


Now You See It!

Observing Flow Using Kanban Boards

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- Large Commercial & Government Projects
- Kanban Coach / DevOps Engineer
- Kanban Trainer / SpecFlow Trainer
- Performance & Scalability Architect
- Certified Ethical Hacker
- New York & Washington DC Area



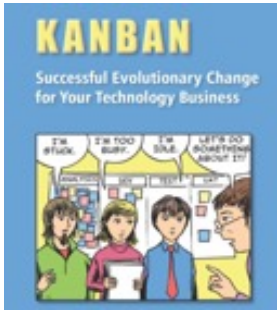


HOMELAND 

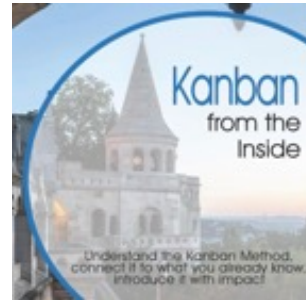
WHAT HAPPENED
TO YOU?



Learning Kanban



Change
Leadership
Masterclass



Kanban Coaching
IT Department



Introduced Kanban Practices
FBI Scrum Team

2014

2015

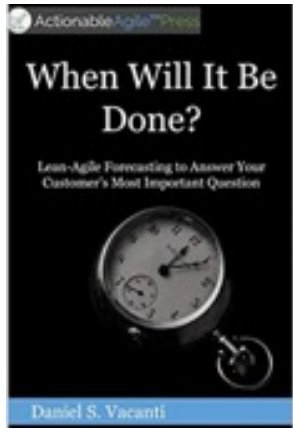
2016

2017

2018

2019

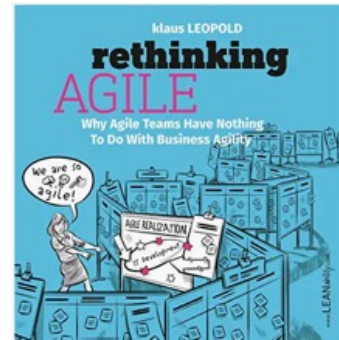
Learning More Kanban



Metrics & Forecasting
Troy Magennis
Focused Objective



Okaloa Masterclass
Patrick Steyaert



Klaus Leopold



KMM/KCP Class

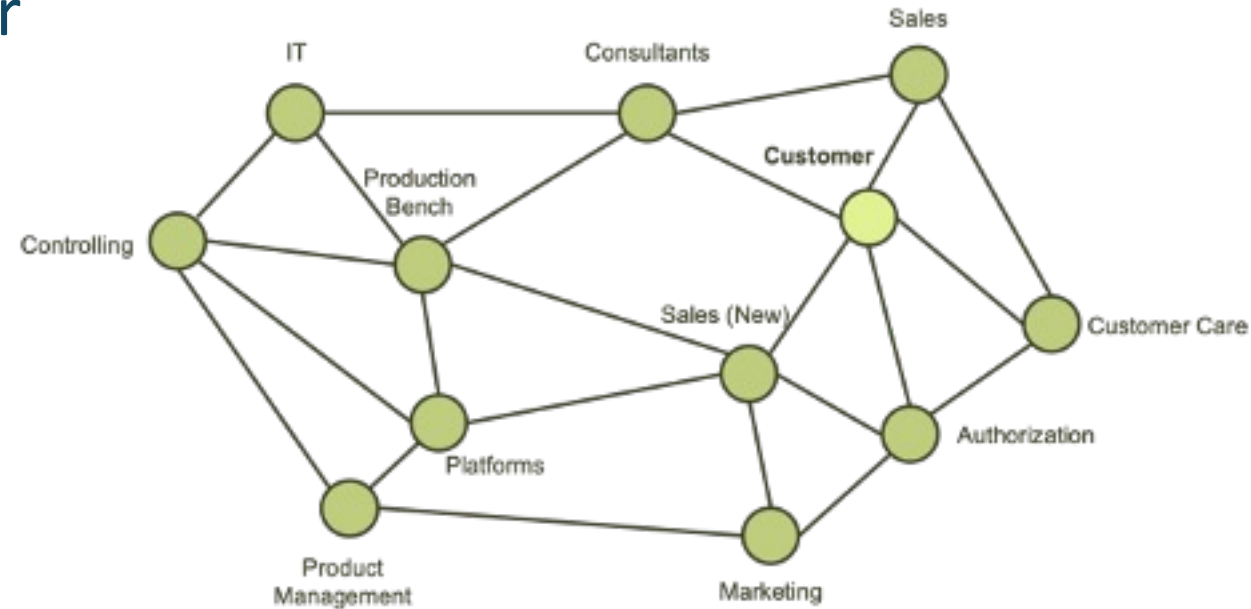
2019

2020



A Network of Interdependent Services

Organizations are a network of interdependent services with policies that determine their behavior



....but are there any common patterns?

Given these axioms, can we find any corollaries?

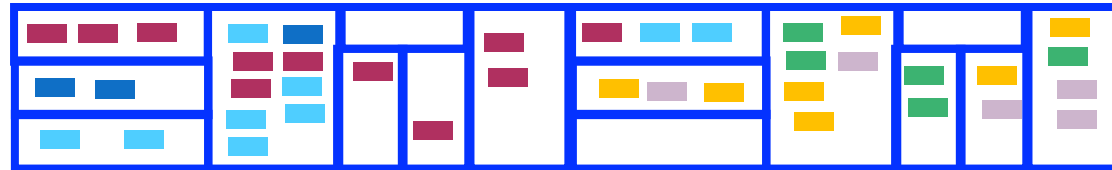
Can we derive theorems?

Does It All Fit Together? Yes Indeed



Strategy Development

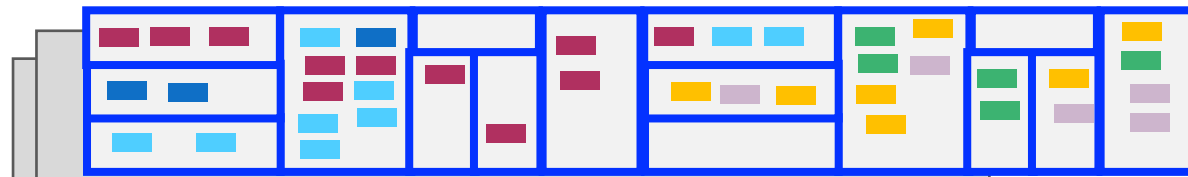
Portfolio Kanban: Flight Level Three



Upstream

Downstream

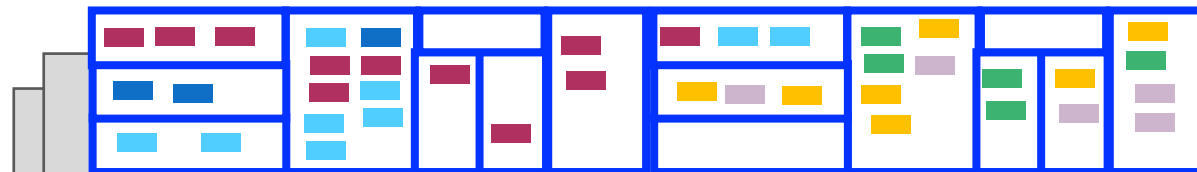
Value Stream Coordination: Flight Level Two



Upstream

Downstream

Teams: Flight Level One



Upstream

Downstream



Metrics & Forecasting

Agenda?

