Kanbanstudy
Targeting success

A Guide to the

KANBAN BODY OF KNOWLEDGE (KBOK™ GUIDE)

3. Kanban Roles and Artifacts

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.)

3 KANBAN ROLES AND ARTIFACTS

Kanban does not prescribe any new roles for an organization. However, organizations that successfully implement Kanban generally make use of the Kanban Team, which comprises the Product Owner, Kanban Manager, and Kanban Team Members. The Kanban Team is collectively responsible for effectively implementing the Kanban method.

3.1 Kanban Team

The Kanban Team is responsible for understanding the needs of the organization and implementing the Kanban method effectively. The three prominent roles within the Kanban Team are Product Owner, Kanban Manager, and Kanban Team Members.

3.1.1 Product Owner

The Product Owner, also referred to as Product Manager, Service Request Manager, Project Owner, or simply Owner, is the voice of the customer. Typically, the Product Owner is responsible for understanding customer needs and communicating those needs to the Kanban Team members. In initiatives involving large-scale efforts, there may be multiple Product Owners. Additionally, the Product Owner may sometimes take on the role of Kanban Manager for an initiative.

The key responsibilities of a Product Owner include:

- Gathering requirements and ensuring that the initiative's vision aligns with the needs of relevant stakeholders, the Product Owner is responsible for providing clarity and direction to the Kanban Team members.
- Tracking the progress of work using metrics such as cycle time, lead time, and throughput to monitor the team's performance and make prioritization decisions.
- Participating in continuous improvement activities to reflect on the effectiveness of Workflows or processes, including gathering feedback from stakeholders and identifying opportunities for improvement.

3.1.2 Kanban Manager

A Kanban Manager, also referred to as a Flow Manager, Service Delivery Manager, Collaborator, or Team Admin, is responsible for the proper implementation of the Kanban method to manage Workflows and processes. The Kanban Manager leverages Kanban principles to foster transparency, collaboration, and efficiency within the team (and the organization as a whole).

A Product Owner may also assume the role of Kanban Manager for an initiative. The Kanban Manager can add or change Kanban Team Members and is responsible for managing the Kanban Board. In certain situations, multiple Kanban Managers may be assigned to an initiative.

Some key responsibilities of a Kanban Manager include:

- Possessing in-depth knowledge and expertise in Kanban principles, practices, and techniques, and implementing core Kanban concepts (such as visualizing Workflows, limiting Work in Progress (WIP), managing flow, and continuous improvement).
- Reviewing the Task Groups and Tasks created by the Kanban Team Members on the Kanban Board, and helping the Kanban Team create Task Group Templates when needed, so the team can effectively replicate similar work.
- Facilitating regular meetings, such as Daily Stand-up Meetings or Kanban Team Meetings.
- Facilitating Retrospective Meetings to reflect on processes, identify areas for improvement, and implement changes to enhance quality and productivity.
- Training and helping teams overcome challenges and bottlenecks.

3.1.3 Kanban Team Members

Kanban Team Members, also referred to as Developers, Contributors, or Board Members, perform the actual work involved in delivering results to stakeholders. Kanban Team Members can directly create Task Groups and Tasks on the Kanban Board and then implement those Tasks to deliver the expected results. They contribute to the overall effectiveness and success of an initiative by consistently and efficiently delivering high-quality products and services.

Some of the key responsibilities of Kanban Team Members include:

- Visualizing the Workflows through the use of a Kanban Board and ensuring that all Work Items are represented on the board and moved across it to show real-time progress.
- Adhering to Work in Progress (WIP) limits agreed upon for each stage of the Workflows. WIP limits are typically imposed by specifying the maximum number of Tasks allowed in a column on the Kanban Board. Team Members focus on completing work before pulling in new items, which helps maintain a balanced flow and prevent work overload.
- Prioritizing Work Items, Tasks, and Task Groups on the Kanban Board.
- Setting dependencies between Task Groups and Tasks and estimating Tasks when needed.
- Managing the Workflows by addressing bottlenecks, delays, and dependencies.
- Communicating openly and collaborating effectively with other team members to share information about the status of work, dependencies, and any issues.
- Reflecting on the processes, identifying areas for improvement, and experimenting with changes to enhance productivity, quality, and collaboration.
- Taking ownership of the quality of their work and being accountable for delivering business value to stakeholders by ensuring that Work Items meet the specified Acceptance Criteria.

Figure 3-1 displays the Airtable "Employee onboarding" workspace that tracks team members, roles, emails, teams, onboarding Tasks etc. It includes sorting, filtering, color-coding, and sharing features for streamlined onboarding management across Leadership, Engineering, and Marketing.

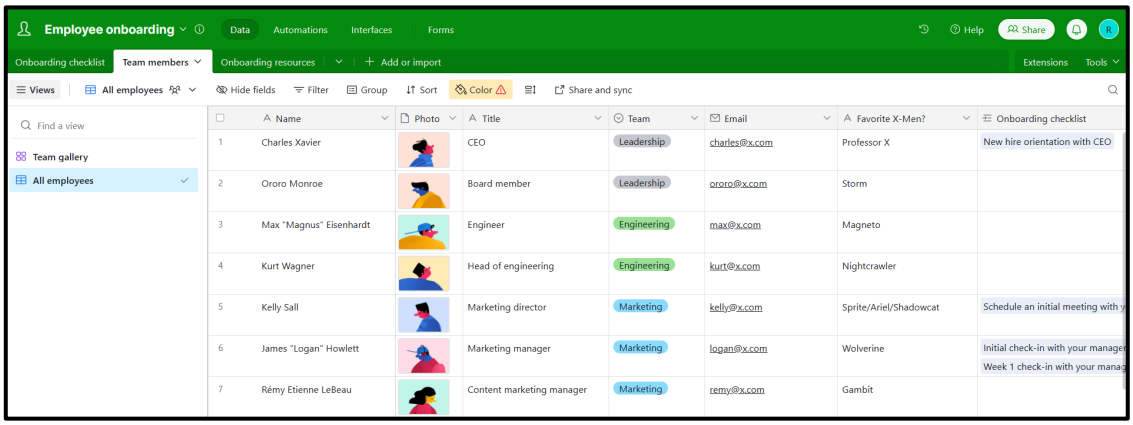

Figure 3-1: Organization Setup (Source: Airtable)

Figure 3-2 displays the VM Foods Marketing Team workspace on a platform (like Asana) displays an overview with curated work, members (SM, JD, ED), and goals. It allows adding team descriptions, resources, and new goals, facilitating collaboration and progress tracking towards objectives like increasing SEO marketing and improving brand image.

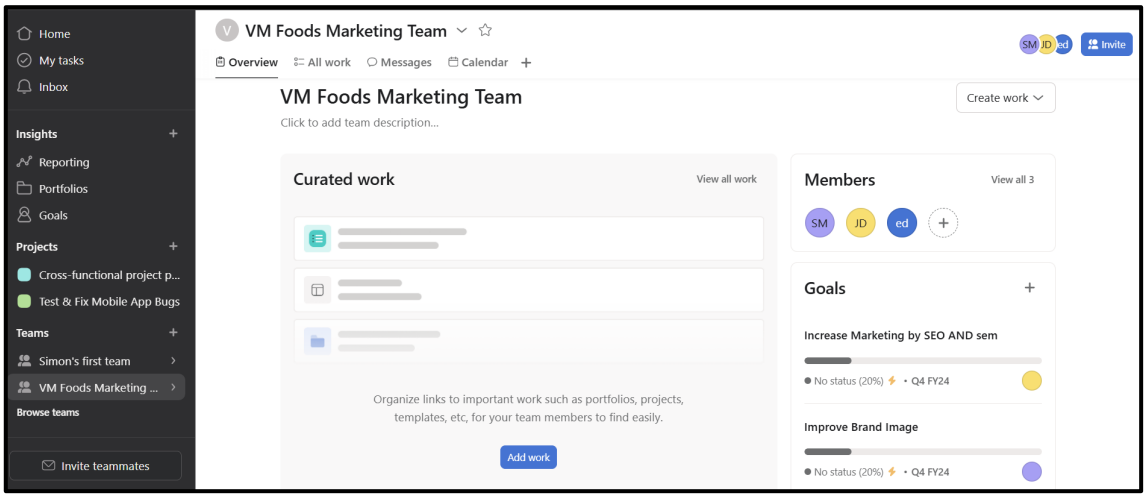

Figure 3-2: Setting up an Organization for Kanban (Source: Asana)

Figure 3-3 is an interface from Vabro, showing a Kanban template with "Team" details. It features tabs for team selection, fields for assigning Kanban Manager and members, and a comment section with threaded replies, facilitating team collaboration and communication within a Kanban initiative.

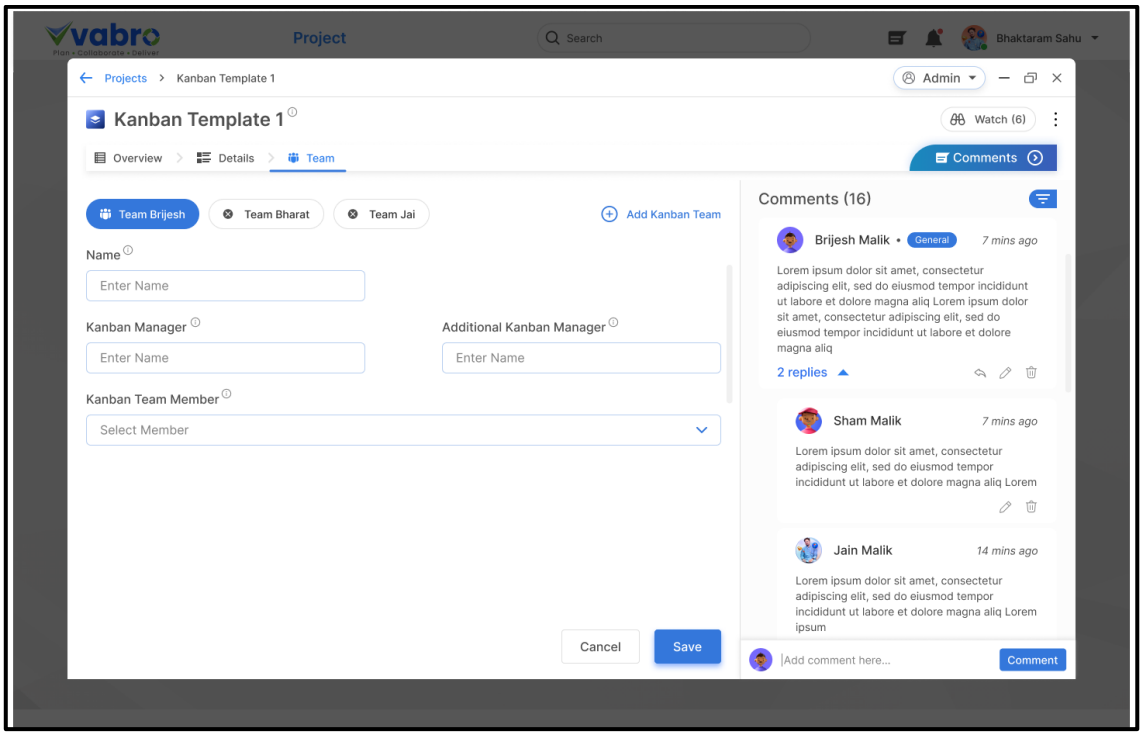

Figure 3-3: Preparing an Organization to adopt Kanban (Source: Vabro)

