tool (optional)

For Specific Kanban Initiative:		
7	Plan	3. Form Kanban Team 4. Optimize Workflows and Determine Stakeholders
8	Execute	5. Get Work Done
For Entire Organization or Workspace, and for Specific Kanban Initiative:		
9	Enhance	6. Retrospect and Improve

Table 1-1: Fundamental Kanban Processes

These phases describe each process including their associated inputs, tools, and outputs. In each process, some inputs, tools, and outputs are mandatory (those with an asterisk [*] after their names), while others are optional.

Whether to include the optional inputs, tools, and/or outputs depends on the particular initiative, organization, or industry. Inputs, tools, and outputs denoted with an asterisk are considered mandatory or critical to the successful implementation of Kanban in any organization.

1.6.5.1 Setup Phase

1. *Determine Kanban Vision*—In this process, the Product Owner(s) responsible for establishing and providing overall direction for Kanban activities within the organization or department are identified. The Product Owner(s) then create a Kanban Vision Statement, which provides overarching guidance, inspiration, and focus for setting up the Kanban function. The Kanban initiative can be introduced as a trial for select projects or Workflows within the company, or implemented across the entire organization for broader adoption.
2. *Determine AI-enabled Kanban Tool (optional)*— In this optional process, the Product Owners and relevant Stakeholders help to select an AI-enabled Kanban tool for the entire organization or for a specific department. In the absence of an AI-enabled Kanban tool, the Kanban Team can use manual methods to carry out their activities. AI-enabled Kanban tools enhance efficiency, accuracy, and decision-making by automating Tasks, analyzing vast datasets, and providing real-time insights. Companies have reported a 50%–75% increase in productivity and a 50%–80% decrease in costs when successfully completing Kanban initiatives using an AI-enabled tool that aligns with their Requirements.

1.6.5.2 Plan Phase

3. *Form Kanban Team*— In this process, the team responsible for implementing the Kanban Workflows is identified. The Kanban Team consists of the Product Owner, Kanban Manager, and Team Members. Together, they ensure the effective application of Kanban practices to optimize processes and outcomes.
4. *Optimize Workflows and Determine Stakeholders*—To effectively implement Kanban, it is essential to start by reviewing and understanding existing Workflows. This involves mapping current processes, identifying bottlenecks and delays, and assessing value streams.

To ensure a consistent and professional appearance in documents, aligning the footer of odd and even pages is essential. This involves setting the footer margins and placements so that they are symmetrical across all pages, whether odd or even. By maintaining uniformity, the document achieves a polished layout that improves readability and aesthetic appeal. Additionally, the footer can be customized to include information such as page numbers, document title, or other key details, ensuring they are positioned identically across the alternating pages.

By analyzing these elements, organizations can pinpoint areas where Kanban principles can be applied to streamline processes, reduce waste, and improve efficiency. Stakeholders in Kanban include the customers, leadership, project sponsors, and any individuals impacted by or influencing Kanban Workflow outcomes.

Determining stakeholders and involving stakeholders to optimize Workflows is crucial to ensure buy-in and facilitate smooth implementation. In this process, the Kanban Team and stakeholders work together to determine an improved Workflows for Kanban implementation. It is important to break down work into smaller, manageable units, such as Task Groups and Tasks. A visual Kanban Board should be created with columns representing different Workflows stages, such as “To Do,” “In Progress,” and “Done.” To prevent overloading and improve focus, work-in-progress (WIP) limits should be set for each column.

Clear Workflows rules and policies should also be defined to govern the movement of Work Items between columns and to handle exceptions. Continuous monitoring and improvement are critical; regular retrospectives and feedback loops help identify areas for optimization. By iteratively refining the Workflows, organizations can achieve significant improvements in efficiency, quality, and customer satisfaction through Kanban implementation.

1.6.5.3 Execute Phase

5. *Get Work Done*— In this process, the Kanban team regularly reviews the Kanban Backlog to prioritize upcoming work and assesses the Kanban Board to track tasks in progress. The team ensures that work items are clear, manageable, and ready to be pulled into the relevant To Do column when there is capacity. As tasks move through the Workflow, from To Do to In Progress and finally to Done, the team focuses on completing each item efficiently. Regular reviews help identify bottlenecks, optimize flow, and maintain a steady pace of output. Completed Work Items are the primary output, driving the team's overall progress.

1.6.5.4 Enhance Phase

6. *Retrospect and Improve*—The objective of this process is to review and reflect as a team to identify lessons on what went well, what didn't work as expected, and where improvements are needed. This involves examining how Task Groups and Tasks move through the Workflows to understand the Workflows, cycle time, and the areas where the flow is slowing down or getting stuck. It also includes refining the Kanban Workflows and gathering insights from stakeholders to ensure better support for team Workflows, aligning the Workflows with broader organizational goals, and addressing any service-level concerns. Additionally, it facilitates the use of quantitative data to implement improvements, monitor impact, and maintain a steady flow.

The Practical Implementation Guide for Managing Workflows using Kanban

The Kanban Body of Knowledge (*KBOK™ Guide*) offers guidelines for successfully implementing Kanban, a widely used Agile methodology for managing business workflows. Originally developed in manufacturing, Kanban is now applied across various industries and sectors, including software development, healthcare, education, human resource management, retail, sales and marketing, finance, and more. It works for organizations of all sizes, from small businesses to large enterprises.

The *KBOK™ Guide* is built on insights from thousands of workflows across industries, with significant input from the global Kanban community and the VMEdU® Global Authorized Training Partner Network, comprising over 2,000 companies in more than 50 countries. Its development was a collaborative effort involving experts and practitioners from diverse fields.

The *KBOK™ Guide* is a comprehensive yet easily accessible framework for managing workflows with Kanban. It includes practical examples of Kanban implementation using popular IT tools, helping readers apply the methodology in their organizations. The guide also covers how Kanban integrates with other Agile frameworks such as Scrum, DevOps, OKRs, and Lean. Recommendations about how Artificial Intelligence can be used to increase productivity in Kanban workflows are also included in the *KBOK™ Guide*.

The *KBOK™ Guide* serves as a resource for both experienced Kanban practitioners and professionals new to workflow management. It's also suitable for those with no prior Kanban experience. The widespread adoption of the *KBOK™ Guide* framework standardizes how Kanban is applied to workflows globally and significantly helps organizations improve their overall productivity and return on investment.