Kanban System Design in Co

10th agile NYC
Agile Day 2019

Now You See
Observing Flow Using

Craig Strong, CTO, Ariel

@arielpartners

Agile Alliance

Scrum The Home

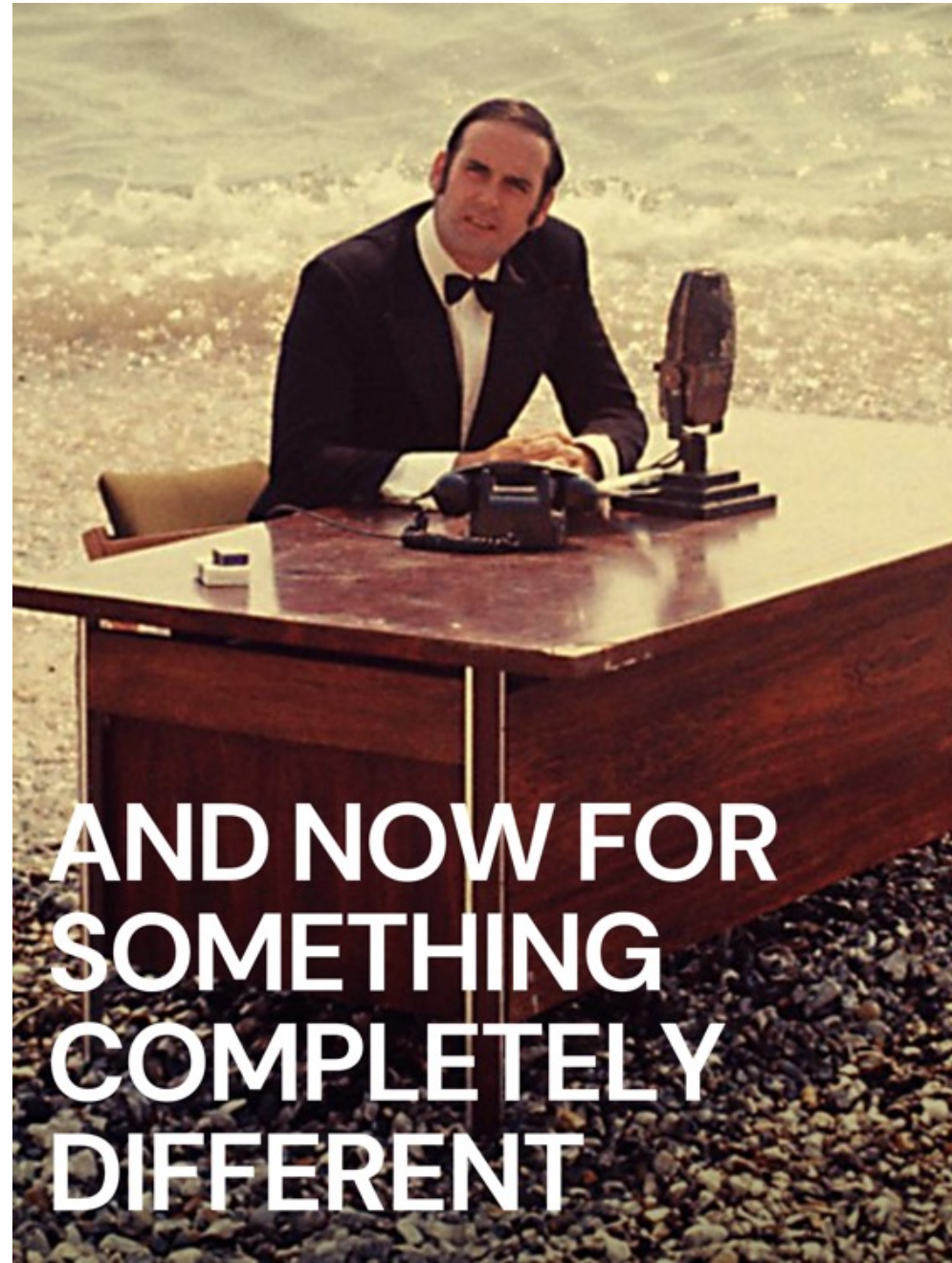
@AgileNYC

AgileNYC

Kanban Antipatterns: What You Don't Know Can Hurt You



Craig Strong
CTO, Ariel Partners
September 23, 2019
Washington, DC



**AND NOW FOR
SOMETHING
COMPLETELY
DIFFERENT**

Agenda: 4 hours

Demonstrations

1. KanbanZone
2. EasyKAD / Jira Cloud
3. SwiftKanban
4. Kanbanize
5. Jira Data Center

Design Workshops

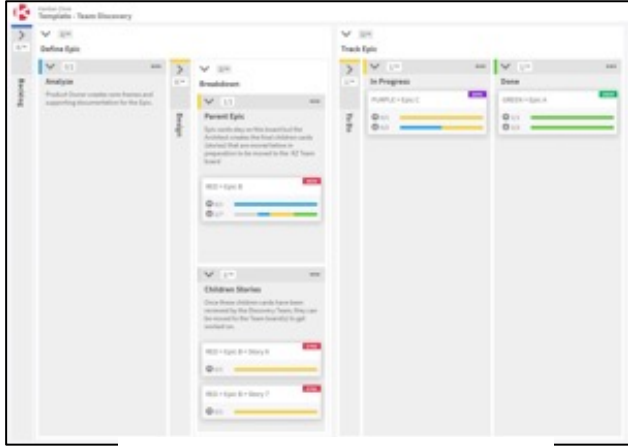
1. Multi-Level Team Board
2. Value Stream Board
3. Portfolio Board