3.1.4 Stakeholders

Stakeholders of an initiative can include individuals, groups, and entities that can affect, be affected by, or perceive themselves to be affected by the initiative. In the context of a Kanban initiative, these stakeholders collaborate with the Kanban Team to influence Workflows efficiency, help prioritize Tasks, and ensure alignment with broader business goals. Stakeholders may include:

- Senior management will be responsible for defining the strategic direction, securing funding, and allocating resources for the Kanban initiative.
- Customers or end users will be responsible for collaborating with the Kanban Team to define and prioritize requirements and drive continuous improvement.
- External suppliers or service providers who contribute to various stages of the Workflows.
- Project and DevOps teams with whom the Kanban Team has dependencies.
- External customers, or internal and external teams, providing requirements for a Kanban Workflows.
- Any other individuals or teams interacting with or benefiting from the Kanban Workflows.

Effective communication with Stakeholders helps synchronize work across the Kanban initiative.

3.2 Roles and Responsibilities in Digital Kanban Tools or SaaS Platforms

Table 3-1 summarizes the key roles and their associated responsibilities in Kanban when using various digital Kanban tools or SaaS platforms:

Digital Kanban Tools or SaaS Platforms	Roles and Key Responsibilities
Vabro	• Product Owner: Gathers and prioritizes requirements, tracks progress, and participates in continuous improvement. • Kanban Manager: Configures boards, oversees Workflows, facilitates regular meetings, implements the Kanban method, and trains and mentors teams. • Team Member: Works on Tasks, and monitors progress. • Workspace Member: Has read-only access
Jira	• Product Owner: Prioritizes backlog. • Team Member/Developer/Contributor: Executes Tasks and provides updates.
Monday.com	• Owner: Oversees progress and goals. • Team Member: Updates statuses and completes Tasks. • Viewer: Has read-only access.
ClickUp	• Owner: Supervises Workflows. • Member: Handles Tasks and updates statuses. • Guest: Limited access to Tasks.
Asana	• Project Owner: Manages priorities and progress. • Collaborator/Team Member: Works on Tasks. • Guest: External collaborator with restricted access.
Azure DevOps	• Product Owner: Manages backlog. • Stakeholder: Observes and provides feedback. • Developer: Executes Tasks and updates statuses.

Table 3-1: Kanban Roles in Some Digital Kanban Tools

3.3 Kanban Artifacts

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

3.3.1 Tasks and Task Groups

Kanban Tasks are individual Work Items or activities represented visually on a Kanban Board. Each Task moves across columns that reflect stages in a Kanban Workflow. Kanban Task Groups organize related Tasks into categories like features, bugs, improvements, or epics, streamlining Workflow, prioritization, and collaboration across teams or projects.

Structure of a Kanban Task

A well-structured Kanban Task should include the following:

1. Title

- A short, descriptive summary of the Task.
- Example: Design homepage banner

2. Description

- A detailed explanation of the Task's purpose, context, and expectations.
- Include relevant background, links, mockups, or references.
- Example: Create a responsive banner for the homepage promoting the spring sale. Include two calls-to-action and align with the new brand guidelines.

3. Creator/Assignee

The default owner of Task Groups or Tasks is the Kanban Manager or Kanban Team Member who creates them. Kanban Tasks and Task Groups are not prioritized and are created directly on the Kanban Board by the Kanban Manager and/or Kanban Team Members. The Assignee is the person responsible for completing the Task Group or Task.

- Typically, in Kanban, the Creator and Assignee of a Task or Task Group are the same person.
- However, at times, some Kanban Tasks or Task Groups may be created by one person (the Creator) and assigned to another person (the Assignee). As per Agile principles, it is recommended that the Assignee voluntarily accepts the Tasks or Task Groups assigned to them by the Creator. Tasks should not be imposed on the Assignee; instead, the Assignee should take ownership of the work they choose to do.

4. Work Status

Columns on the Kanban Board are used to track the work status and completion of Kanban Task Groups and Tasks. Typically, a standard Kanban Board consists of six columns; however, the board can be modified to suit the information needs of the stakeholders. The Kanban Board can be adjusted by adding, editing, or removing columns.

The following seven column types are recommended for use on a standard Kanban Board:

- To Do—This consists of new Tasks when they are initially added to the board. These are Tasks that need to be completed but have not yet been started.
- Committed—This consists of Tasks selected for implementation. These are Tasks for which the team has clarity about the work to be done. These Tasks will be selected for implementation in the near future.
- In Progress—This consists of Tasks that team members are currently working on.
- On Hold—This consists of Tasks that are temporarily paused or delayed due to various reasons, such as external dependencies, resource constraints, or pending decisions.
- Escalate (Optional)—This consists of Tasks that need to be escalated to another Kanban Board or to another person or group (e.g., for approval)..
- Review—This consists of Tasks that are completed but are under review or evaluation by the team (or the Kanban Manager) to confirm if they meet the agreed-upon criteria.
- Done—This consists of Tasks that have been completed by the team. Tasks are considered complete when the team moves them to the "Done" column of the Kanban Board.

5. Priority

- Label or tag indicating urgency or importance (e.g., Low, Medium, High, Critical).

6. Due Date / Deadline

- When the Task needs to be completed.
- Helps with time-sensitive Workflows and planning.

7. Checklist / Subtasks

- Break down the main Task into smaller actionable steps.
- Example for a design Task:
    - Review branding guide
    - Create mockup
    - Get stakeholder feedback
    - Finalize and export files

8. Attachments

- Files, images, or documents necessary to complete the Task.

9. Labels / Tags

- Categories, teams, technologies, or departments related to the Task.
- Example: Marketing, UI Design, Urgent

10. Approvals

By default, approval upon Task completion is not required for Tasks or Task Groups. If approval is needed, the Kanban Manager or Kanban Team Members who created the Tasks or Task Groups should specify that approval is required from the Kanban Manager or Product Owner before a Task or Task Group is marked as complete.

11. Comments / Discussion

- A thread where team members can collaborate, ask questions, or provide updates.

Best Practices

- Keep Tasks small and specific to avoid confusion or delays.

- Limit work in progress (WIP) to reduce context switching.
- Review and update Tasks daily or weekly during stand-ups or retrospectives.
- Use color-coded labels and automation rules (in tools like Vabro, Trello, Jira, ClickUp) for efficiency.

Example: A well-structured Kanban Task

- Task Title: Implement User Login Functionality
- Description: Create a login form that allows users to sign in with their email and password. Include form validation and error handling.
- Due Date: April 11, 2024
- Creator/Assignee: Alex Martinez
- Tags/Labels: Frontend, Authentication, High Priority
- Status: In Progress
- Checklist/Sub Tasks:
    - Design login form UI
    - Implement frontend validation
    - Integrate with backend API
    - Add error messages for failed logins
- Attachments/Links:
- Design mockup
- API documentation
- Approval Required: Yes – Product Owner must review before marking complete.

Figure 3-4 shows a "Design Requests" board in Vabro, with Tasks categorized as "New," "In Progress," and "Complete," displaying Workflows details, deadlines, and assigned team members, indicating Workflows management.

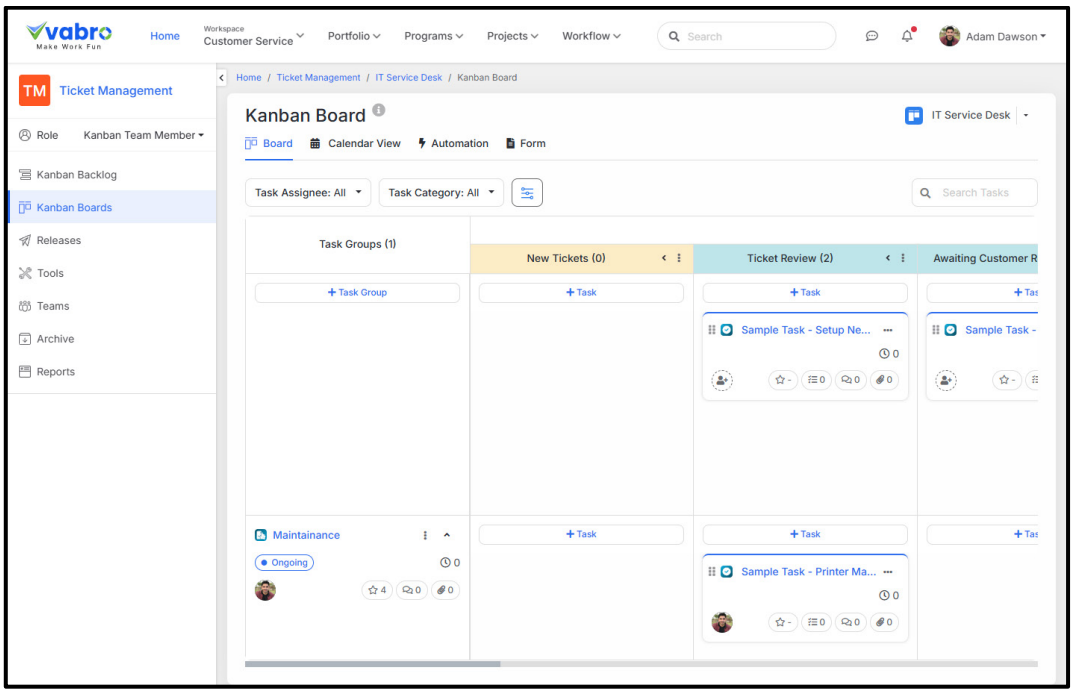

Figure 3-4: Kanban Board with Task Groups and Tasks (Source: Vabro)

Figure 3-5 shows a "Design Requests" board with Tasks in "New," "In Progress," and "Complete" columns, displaying Workflows details, deadlines, and assigned personnel, illustrating a Workflows management system.