Wrap Up

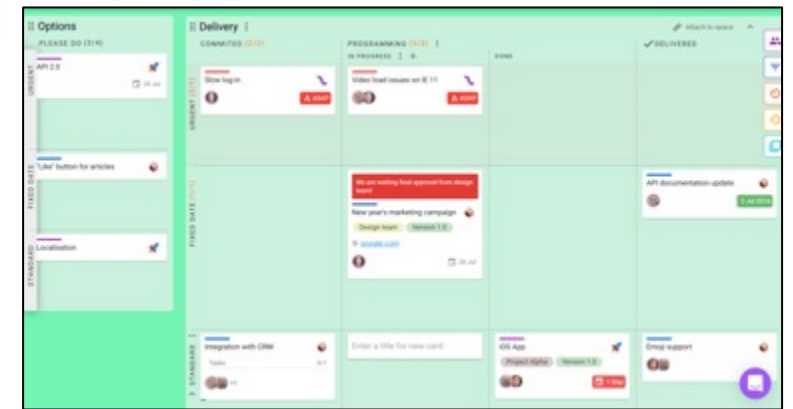
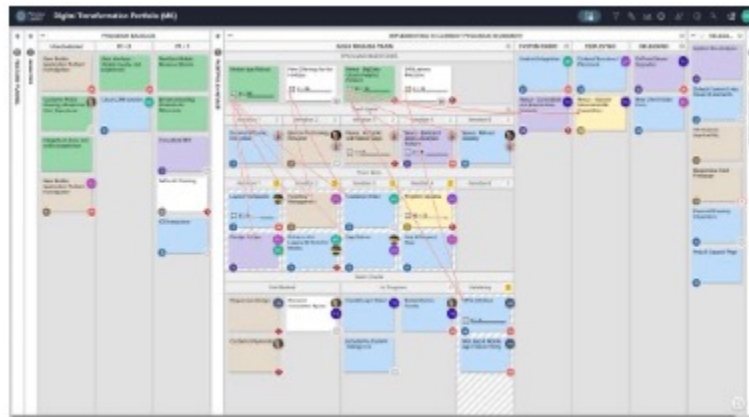
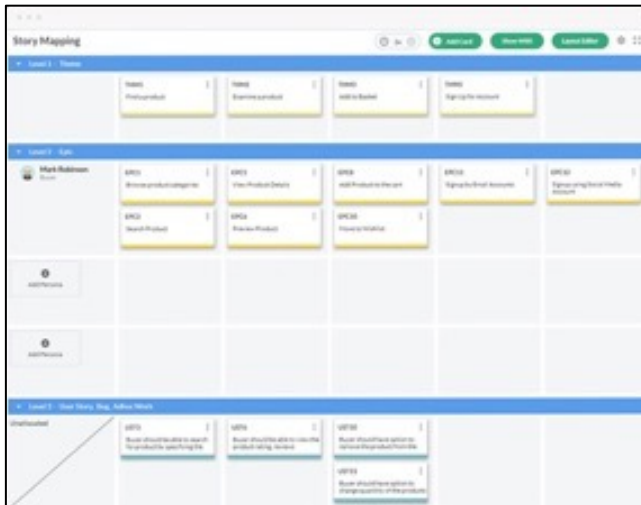
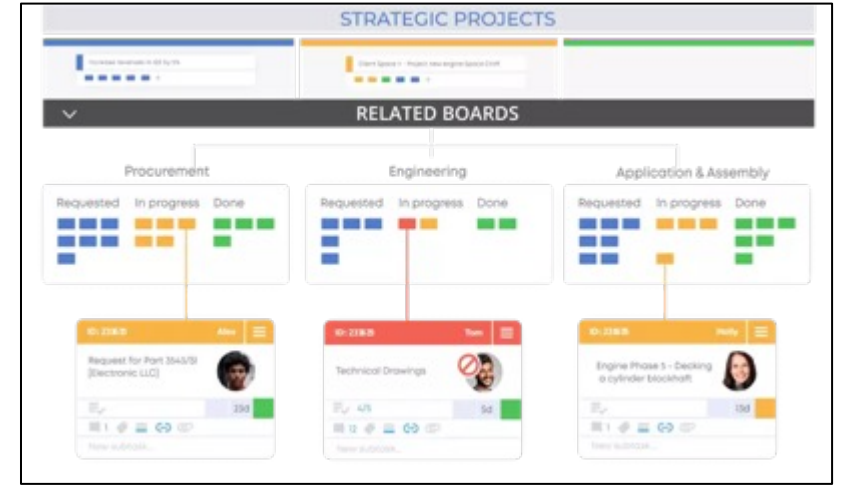
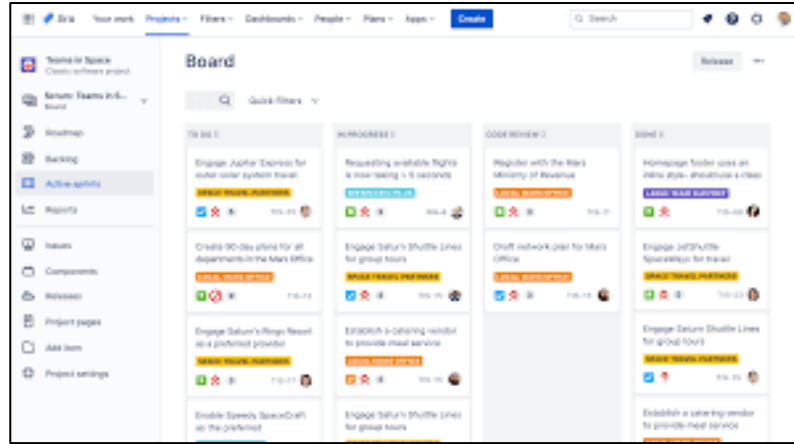
QnA



Demonstrations



Short-Listed Tools





1. KanbanZone

Spotify Example* Thanks to Cliff Hazell






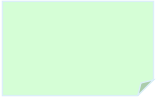
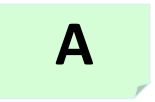


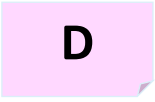

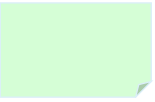

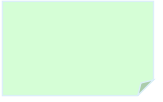









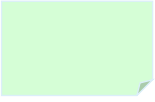

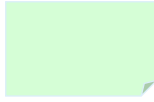
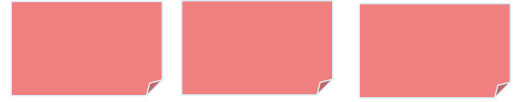
KanbanZone Version

The screenshot displays the KanbanZone interface for a project titled "Spotify Example". The main workspace is divided into several sections:

- Untriaged (3 items):** A list of tasks including "several unit tests broken after upgrade in javascript lib", "loop arbitrary number of tracks", and "shuffle tracks semi randomly".
- Triaged (5 items, Min 10):** A section for "Not yet committed work" containing an "Ideas" list with tasks like "onboard mary sue", "incorporate multiple playlists", "Show name on front page", and "auto repeat". Below it is a "Discarded" list with "Display Number of People who are listening to same track".
- In Progress (15 items):** A large section containing:
 - Blockers (1 item):** "Work blocking other teams".
 - Product and Operations (6 items, Max 20):** A Kanban board with columns: Next Up (2 items), Analyzing (2 items), Doing (1 item), and Reviewing (1 item). The "Doing" column contains a task "Improve Performance of Searching" with a collaborator "Deji Rotimi".
 - Recruitment (3 items, Max 8):** A Kanban board with columns: Next Up (0 items), Analyzing (1 item), Doing (1 item), and Reviewing (1 item). The "Doing" column contains "unable to add Joe to permissions list".
- Done (13 items):** A vertical list of completed tasks, including "Top 6 Bets" (e.g., "#1 Shuffle Songs On Demand") and "Systems We Own" (e.g., "Jupiter", "Athena").



HR Example* Thanks to Ian Carroll

To Do	Next (3)	Doing (4)				Done
Recruitment 	  					 
Onboarding / Offboarding 		IT (3)  	Facilities (3)   	Legal (2) 	Finance (3)  	  
Training & Career Development 						
Administering Benefits 						



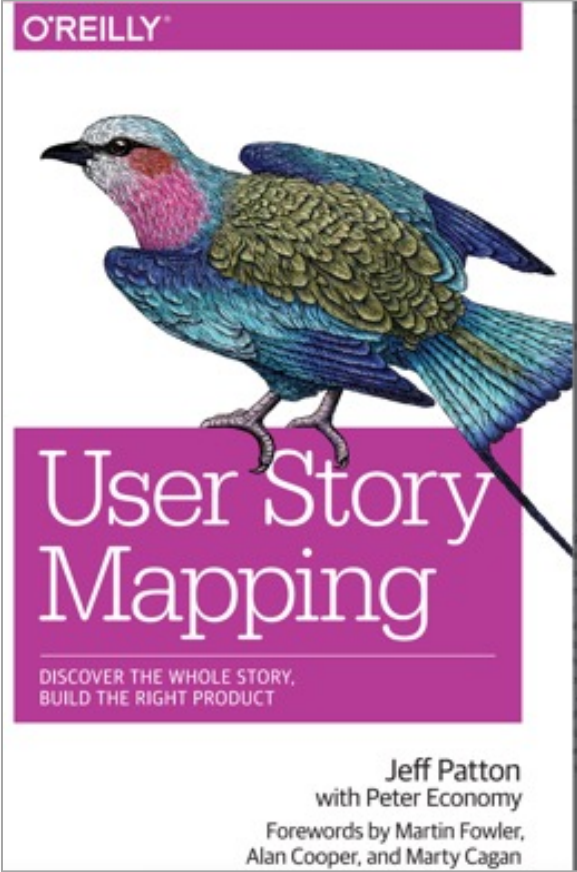
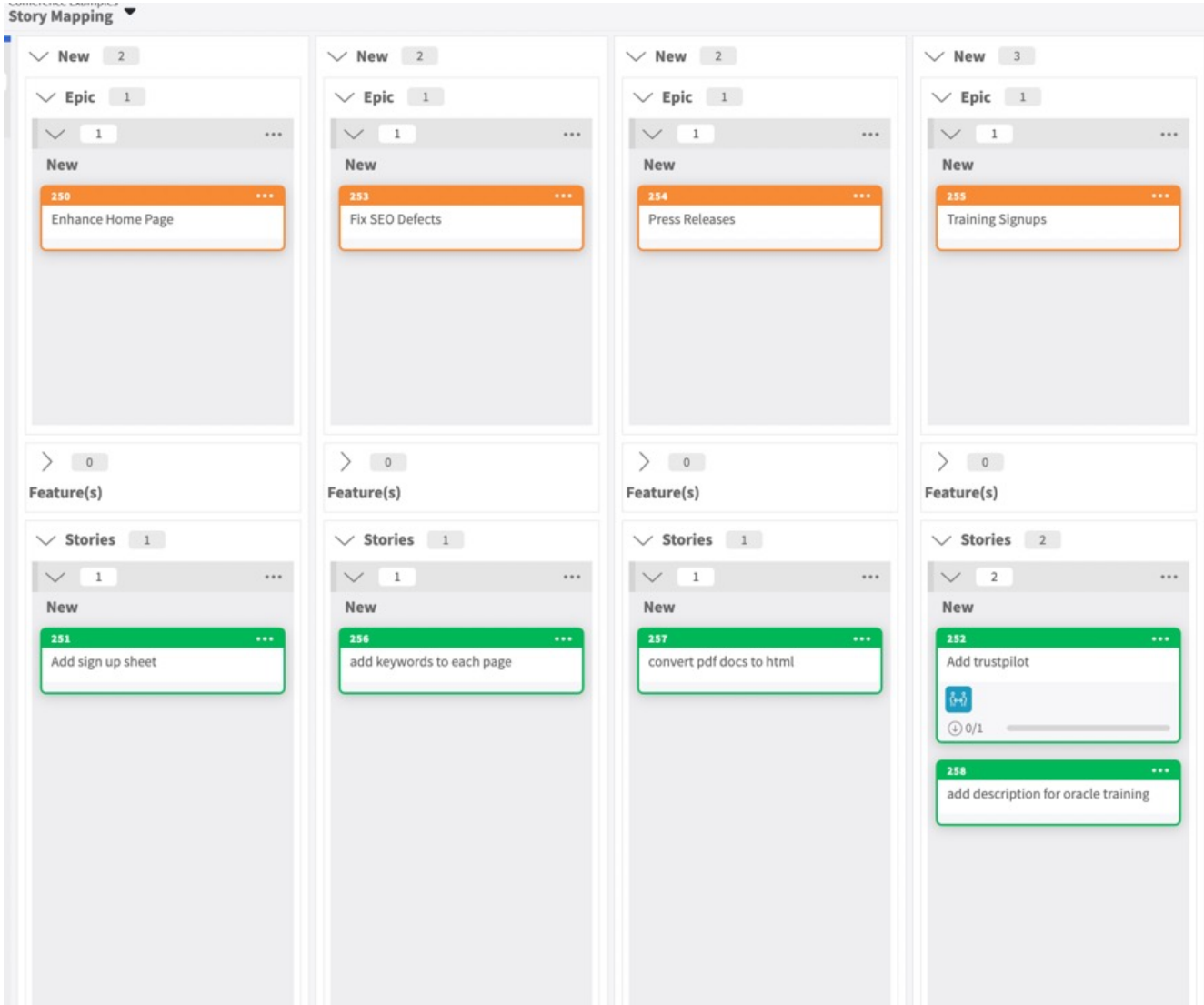
KanbanZone Version

The screenshot displays a Kanban board with the following structure:

- To Do (8 items):**
 - Recruitment (2 items): 230 prepare architect job spec, 243 check salary range with finance for new JD
 - Onboarding / Offboarding (1 item): 240 exit debrief for david
 - Training & Career Development (2 items): 235 update 2021 it training, 234 secure udemy subscription
 - Administering Benefits (3 items): 245 prepare brochure for IRA choices, 239 look for better 401K plan, 237 update PTO days for joe
- Next (4 items):** 241 discuss switching to PEO, 234 update training system, 232 recruit aws specialists, 248 onboard 5 new remote resources
- Doing (9 items):**
 - Doing (4 items): 238 On board suzie, 231 update job desc template, 230 advise Albert regarding 401K options, 236 prepare training for kanbanzone
 - Dependencies (3 items):
 - IT (1 item): 244 setup server for IT training
 - Legal (2 items): 246 review legal obligations re training, 238 Suzie sign legal waiver
- Completed Dependencies (2 items):**
 - IT-Done (1 item): 247 setup for albert
 - Facilities-Done (1 item): 248 prepare training room
- Done (1 item):** 242 legal review of new jd template



KanbanZone Example: StoryMap



KanbanZone Example: Lean Design Canvas

The screenshot displays a KanbanZone Business Canvas board with the following sections and items:

- Business Canvas** (25 items)
 - Key Partners** (2 items)
 - 262 Key Partner 1
 - 261 Key Partner 2
 - Activities & Resources** (4 items)
 - Key Activities** (2 items)
 - 281 Key Activity 1
 - 280 Key Activity 2
 - Key Resources** (2 items)
 - 271 Key Resource 1
 - 272 Key Resource 2
 - Value Propositions** (2 items)
 - 259 Value Proposition 1
 - 260 Value Proposition 2
 - Customers & Channels** (4 items)
 - Customer Relationships** (2 items)
 - 276 Customer Relationship 1
 - 275 Customer Relationship 2
 - Channels** (2 items)
 - 282 Channel 1
 - 283 Channel 2
 - Customer Segments** (3 items)
 - 270 Customer Segment 1
 - 269 Customer Segment 2
 - 268 Customer Segment 3

Kanban Zone Differentiators and Limitations

Differentiators

- Mirror Card
- None column
- Performance & Usability

Coming Soon

- Multi-Card width columns
- Stickers and Decorators
- Timeline view

Coming Later

- Metrics & Forecasting
- More than one Assignee
- Display Epic Name / Label in Card
- Swim Lane WIP for Capacity Allocation
- Per-Person WIP
- Calculated / Scripted Field





2. EasyKAD (Jira Cloud)

Jira Cloud Example

Projects / Ariel Website Improvements / AWI board

Kanban board

Release JS

Search this board Quick filters ▼

NEXT UP 13

- Improve google page speed score of ariel home page
Add/Improve SEO to our ...
AWI-343
- Landing page for our tech meetup on the Ariel website under "insights"
Add/Improve SEO to our ...
AWI-371
- Put a link and a blurb about our tech meetup on the Ariel website home page
Add/Improve SEO to our ...
AWI-366
- Add multi-page capes statement to our corporate capabilities page
Website cleanup, wordpr...
AWI-374
- add the PDF whitepapers as

CONTENT REVIEW 1

- URGENT: Jira Training page is BLANK. content got removed somehow
Website cleanup, wordpr...
AWI-368

IN DEVELOPMENT 7

- Fix the broken inbound and outbound links
Add/Improve SEO to our ...
AWI-342
- URGENT: FIX 404 Errors
AWI-403
- Put links to our YouTube videos on the Ariel website
Add/Improve SEO to our ...
AWI-354
- Post the Jira remote work article as a blog entry
Blogs and Articles
AWI-353
- Overall look and feel for training classes should consider other competitor
Improve Training pages
AWI-70

FOR REVIEW IN QA 1

- Improve covid language banners. title should toggle hide/show region
Website cleanup, wordpr...
AWI-344

FOR REVIEW IN PROD 5

- Issue with Eventbrite Events
AWI-404
- URGENT 404 BROKEN LINKS: Training -> Human Centered Design Training
Website cleanup, wordpr...
AWI-388
- Create a Past Courses page
AWI-392
- Issue with Blog Page
AWI-394
- Course page date link going to wrong place
AWI-405