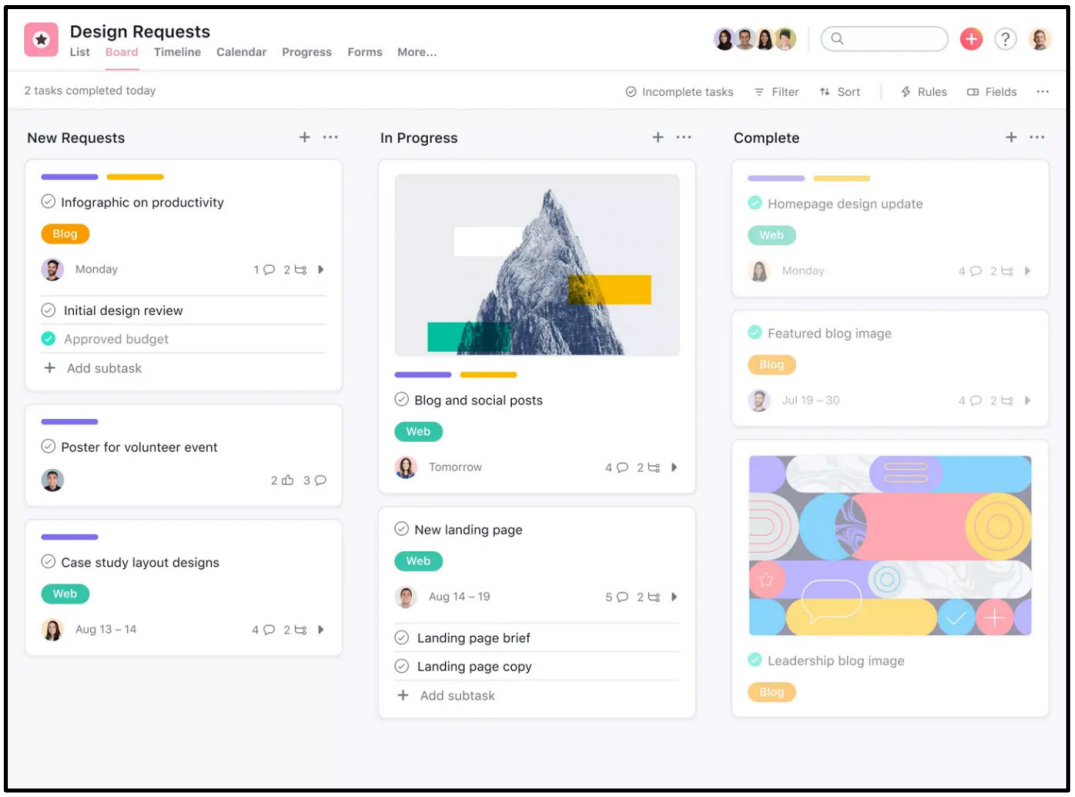

Figure 3-5: Illustration of Sample Kanban Board from Digital Tool (Source: Asana)

Figure 3-6 shows a Jira Kanban Board for "Beyond Gravity" software initiative, displaying Tasks categorized by status (To Do, In Progress, In Review, Done), with assigned team members and issue details.

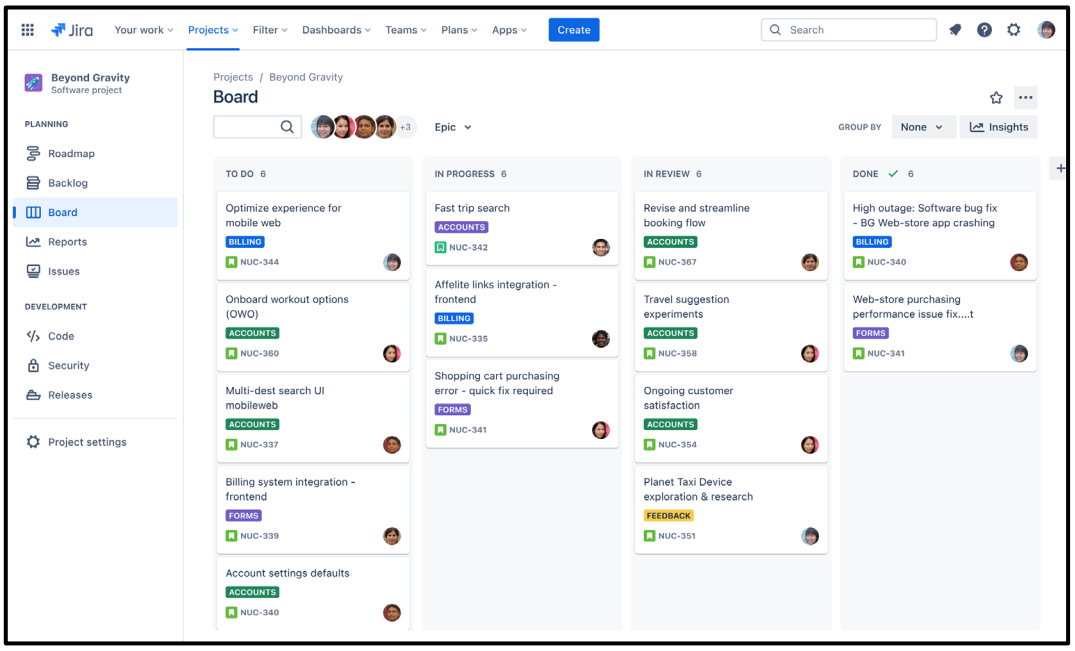

Figure 3-6: Sample Kanban Board (Source: Jira)

Figure 3-7 shows a Vabro Kanban Board with a pop-up window asking to "Send Task Group for Approval" for "Maintenance," indicating a Task management Workflows process.

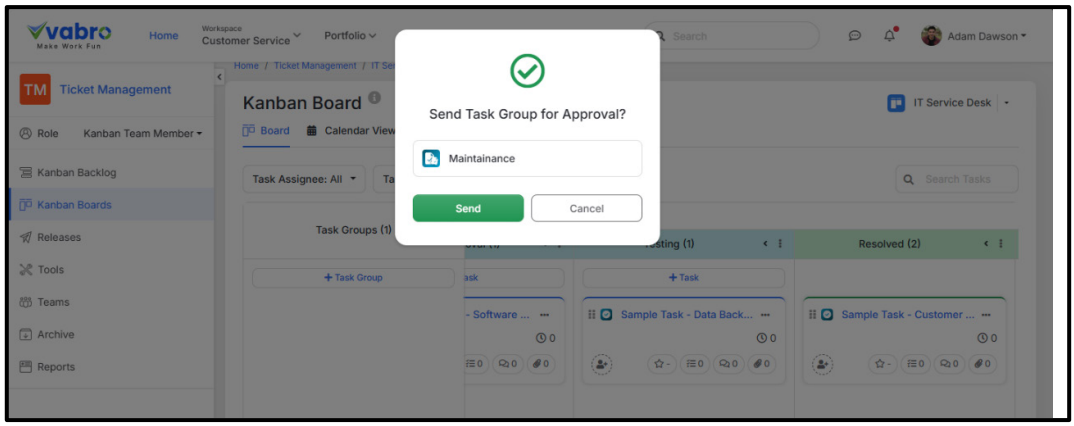

Figure 3-7: Steps in Task Group Review and Approval Process (Source: Vabro

3.3.1.1 Kanban Cards

Kanban cards are visual elements used on a Kanban Board to represent individual work items or tasks. Each card contains information about a specific task and helps teams manage and track work in progress through different stages of a Workflow.

Kanban cards are much more than just task notes — they are a core part of the Kanban methodology, enabling teams to manage work visually, collaboratively, and efficiently. Whether working on software development, marketing campaigns, operations, or any other Workflow, Kanban cards help ensure that nothing slips through the cracks and that everyone stays aligned on the progress of work.

The main goal of a Kanban card is to:

- Visualize work clearly and transparently.
- Communicate task details at a glance.
- Track progress as tasks move through Workflow stages (e.g., To Do → In Progress → Done).
- Limit work in progress (WIP) by showing how many tasks are active at any given time. A Kanban card typically includes the following information (though this may vary based on the tool or use case):

A Kanban card typically includes the following information (though this may vary based on the tool or use case):

Element	Description
Title	A brief summary of the task
Description	More detailed info on what needs to be done
Creator/Assignee	The person creating a Task or responsible for completing the Task
Work Status	Where the task is in the Workflow (often reflected by the card's position on the board)

Element	Description
Priority	Low, Medium, High – helps in focusing on critical tasks
Due Date	When the task should be completed
Checklist/Subtasks	Subtasks or steps to complete the main task
Attachments/Links	Designs, docs, specs, or related resources
Labels/Tags	Help categorize or filter tasks (e.g., "Bug", "Feature", "Backend")
Approvals	Specifies if approval required, and from whom
Comments	Space for collaboration or updates on the task

Table 3-2: Kanban Card Template

At times, some Kanban tools also allow tracking of the time taken by the assignee to complete specific tasks.

Figure 3-8 shows the task view that displays details for "Create UI components," including description, team, board, release, status ("To do"), and assignee options. It supports feedback-based development with no approval required.