DONE 5

- URGENT: HCD Training page is 404. Somehow it got removed please restore it
Website cleanup, wordpr...
AWI-369
- URGENT: about page link uses "localhost" and is therefore broken
Website cleanup, wordpr...
AWI-367
- Post the Jira Configuration for Maximum agility article as a blog entry
Blogs and Articles
AWI-294
- Improve POD for trainings based on Flight level trainings info
Improve Wordpress POD ...
AWI-335

Kanban Plugin for Jira Cloud: EasyKAD



Fastest Delivery Team

 **Kanban Management Professional**
Kanban University

 **EasyKAD Kanban Boards**
by KAD - Kanban Accelerated Delivery
for Jira Cloud
★★★★★ 5 ⬇️ 31 installs
SUPPORTED JIRA SOFTWARE

The screenshot shows a Kanban board with the following columns and card counts:

- 30 Cards (Total)
- READY TO DO: 7 Cards
- TRiage: 8 Cards
- REAdy: 7 Cards
- DESIGN: 8 Cards
- WORK IN PROGRESS: 28 Cards of Max 7
- DEVELOPMENT: 11 Cards
- WAITING QUEUE: 6 Cards
- IN PROGRESS: 5 Cards
- TESTING: 9 Cards
- WAITING QUEUE: 6 Cards
- IN PROGRESS: 3 Cards
- DONE: 17 Cards

The configuration menu for the 'WAITING QUEUE' column is open, showing:

- Column Name: WAITING QUEUE (13/22)
- Maximum: 0
- Column Type: Activity
- Actions: ARCHIVE COLUMN, COLOR COLUMN, MOVE COLUMN
- Internal Columns: 1, 2, 3, 4, 5, 6, 7



Jira Cloud + EasyKAD Example

The screenshot displays the 'AWI KAD Board 1' in EasyKAD. The board is organized into columns and lanes. The top navigation bar includes 'My Kanban Boards List', a search filter, and 'My Kanban Boards Filters'. The board title is 'EasyKAD™ Team Delivery Kanban Board' and 'AWI KAD Board 1'. The columns are: 'PLANNING' (383 Cards), 'READY TO DO' (1 Card), and 'WORK IN Progress' (9 Cards of Max 10). The 'WORK IN Progress' column is further divided into 'ANALYSIS' (1 Card), 'DEVELOPMENT' (4 Cards of Max 10), and 'REVIEW' (4 Cards). The 'DEVELOPMENT' column is further divided into 'IN PROGRESS' (1 Card), 'WAITING' (1 Card), and 'IN PROGRESS' (3 Cards). The 'REVIEW' column is further divided into 'WAITING' (1 Card) and 'IN PROGRESS' (3 Cards). The board is divided into three lanes: 'EXPEDITE', 'FIXED DELIVERY DATE', and 'STANDARD'. The 'PLANNING' column has four lanes: 'Planning - PAOONO LOT', 'Planning - POTENTIAL', 'Planning - SOON', and 'Planning - NEXT'. The 'READY TO DO' column has one lane: 'READY'. The 'ANALYSIS' column has one lane: 'ANALYSIS'. The 'DEVELOPMENT' column has three lanes: 'IN PROGRESS', 'WAITING', and 'IN PROGRESS'. The 'REVIEW' column has two lanes: 'WAITING' and 'IN PROGRESS'. The cards are as follows:

- PLANNING - PAOONO LOT:**
 - AWI-368: URGENT: Jira Training page is BLANK, content got removed somehow. Assignee: HOWIES. Priority: SR.
 - AWI-371: Landing page for our tech meetup on the Ariel website under "insights". Assignee: HOWIES. Priority: JN.
 - AWI-378: Fix the spacing on the front page between logo and menu. Assignee: HOWIES. Priority: D.
 - AWI-376: Add NYC DOITT SI Contract Vehicle Award to the list of. Assignee: HOWIES. Priority: JN.
- READY:**
 - READY: 1 Card.
- ANALYSIS:**
 - ANALYSIS: 1 Card.
- DEVELOPMENT - IN PROGRESS (1 Card):**
 - AWI-379: Change "Our Vendor Partnerships" to "Strategic Partners". Assignee: HOWIES. Priority: JN.
- DEVELOPMENT - WAITING (1 Card):**
 - AWI-348: Convert all existing press releases to the new POD, creating HTML versions of the PDFs. Assignee: HOWIES. Priority: JN.
- DEVELOPMENT - IN PROGRESS (3 Cards):**
 - AWI-369: URGENT: HCD Training page is 404. Somehow it got removed please restore it. Assignee: HOWIES. Priority: SR.
 - AWI-366: Put a link and a blurb about our tech meetup on the Ariel website home page. Assignee: HOWIES. Priority: JN.
- REVIEW - WAITING (1 Card):**
 - AWI-367: URGENT: about page link uses "localhost" and is therefore broken. Assignee: HOWIES. Priority: SR.
- REVIEW - IN PROGRESS (3 Cards):**
 - AWI-374: Add multi-page capes statement to our corporate capabilities page. Assignee: HOWIES. Priority: JN.



Jira Cloud EasyKAD Differentiators and Limitations

Differentiators

- Column Background Colors
- Swimlane Background Colors
- Multiple Assignees
- Colorized Cards
- Blocker Signals
- Multiple Projects on One Board
- Smart Lanes
- Dynamic “Quick Filters” on top

Limitations

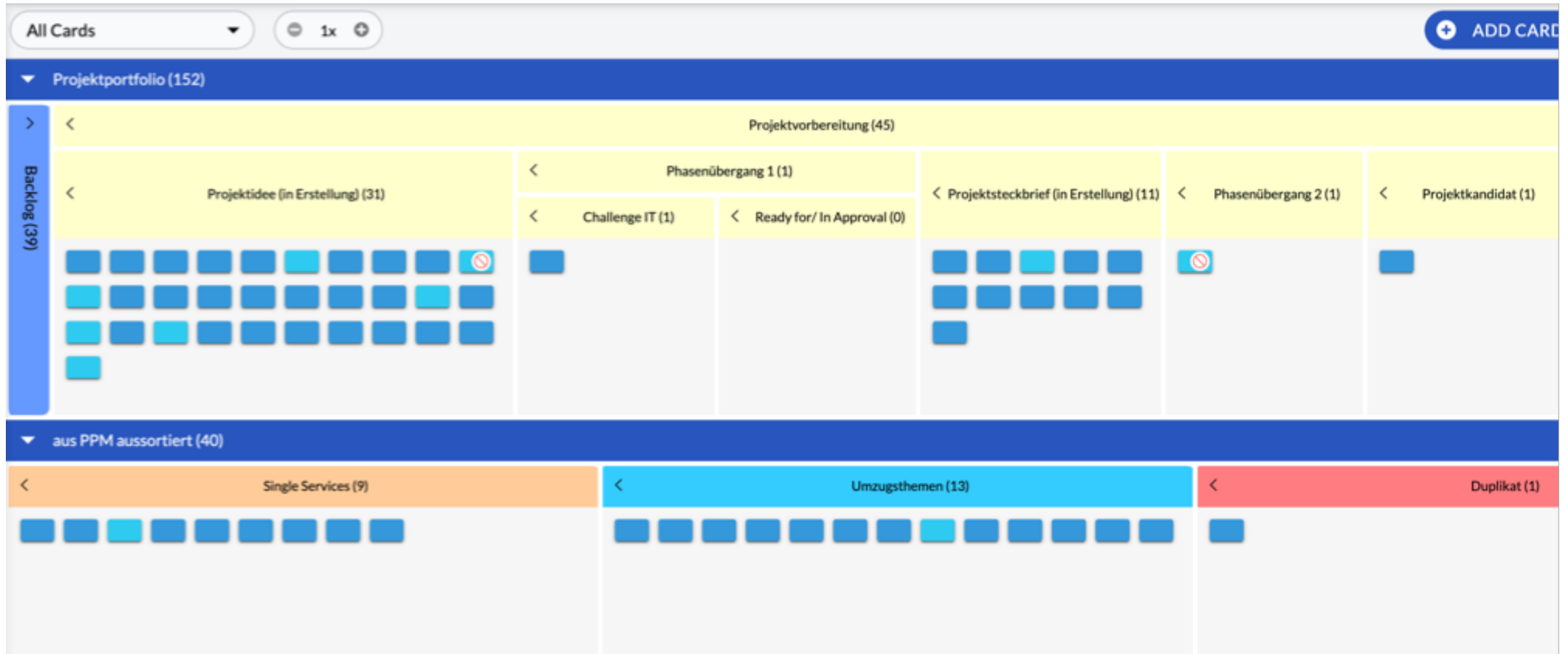
- Addl Fields In Cards (like Epic Name, Labels)
- Metrics & Forecasting
- Charts & Graphs
- Swim Lane WIP for Capacity Allocation
- Improved Filters
- Per-Person WIP