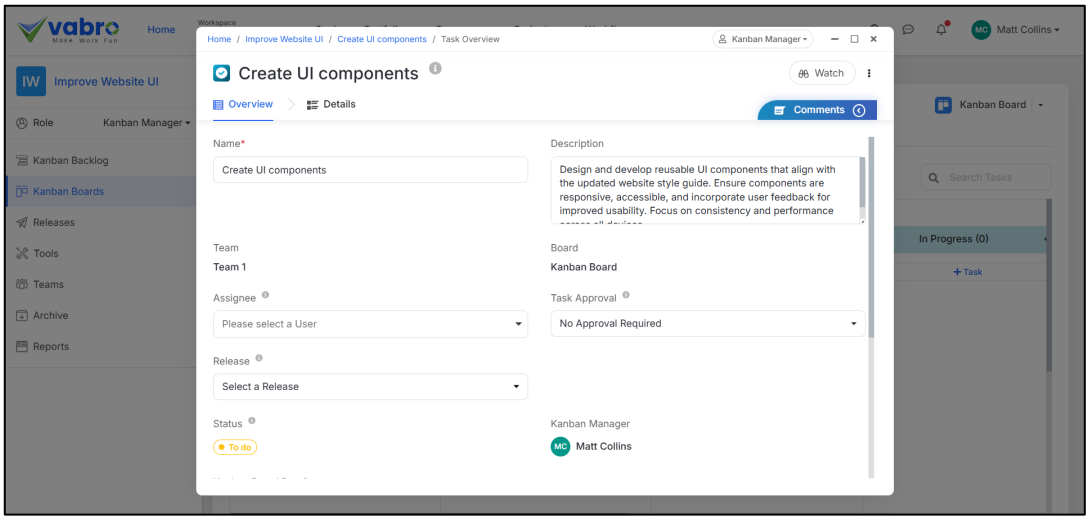

Figure 3-8: Sample Kanban Card (Source: Vabro)

Figure 3-9 shows a task management board that displays project statuses: To Do, In Progress, and Completed. The “Interactive Webinar” task is highlighted, marked completed with full progress and over 200 participants' feedback.

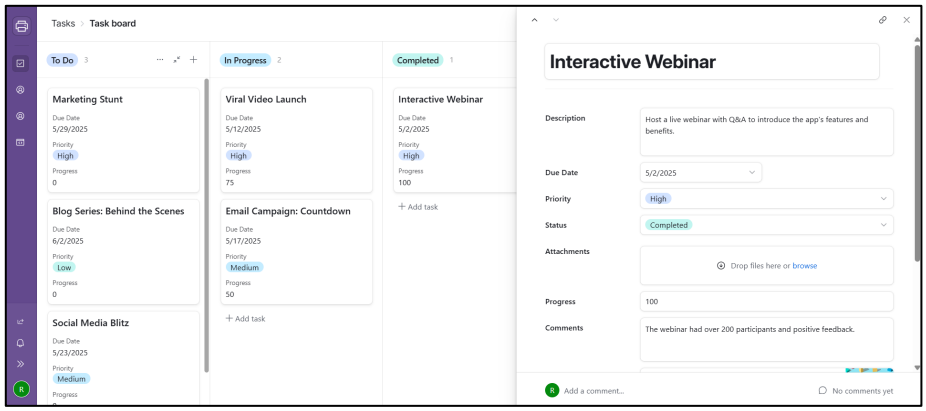

Figure 3-9: Kanban Card Template (Source: Airtable)

Figure 3-10 shows a lead tracking board that displays a single backlog task, “Collate Leads for March,” with medium priority. Task details panel is open, showing no assignee, Monday due date, and empty description field.

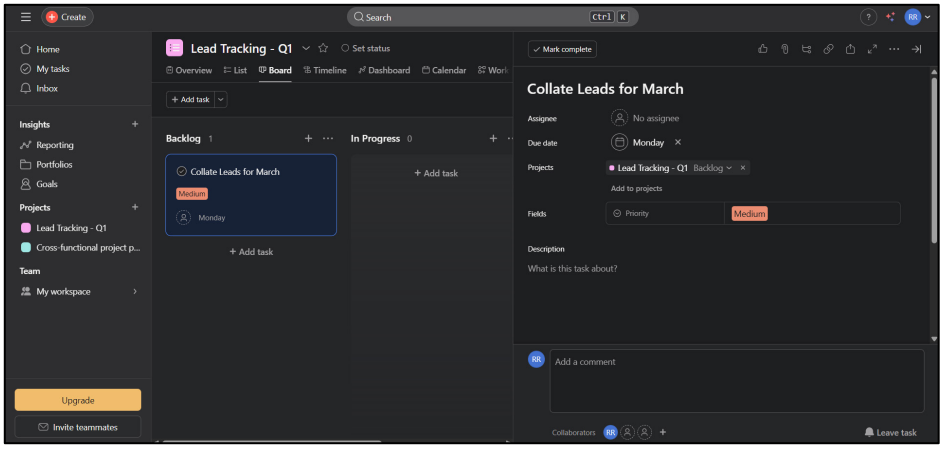

Figure 3-10: Kanban Card Template (Source: Asana)

Figure 3-11 shows the task view that displays “Account Setup” with a To Do status, high priority, and no description. Start date is 3/18/24. Options menu is open, showing task actions and sharing settings.

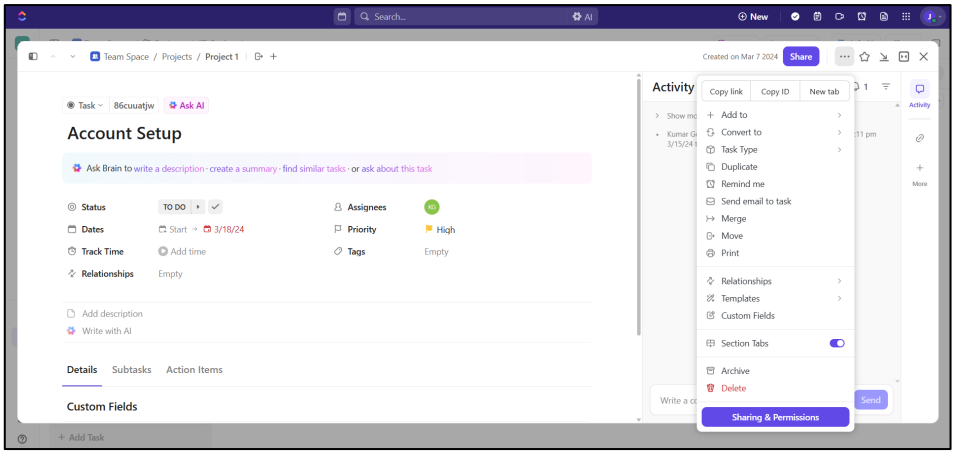

Figure 3-11: Sample Kanban Card (Source: ClickUp)

Kanban Cards in Practice

1. **Creating the Card:**
   - A team member identifies a new task and creates a card.
   - The card is placed in the "Backlog" or "To Do" column.

2. **Moving the Card:**
   - As work begins, the card is moved to "In Progress".
   - Once completed, it moves to "Done" or "Completed".

3. **Visual Feedback:**
   - Team members can instantly see what's being worked on, what's pending, and what's done.
   - Bottlenecks can be identified by observing where cards are piling up.

Digital vs Physical Kanban Cards

Physical Boards	Digital Boards
Cards are sticky notes or index cards on whiteboards	Cards are virtual and used in tools like Vabro, Trello, Jira, Monday.com, Clickup, Asana or Azure DevOps
Easy for quick brainstorming or small teams	Ideal for remote teams and large-scale collaboration
Limited automation	Supports automation (e.g., moving cards based on conditions)

Table 3-3: Digital vs Physical Kanban Cards

3.3.1.2 Upcoming Work Items

Upcoming Work Items in Kanban are Tasks or Task Groups, prioritized and ready to be pulled into the Kanban Workflows when capacity allows.

Kanban manages upcoming work by maintaining a prioritized backlog and using a pull-based flow, WIP limits, and regular backlog replenishment to ensure the team always works on the most valuable Tasks at the right time—never too early, never too late.

How to Manage Upcoming Work Items in Kanban

1. **Separate Column in the Kanban Board**
   This is the most commonly used approach to manage upcoming work in Kanban. Upcoming Work Items can be placed in a separate "Upcoming Tasks" column on the main Kanban Board. These items are then moved to the "To Do" column when the team has the capacity to work on them.
   This is a common and effective way to manage upcoming work in Kanban, especially for Tasks expected to be addressed in the near future.

2. **Using the Kanban Backlog**
   Upcoming Work Items may be created in the Kanban Backlog and are typically ordered by priority or value. Items move from the backlog into the Workflows (e.g., "To Do") when there is capacity (pull-based). The backlog is not time-boxed—work is pulled when ready, not scheduled in sprints.
   Although this approach is used in some Kanban tools, there are several disadvantages to using a Kanban backlog for upcoming work:

   Prioritization Can Become Blurry
   - A large Kanban backlog without strict prioritization rules can lead to confusion or constant re-prioritization, which wastes time and creates uncertainty.

   Delayed Feedback Loops
   - Without structured planning (e.g., well defined User Stories/Work Items or regular reviews), feedback loops may be slower or less deliberate, affecting alignment and quality.

   Overloaded Backlog = Cognitive Load
   - Since Kanban doesn't prescribe how to prune or groom the Kanban Backlog regularly, it can grow uncontrollably and become overwhelming.

   Work in Progress (WIP) Limits Might Not Cover Backlog
   - WIP limits typically apply to work already in progress, not to upcoming work in the backlog. This can lead to a "hidden" overload if backlog items pile up while waiting for attention. This often happens when the team chooses to leave upcoming Tasks in the backlog instead of moving them into WIP on the Kanban Board, making it harder to manage.

   Less Visibility for Stakeholders
   - Stakeholders accustomed to prioritized backlogs or clear release plans may find a Kanban backlog—with multiple upcoming Work Items—harder to follow unless there is a defined structure and regular communication.

3. **Using a specialized Prioritized Product Backlog**
   In tools such as Vabro, which offer well-defined Scrum and DevOps templates, upcoming work can be systematically organized and prioritized within specialized Prioritized Product Backlogs. These backlogs provide Product Owners with multiple options to create and manage User Stories, often using AI to accelerate the entire process. Once prioritized, the User Stories can be moved into the Kanban Workflows when the team has availability—where they are further broken down into Tasks and Task Groups.

   Key Benefits of this approach:
   - Keeps the main Workflows board clean and focused.
   - Allows for better prioritization and planning.
   - Supports just-in-time decision making, which is central to Kanban.

Pull System

- Instead of pushing Tasks onto the team, team members pull the next Work Item when they have capacity.

- This is based on Work In Progress (WIP) limits, which control how many items can be in each stage at once.
- Helps avoid overload and improves focus.

Replenishment or Commitment Point:

Upcoming Work Items are pulled into the Kanban Board:

- At regular intervals (e.g., weekly), the team holds a replenishment meeting.
    - During this meeting, items from the backlog are reviewed and moved into the "To Do" column or the first active stage.
    - This is the commitment point—once work is pulled in, it should flow to completion.
- Using explicit policies to decide when and how to pull work.
    - For example: “Only pull the next item if there are fewer than 3 Tasks in progress.”
- Using visual signals
    - Visual Signals on the board can help manage flow (e.g., color-coded cards, flags, swimlanes).