3. SwiftKanban

Swift Kanban Example



SwiftKanban Differentiators and Limitations

Differentiators

- Can be Installed On-Prem
- Multiple Assignees (only one visible)
- Column/SwimLane Background Colors
- Colorized Cards
- Stickers and Labels
- Zoom to Chiclet View
- Smart Lanes
- Blocker Clustering
- Metrics & Forecasting
- Charts & Graphs
- Risk Spider Charts
- AI recommenders
- Board Playback

Limitations

- No calculated/scripted fields
- No Quick filters
- Administration is Somewhat Complex





4. Kanbanize

Kanbanize Use Case: Online Education Company

Learning Recovery Plan
Grade 3

Grade 3 Learning Recovery Plan Overview

Directions: This is a 10-minute, self-paced lesson for Grade 3 students who need to review multiplication and division of whole numbers within 100. They also get their first exposure to fractions on numbers. For many children across the country, this is one of the most challenging areas in their mathematics. So, to study the concepts of fractions, we've created a video with mathematical, if necessary, of fractions in 2nd grade numbers, if a complete struggle in mastery of fractions. Mastery of fractions is one of the highest-achieving factors in getting into college.

LEARNING OBJECTIVES (20 minutes per lesson)

- Lesson 1A, Lesson 1B, Lesson 1C
- Lesson 2A, Lesson 2B
- Lesson 3A, Lesson 3B, Lesson 3C

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On Saturday, 32,736 more movie tickets were sold than on Sunday. On Sunday, only 17,295 tickets were sold. How many people bought movie tickets over the weekend?

Sum $\boxed{17,295}$

Sat $\boxed{17,295}$ $\boxed{32,736}$

67,326 people bought tickets

Handwritten calculations:

$$\begin{array}{r} 17,295 \\ + 32,736 \\ \hline 50,031 \end{array}$$

$$\begin{array}{r} 50,031 \\ + 17,295 \\ \hline 67,326 \end{array}$$

$$\begin{array}{r} 17,000 \\ + 33,000 \\ \hline 50,000 \end{array}$$

$$\begin{array}{r} 33,000 \\ + 33,000 \\ \hline 66,000 \end{array}$$

Use the hanger diagram to solve for the value of w .

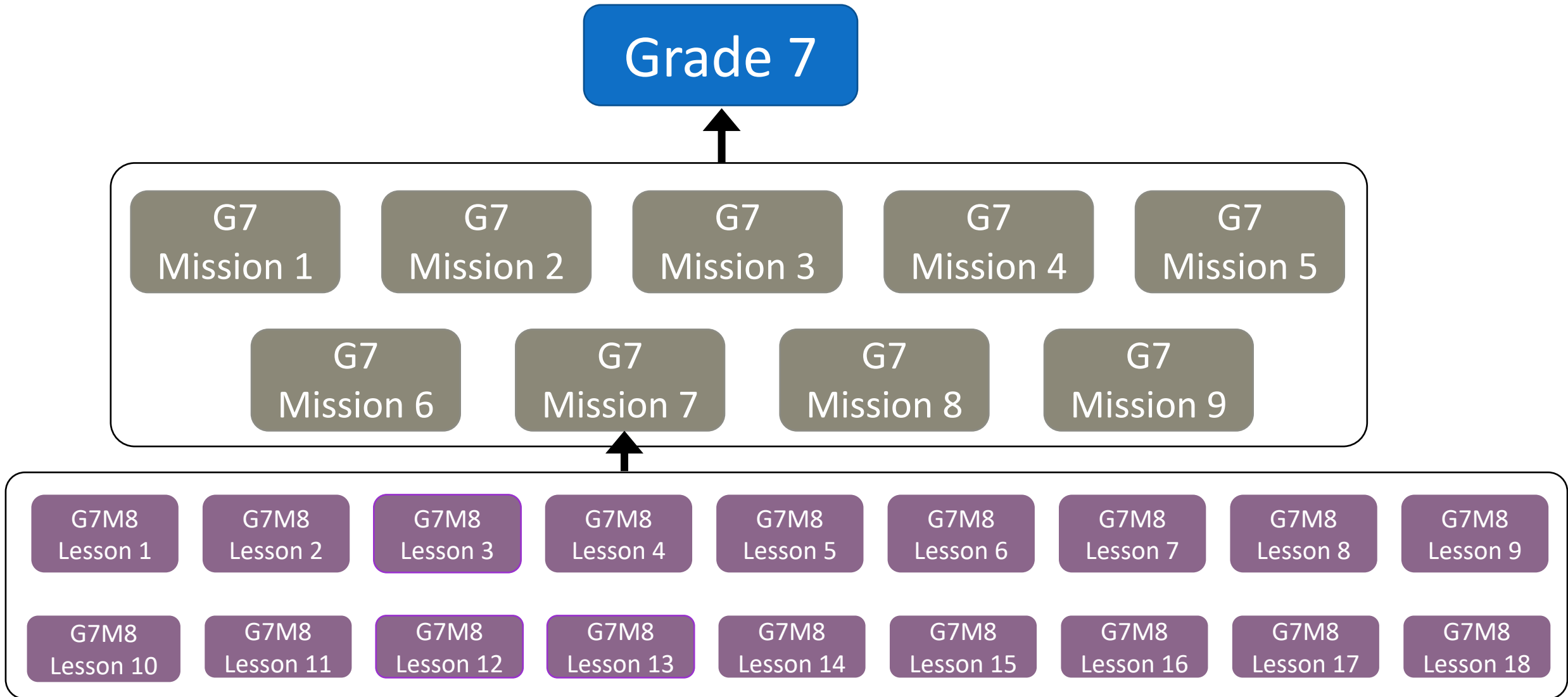
Write an equation to represent the hanger diagram.