Continuous Flow

- Kanban allows work to be pulled in at any time, so it supports continuous delivery rather than time-boxed cycles.
- This makes it ideal for operational, support, or maintenance teams, where work is unpredictable.

3.3.2 Kanban Workflows

A Kanban Workflows is the end-to-end process that a Work Item follows from the moment it's requested to the moment it's delivered. It represents the sequence of steps a team uses to plan, execute, and complete work in a flow-based system. Keeping the Workflows transparent and lean is essential for successful and efficient work completion.

A key principle of Kanban is the visualization of the Workflows, which aids in its continuous improvement. Visualization is facilitated using the Kanban Board, which helps teams identify bottlenecks, optimize processes (e.g., by eliminating waste), and improve overall team efficiency and productivity.

A Kanban Workflows can have one or more Kanban Boards, which help visualize the entire Workflows. This is described in detail in Section 3.4.4.1.

Figure 3-12 shows Vabro Genie AI's workspace setup interface, highlighting recommended templates and Workflows for various departments, particularly Learning & Development.

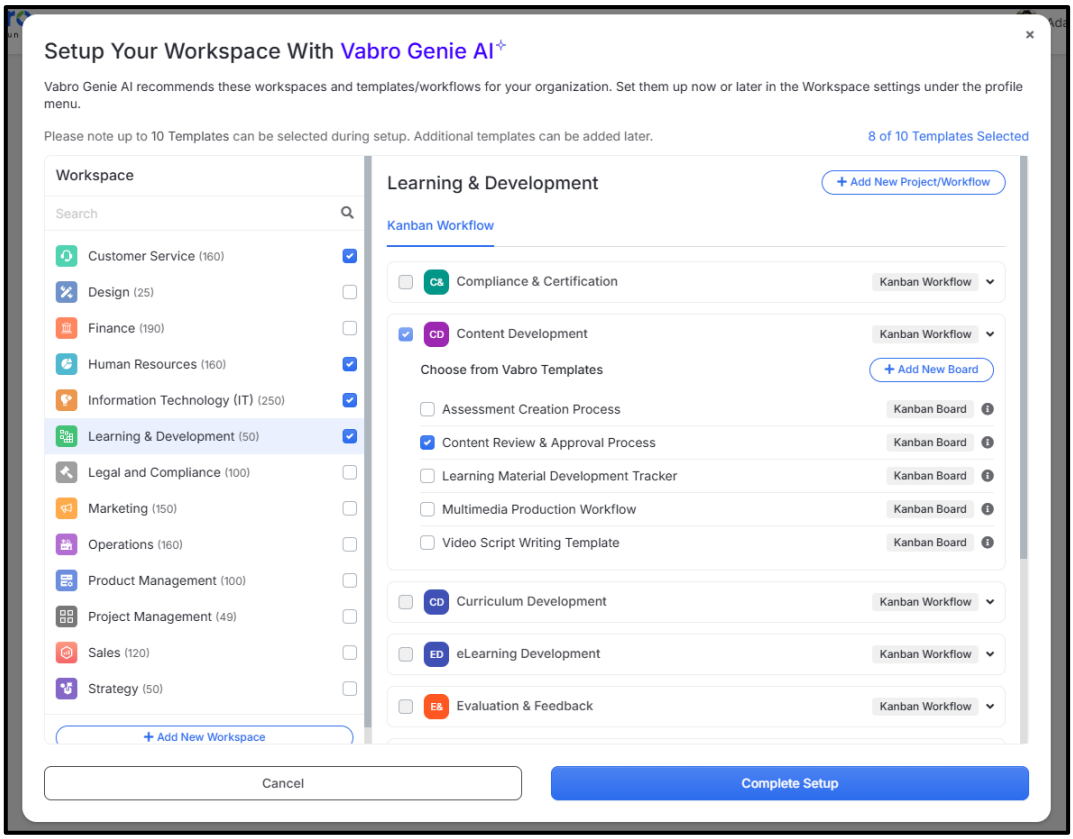

Figure 3-12: Illustration of Learning and Development Workflows (Source: Vabro)

Figure 3-13 displays template center, from ClickUp showcasing the templates for common HR Tasks, such as employee development plans, directories, engagement surveys, and expense reports, aiming to streamline HR processes.

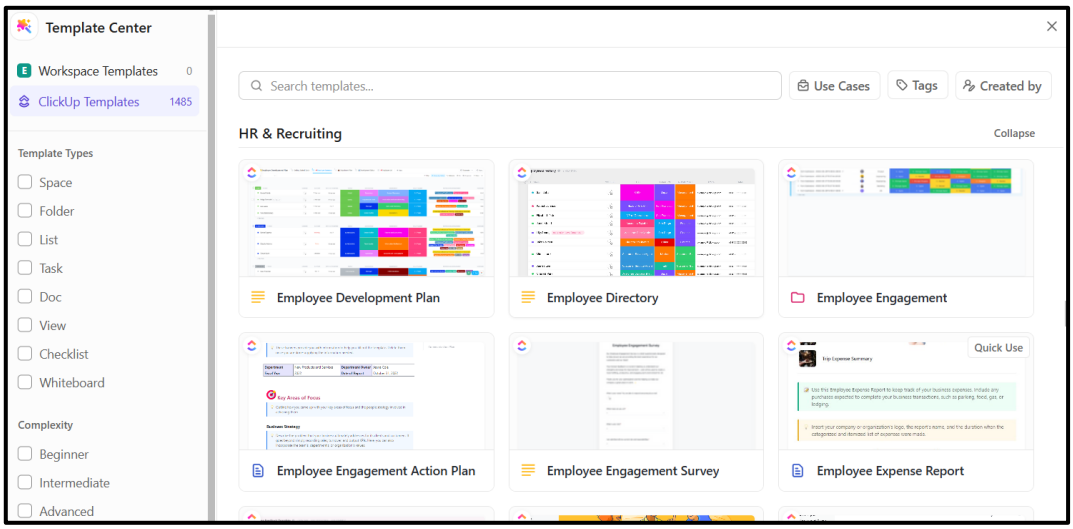

Figure 3-13: Selection of a Workflows and its Components (Source: ClickUp)

Figure 3-14 presents a Kanban-style Task management board with columns like "To Do," "In Progress," "On Hold," and "Questions." It helps teams organize Tasks, categorize Work Items using labels, and streamline their Workflows.

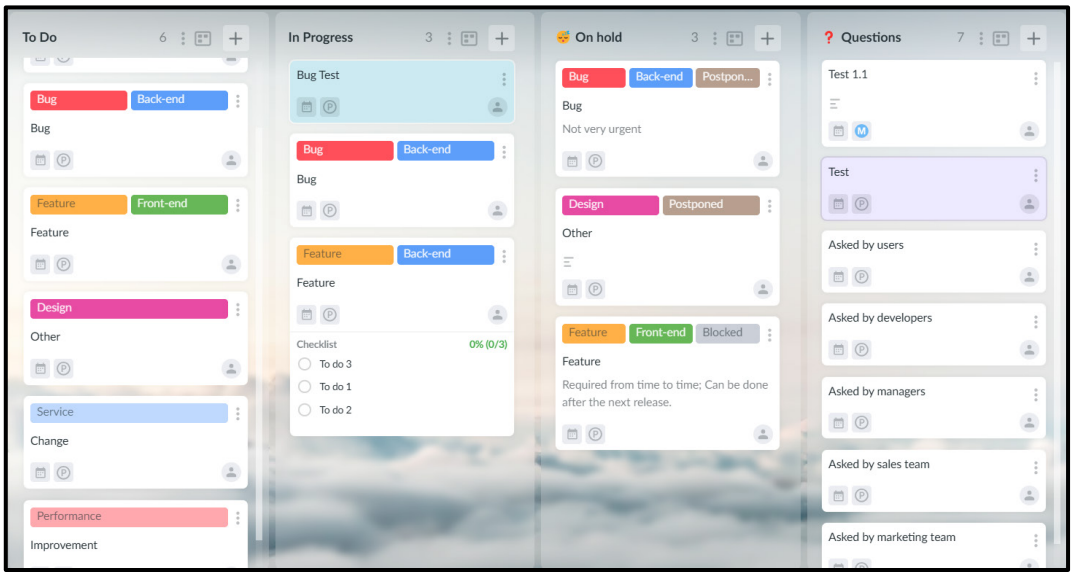

Figure 3-14: Use of Workflows in Kanban (Source: Kanbanchi)

Figure 3-15 shows the Workflows settings for "Expense Management" within a "Kanban Workflows management" system, detailing the various stages.

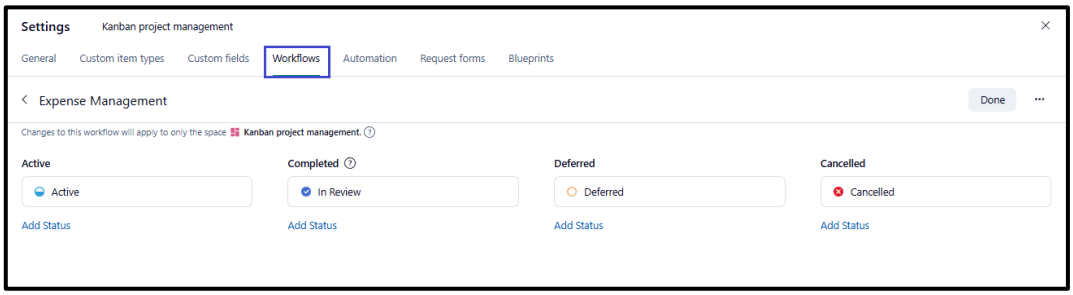

Figure 3-15: Workflows in Kanban (Source: Wrike)

3.3.3 Kanban Backlog

The Kanban Backlog is a dynamic repository of Task Groups or Tasks to be completed by the Kanban Teams involved in an initiative. It provides a clear understanding of what needs to be done and facilitates flexibility and adaptability among the Kanban Teams to respond to changing circumstances. Each Kanban Team will have its own Kanban Backlog.

The Kanban Backlog includes all the Task Groups and Tasks being worked on by the Kanban Teams that are part of the initiative. This offers an overview of all the work being performed by the relevant Kanban Teams. The Kanban Backlog can be organized by Tasks or Task Groups for better visualization and Workflows overview.

Typically each Kanban Backlog will have its own Kanban Workflows; also each Kanban Workflows can include one or more Kanban Boards, which are a visual representation of the Kanban Workflows.

Figure 3-16 shows a Vabro software interface for ticket management, displaying a backlog of Tasks assigned to team members.

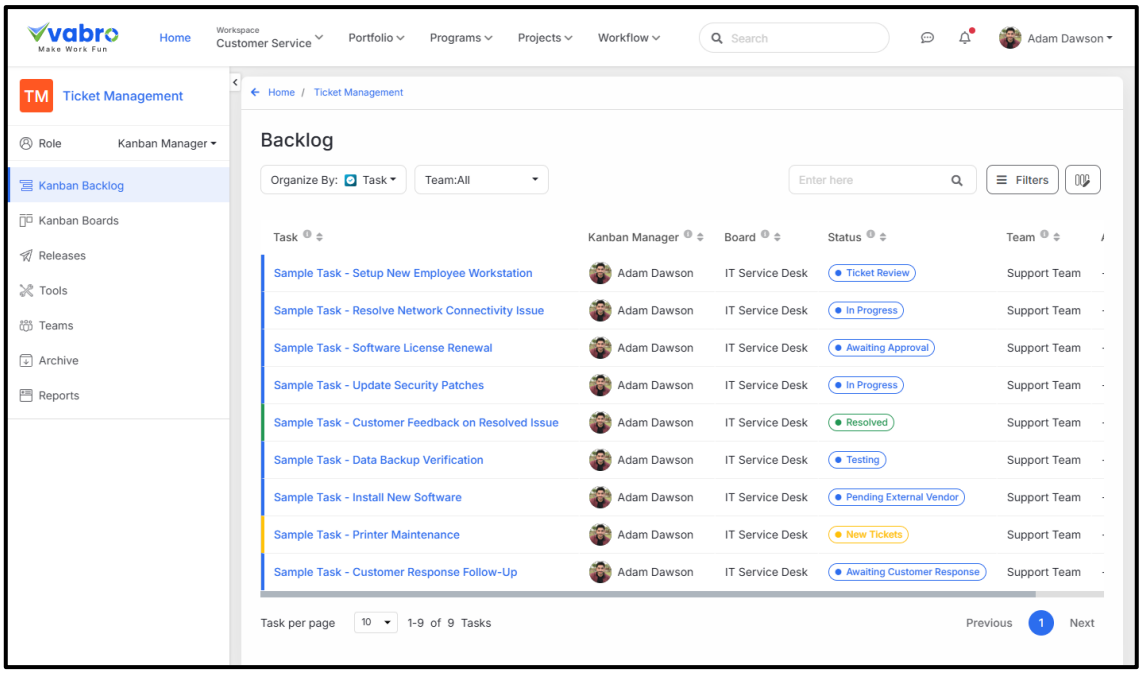

Figure 3-16: Digital Kanban Backlog with associated Kanban Boards (Source: Vabro)

Figure 3-17 displays a customer support ticket list in ClickUp, showing open and pending tickets with their details.

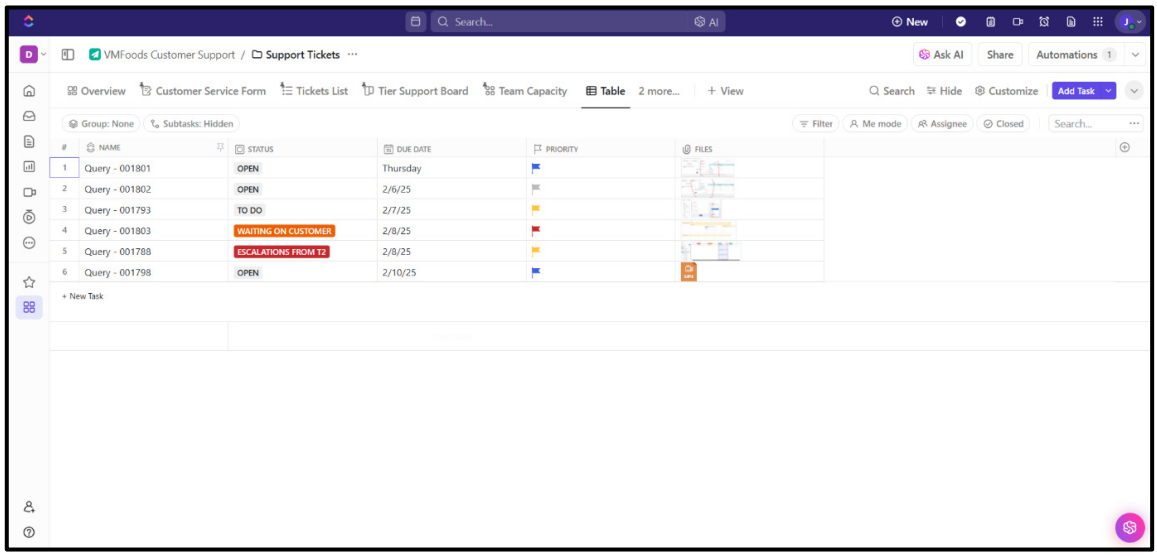

Figure 3-17: Illustration of a Digital Kanban Backlog (Source: ClickUp)

Figure 3-18 shows a Kanban Board in Basecamp tool with Tasks organized into "To-do," "In Progress," "In Review," and "Completed" columns.

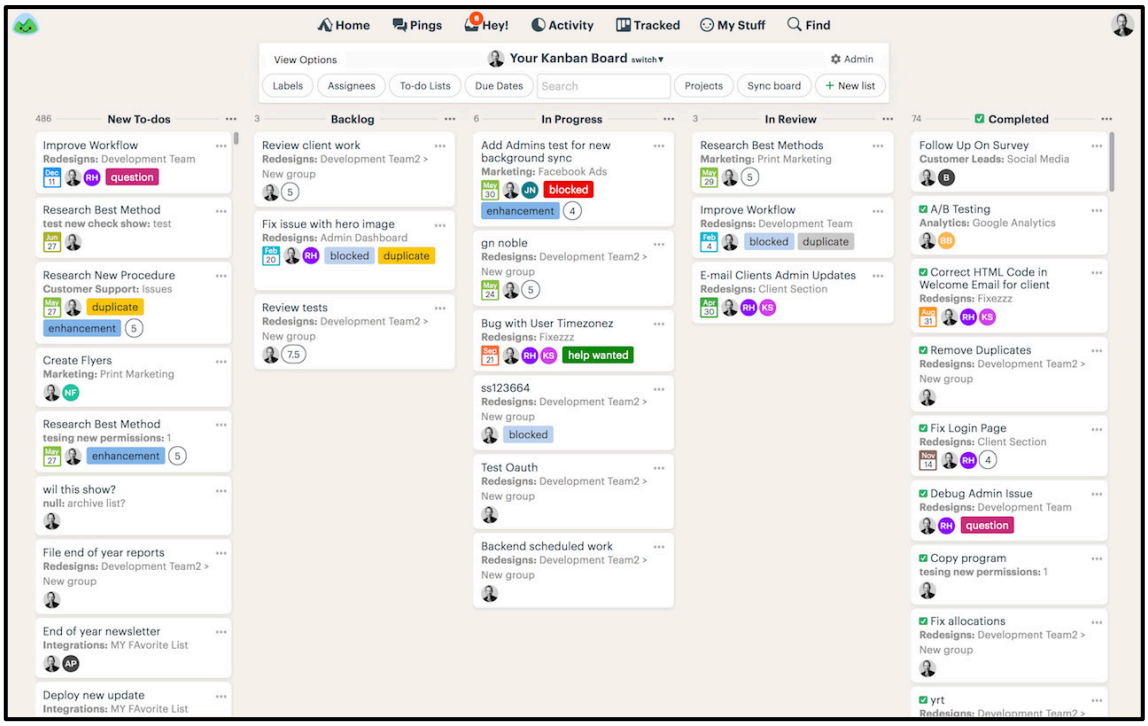

Figure 3-18: Sample Kanban Board (Source: Basecamp)

Figure 3-19 displays a Kanban Board interface of Notion, showing Tasks categorized as "To Do," "In Progress," and "Complete," with assigned team members and progress tracking for a design initiative.

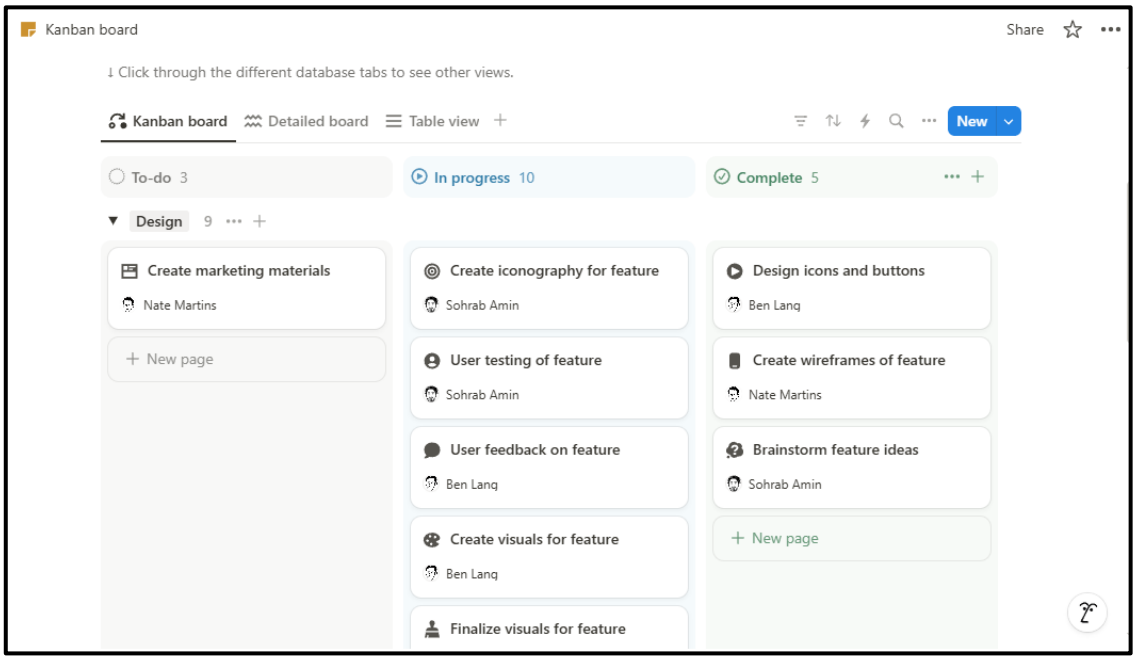

Figure 3-19: Sample Kanban Board (Source: Notion)

3.3.4 Kanban Boards

A Kanban board is a key component of Workflows. A Workflow represents the sequence of steps that task groups or tasks go through, from initiation and planning to delivery and completion. However, a Workflow may involve multiple Kanban boards, task groups, tasks, or activities that support service delivery or product development. A task is a set of action items or activities to be completed by a Kanban team member to whom the task is assigned. For example, designing the layout or creating a wireframe. A task group consists of multiple related tasks required to deliver an output or result in a product

A typical Kanban Board consists of multiple columns and rows, representing various stages a Task Group, Task, or Work Item goes through from start to completion. For example, columns on a Kanban Board might include 'To Do', 'Committed', 'In Progress', and 'Done'. Rows on the Kanban Board typically represent the categorization or grouping of work or Tasks based on features, categories, assigned persons, priority levels, and/or Task types. For example, categorizations could include Initiation, Requirements Gathering, Planning, Implementation, Review, and Closing.