Task Group 1 #123512

Enter ✓

- Mission: Help K-8 Students to love and excel at Math
- Primary school lessons in production Now
- Users nearly 1/3 of all US Students
- Extending into Elementary and Secondary School Grades
- Delivery: Roughly one grade-worth of material per calendar year

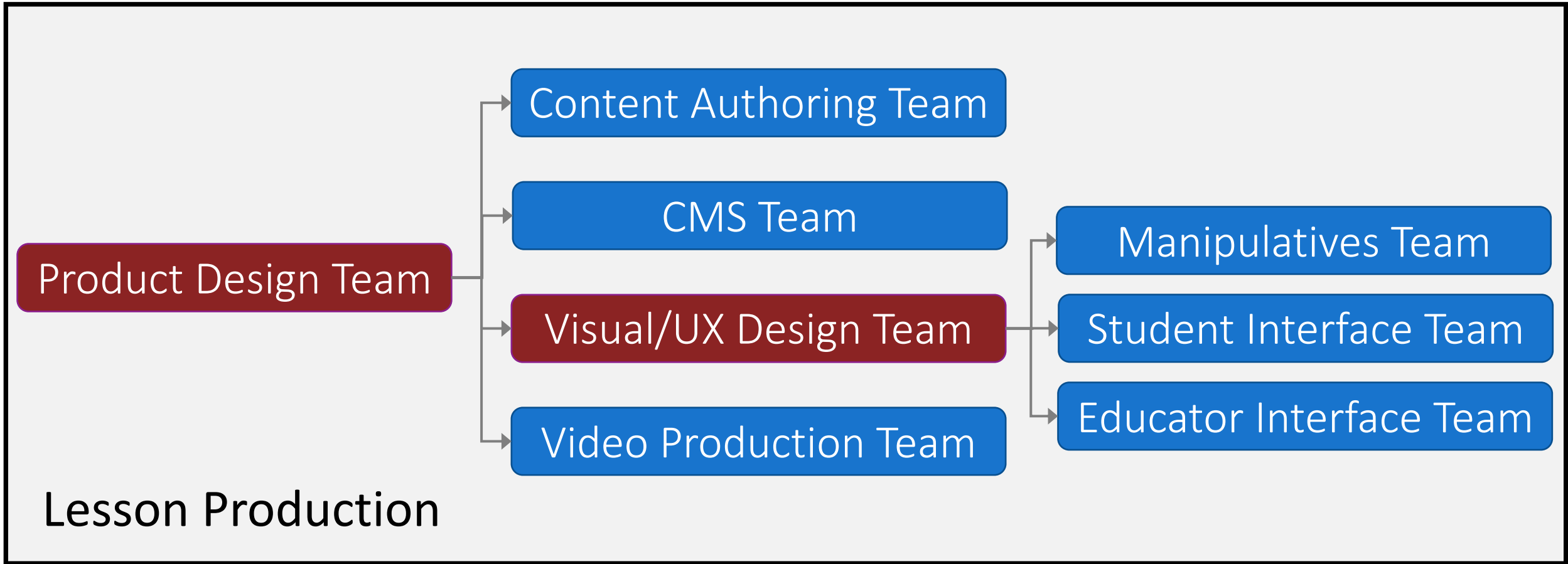
Anatomy of Curriculum Work Items



Summary of Challenges

- Regular weekly deployments to Production every Thursday
- Constant improvements throughout, especially for scalability
- Many dependencies for lessons: rescheduling is difficult
 - Scheduled video production date
 - Voice actors
 - Teachers
 - Script
 - Unique Interface features (e.g., mystery bag manipulative)
- New material cannot go “live” until entire grade is finished
- Interface is brand new— significant rework is expected
- Each grade is more difficult and time consuming than the last

Visualize Board Relationships On Dashboard

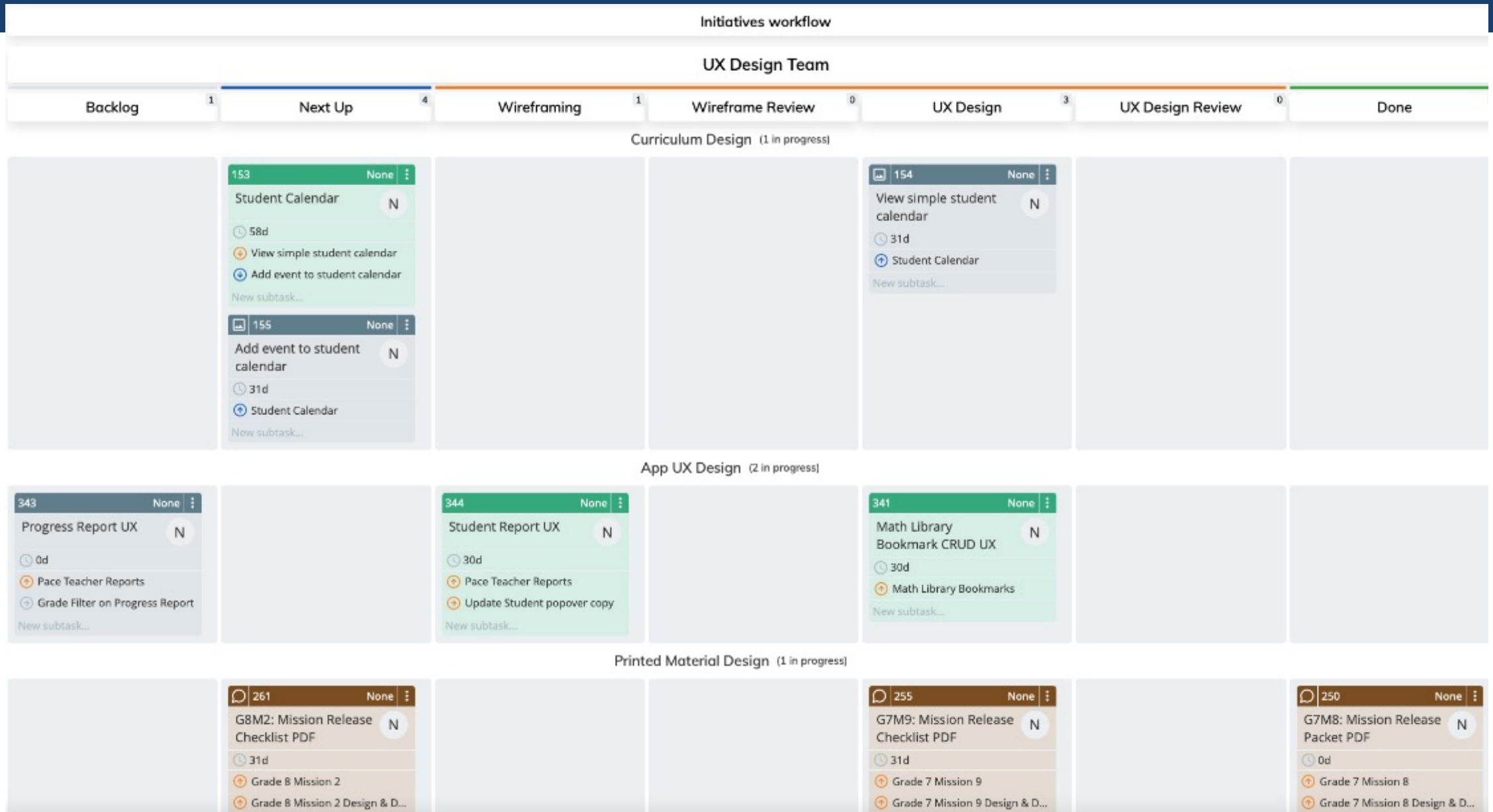


LEGEND:

Upstream Team
(Discovery Kanban)

Downstream Team
(Delivery Kanban)

Discovery Kanban Board: UX Design Team



Generating a related card UX card \leftrightarrow User story

The image displays a Jira interface with two main boards and a side panel. The top board, 'Initiatives workflow', has columns for 'Tested' (0), 'In Progress' (2), and 'Done' (0). It contains two cards: 'Math Library Bookmarks' (0% complete, 340 points) and 'Pace Teacher Reports' (0% complete, 345 points). The bottom board, 'UX Design Team', has columns for 'Next Up' (1), 'Wireframing' (4), 'Wireframe Review' (1), and 'UX Design' (3). It features a 'Curriculum Design' section with 1 card in progress. Two cards are visible: 'Add event to student calendar' (ID 155, 31d) and 'View simple student calendar' (ID 154, 31d). The right panel, 'Related Boards', lists four boards: 'CMS Team / CMS Team Stories', 'Manipulatives Team / Manipulatives Team Stories', 'Educator Interface Team / Educator Interface Stories', and 'Student Interface Team / Student Interface Stories'. An orange callout box explains that this panel shows all cards linked to any card on the 'Visual Design Team' board and provides instructions on how to filter and create linked cards.