Kanban Boards should allow the Kanban Manager and/or Kanban Team Members to directly add Work Items, Task Groups, or Tasks to the board. A Work Item can be an activity, a set of activities, a feature, or another piece of work that Kanban Team Members, collectively or individually, need to execute to fulfill a request or order. A Task Group includes a set of related Tasks to deliver a product, service, or feature. Task Groups can optionally be saved as Task Group Templates, allowing team members to easily create similar Tasks or Task Groups in the future. Tasks can be continually added to Task Groups by the Kanban Manager or team members. Tasks can also be broken down into subtasks, which are typically in the form of a checklist of activities that need to be completed to finish the entire Task.

Target dates can be added to the Task Groups and Tasks created on the Kanban Board. However, there are no target dates associated with subtasks. By default, Tasks and Task Groups do not require approval and can be managed and completed by the Kanban Team Members themselves. However, if needed, the Kanban Team Member implementing a Task can request approval from the Kanban Manager to confirm that the Task is complete. The Kanban Team Members can also specify any dependencies between the Kanban Tasks and other Tasks (from the same or another Task Group).

3.3.4.1 Kanban Workflows with multiple Kanban Boards

A Kanban Workflows can involve multiple Kanban Boards, especially in more complex processes or larger teams.

Using several Kanban Boards for one Kanban Workflows can help when:

- Different teams or departments have separate Workflows.
- Projects need to be tracked at both high-level and detailed levels.
- Teams want to separate personal Tasks, team Tasks, and cross-functional Tasks.
- Same Kanban Team is handling multiple product lines, clients, or services.

Examples of Multi-Board Setups

Team-Specific Workflows:

- Design Team Board
- Development Board

QA Workflows:

- Project Phase Boards:
- Backlog Grooming Board
- Sprint Planning Board
- Release Management Board

DevOps Workflows (with both Development and Operations Boards for the same team):

- One board for feature development
- Another for bug fixing
- Another for deployment/release Tasks

3.3.4.2 Swimlanes in Kanban Board

A swimlane is a visual aid used in various Workflows and processes to categorize and organize Task Groups or Tasks based on specific criteria. Swimlanes are represented as horizontal sections within Workflows management tools. In a Kanban Board, swimlanes are the horizontal sections that separate different Tasks and Task Groups. This is done by representing various dimensions, such as assigned person, process stage, priority level, or work type.

Swimlanes are horizontal rows on a Kanban Board that help to visually separate and organize Work Items based on a specific category or context—while still following the same vertical Workflows stages (like To Do → In Progress → Done). They are analogous to lanes in a swimming pool—different lanes for different types of Tasks, but all flowing in the same direction.

Swimlanes make it easier to:

- Group related work (e.g., by project, priority, team, feature, etc.)
- Track work for multiple teams on one board
- Highlight blocked or expedited items
- Separate business-as-usual Tasks from strategic initiatives
- Prioritize visually without breaking your Workflows

Common Swimlane Categories

By Priority

- Expedited
- High Priority
- Normal

By Team or Role

- Development
- Design
- QA

By Client or Project

- Client A
- Internal Project
- Mobile App

By Task Type

- Bug Fixes
- Features
- Maintenance

> *Swimlanes Example*:
>
> In a small software development initiative, swimlanes in the Kanban Board might be used to represent different stages of team activities, such as initiation, requirements gathering, planning, implementation, and closing.

Figure 3-20 presents a Kanban Board, displaying Tasks categorized by status. It shows Task details, progress, assigned team, and allows filtering/grouping, facilitating product management and Workflows visualization.

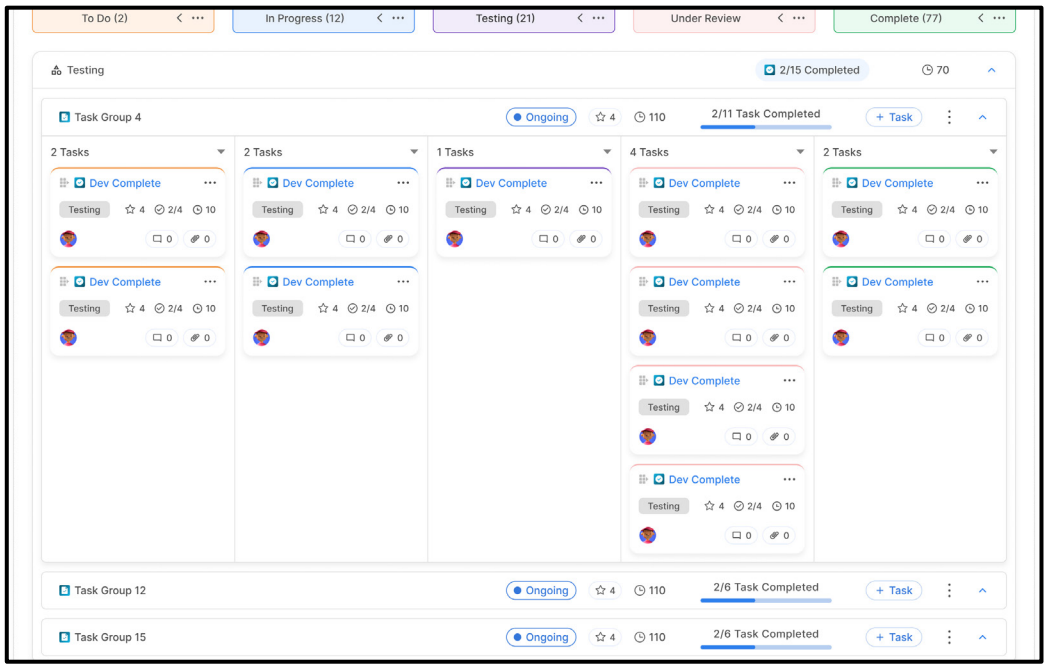

Figure 3-20: A Digital Kanban Board with Swimlanes (Source: Vabro)

Figure 3-21 presents an HR recruitment dashboard showing a "Candidate Status Board." It visualizes the hiring pipeline stages with candidate counts, enabling recruiters to track applicant progress and manage the recruitment Workflows efficiently.

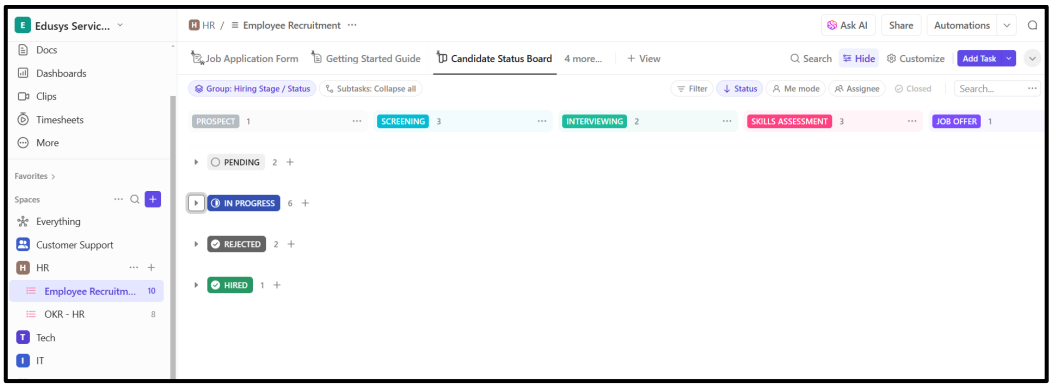

Figure 3-21: Digital Kanban Board (Source: ClickUp)

3.3.4.3 Using Kanban Boards to Manage Escalations

Using Kanban Boards to manage escalations in product management and project delivery can be highly effective for visualizing, tracking, and resolving issues as they arise. Escalations on a Kanban Board enable teams to transfer Tasks to specialized teams for quicker resolution. This ensures that bottlenecks are efficiently addressed, and Workflows stay on track. Escalations can be created at a Kanban Board level and exposed to team members working on the board. Escalations can be set up by the Kanban Manager for any Kanban Team.

Visualizing the Escalation Workflows:

- Create or Mark an Escalation Column: Add a dedicated column on the Kanban Board for escalations or create specific swimlanes for escalated issues on the primary Kanban Board. This enhances visibility and allows the team to prioritize escalated Tasks immediately.
- Select Destination Workspace and Board: If a column is marked for escalation, the destination workspace and the associated Kanban Board need to be selected. Escalations are sent with proper comments for context.
- Set Severity Levels and SLAs: Once the destination workspace and Kanban Board are selected, define severity levels and associated Service Level Agreements (SLAs) for escalations to ensure timely resolution.
- Escalation Setup and Approval: After the escalation request is configured from the source Kanban Board, the destination Kanban Board receives an escalation setup approval request. Upon approval, Tasks from the source board can be escalated to the destination board.
- Triggering Escalations: Kanban Team Members can escalate Tasks to the destination Kanban Board by moving Tasks to the Escalated column. This action triggers the escalation, and an instance of the Task is created on the destination board. Tasks requiring approvals could also be escalated to a single person or a group of persons.
- Status Updates and Notifications: Once the Kanban Team Member at the destination board completes the escalated Task, a status update notification is triggered to the source Kanban Board. This ensures that the originating team stays informed about the Task's progress and resolution.

This structured approach to managing escalations through Kanban Workflows helps maintain process efficiency, reduces delays, and fosters accountability across teams.

Figure 3-22 shows a digital dashboard for IT request management in Smartsheet. It displays various IT-related requests categorized by their status, such as *Received*, *Assigned*, *In Progress*, and *Completed*.

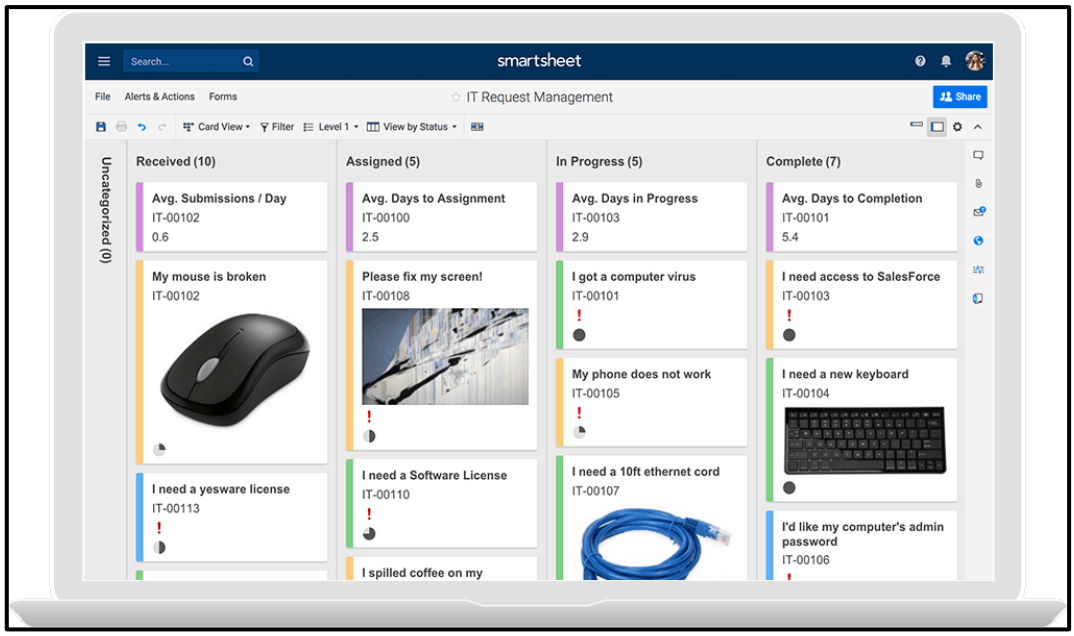

Figure 3-22: Sample Kanban Board (Source: Smartsheet)

Figure 3-23 shows Nifty's Workflows management board for the "Q2 Marketing Campaign", with Tasks organized by status columns such as *Campaign 1*, *Campaign 2*, *Editor Review*, and *Completed*. It displays various marketing activities, including deadlines and assigned team members, illustrating a collaborative Workflows for efficient campaign execution.

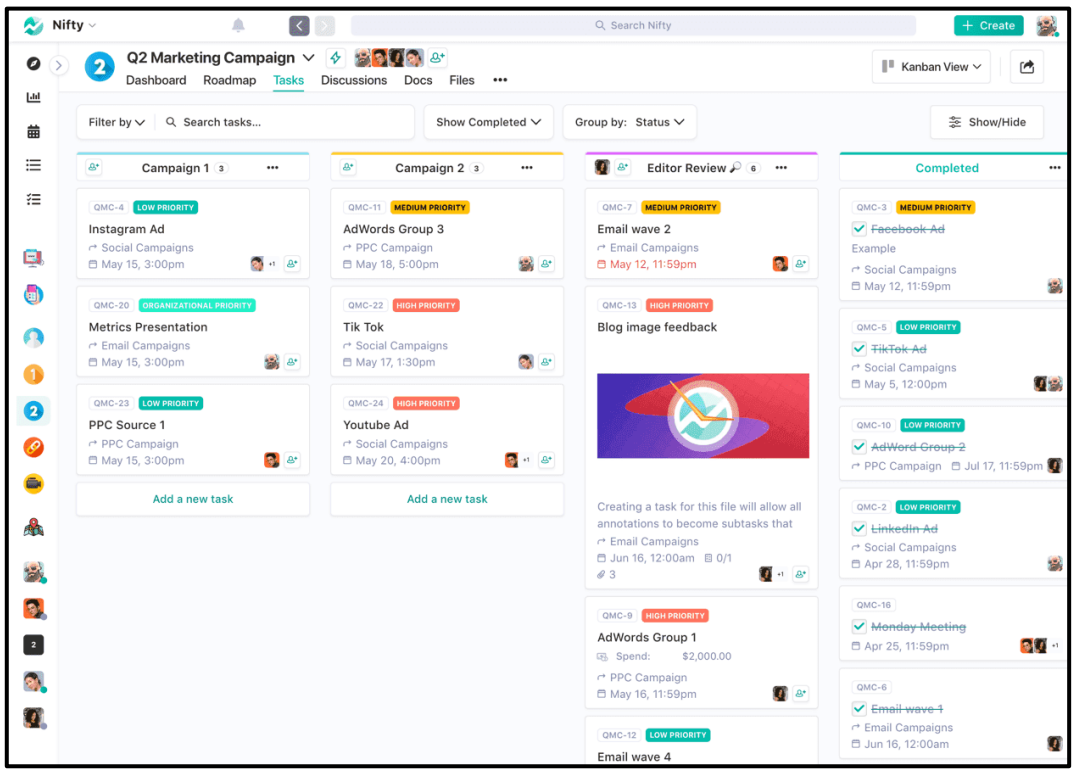

Figure 3-23: Sample Kanban Board (Source: Nifty)

Figure 3-24 shows the Vabro software interface displaying a ticket management backlog. It lists various Tasks with details such as assigned team members, status, and priority, indicating a system for tracking and managing support tickets or Tasks.

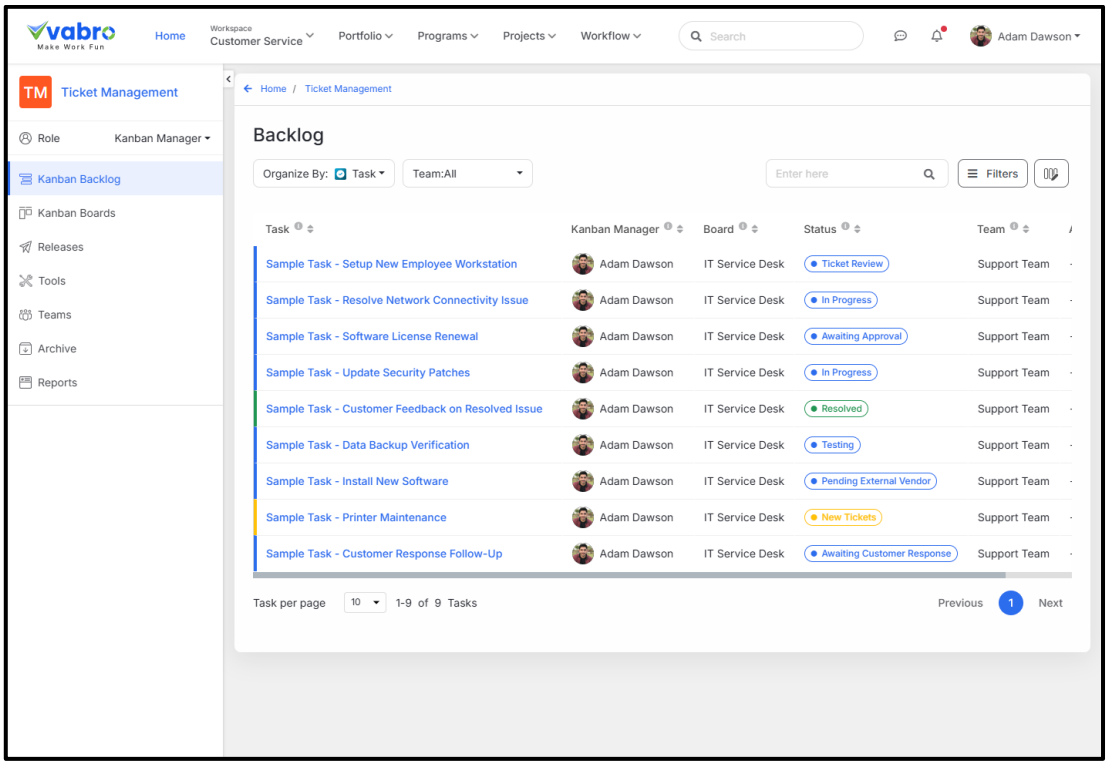

Figure 3-24: Kanban Backlog Setup Process (Source: Vabro)

Figure 3-25 above shows a candidate tracking system in ClickUp with two open positions: Project Manager and Operations Manager. Each position lists applicants and their progress in the hiring process. The system displays details such as contact information, current hiring stage, salary expectations, and application status, enabling efficient management of the recruitment pipeline.

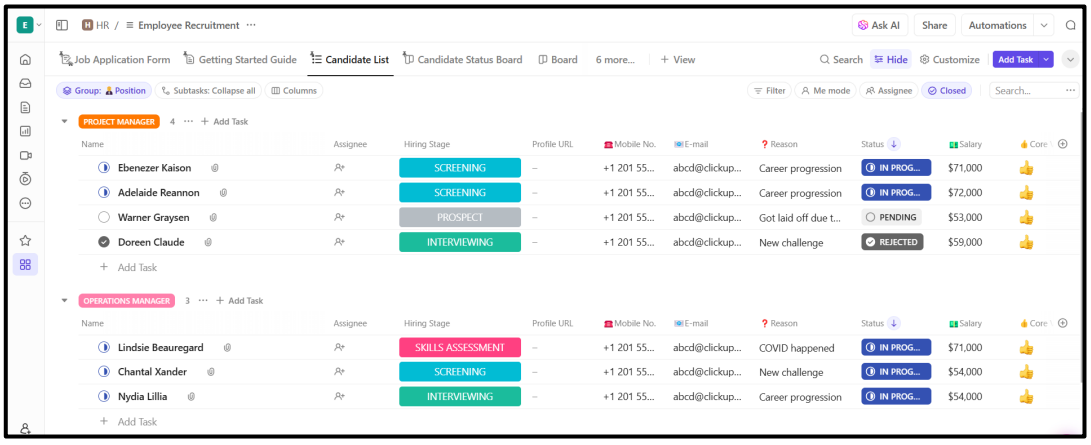

Figure 3-25: Sample Kanban Backlog (Source: ClickUp)

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.

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ISBN 979-8-9898916-1-0
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