Initiatives workflow

Tested 0 | In Progress 2 | Done 0

0% 340
Math Library Bookmarks
+ 30d

0% 345
Pace Teacher Reports
+ 30d

(0) Ready to archive

UX Design Team

1 | Next Up 4 | Wireframing 1 | Wireframe Review 0 | UX Design 3

Curriculum Design (1 in progress)

155 None
Add event to student calendar
31d
Student Calendar
New subtask...

153 None
Student Calendar
58d
View simple student calendar
Add event to student calendar
New subtask...

154 None
View simple student calendar
31d
Student Calendar
New subtask...

Related Boards

- CMS Team / CMS Team Stories
- Manipulatives Team / Manipulatives Team Stories
- Educator Interface Team / Educator Interface Stories
- Student Interface Team / Student Interface Stories

This panel shows all cards that are linked to any card on the "Visual Design Team" Board. Select a card (ctrl+click) on the "Visual Design Team" board to apply a filter. Drag & drop a card from the "Visual Design Team" board onto a related board to create a new linked card.

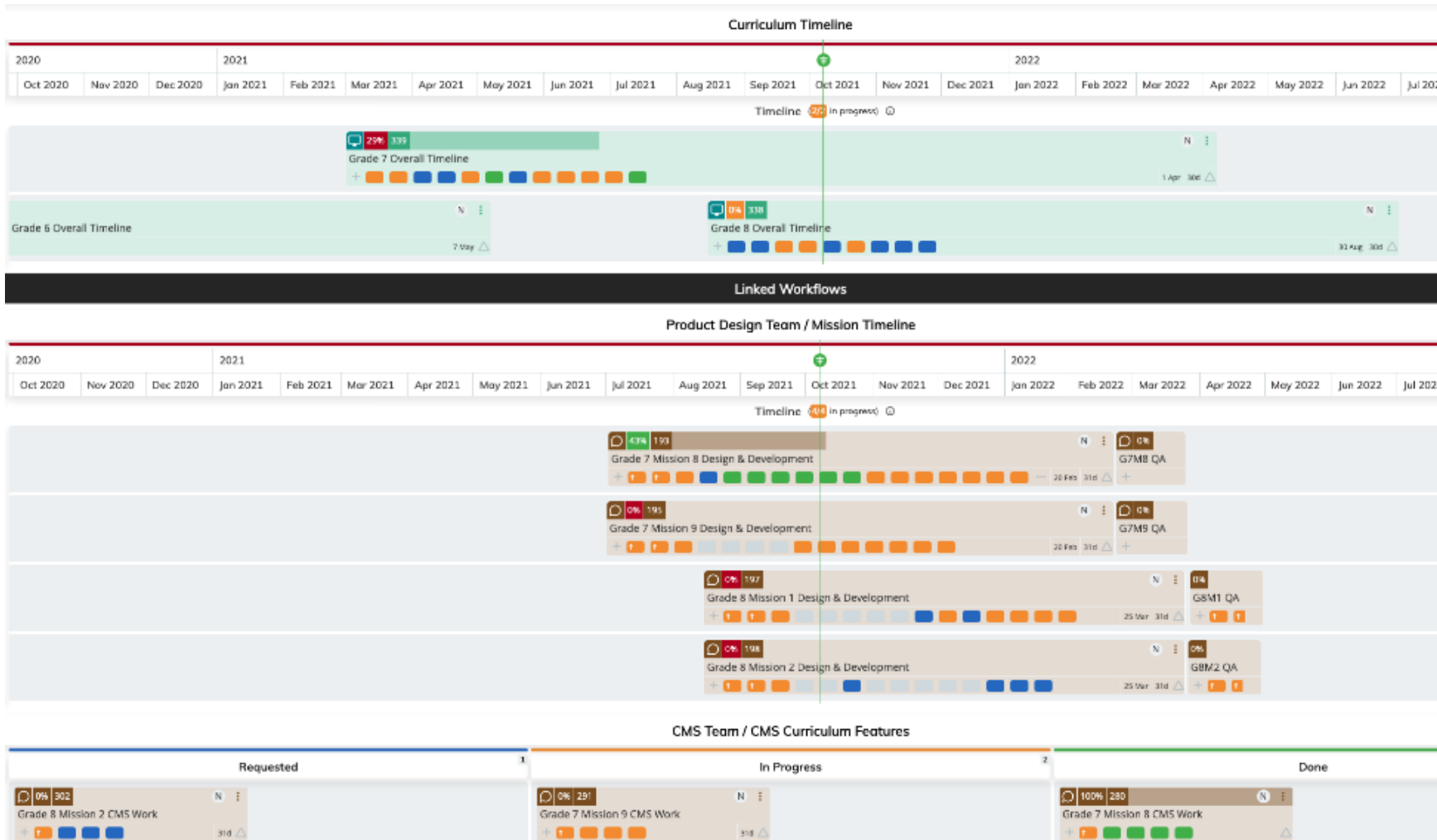
Educator Interface: Delivery Kanban Board

The image displays a Kanban board for the 'Educator Interface' project, organized into three main sections: 'Educator Curriculum Features', 'Educator App Features', and 'Educator Interface Stories'.

- Educator Curriculum Features:** This section has three columns: 'Requested' (0 items), 'In Progress' (1 item), and 'Done' (0 items). The 'In Progress' column contains a card for 'G7M9 Educator Features' (ID 347) with a 0% completion status and a 30-day deadline.
- Educator App Features:** This section also has three columns: 'Requested' (1 item), 'In Progress' (1 item), and 'Done' (0 items). The 'Requested' column contains a card for 'Badges' (ID 350) with a 0% completion status and a 30-day deadline. The 'In Progress' column contains a card for 'Assignments Page' (ID 352) with a 0% completion status and a 30-day deadline.
- Educator Interface Stories:** This section has a multi-column workflow: 'Backlog' (5 items), 'Next Up' (0 items), 'Specifying' (1 item), 'Ready for Dev' (1 item), 'Development' (2 items), 'Ready for Review' (0 items), 'Reviewing' (0 items), 'Reviewed' (1 item), and 'Accepted' (0 items). Below these columns, there are two swimlanes: 'Expedited (0 in progress)' and 'Default (4 in progress)'. The 'Default' swimlane contains several cards:
 - Card 351: 'tooltip on math library assignments page header' (30d deadline).
 - Card 346: 'Update Student popover copy' (30d deadline).
 - Card 393: 'Add class button sometimes missing + icon' (30d deadline).
 - Card 158: 'Roster search timeout for multi-school admins' (30d deadline, urgent).
 - Card 159: 'School account badge' (30d deadline).



Flight Level 2: Coordination Boards



- ❑ Timeline view shows bar by planned start & end dates
- ❑ Grades up top
- ❑ Missions Below
- ❑ All child features and user stories are displayed
- ❑ Progress bar
- ❑ Run MCS to check if we are on track to complete by the due date

Kanbanize Differentiators and Limitations

Differentiators

- Column/Lane Background Colors
- Colorized Cards
- Stickers and Labels
- Blocker Clustering
- Metrics & Forecasting
- Charts & Graphs
- Timelines
- Convenient Aggregation Boards
- Convenient Drag and Drop UI

Limitations

- Single Assignee Only
- No calculated/scripted fields
- No Min WIP





5. Jira Data Center

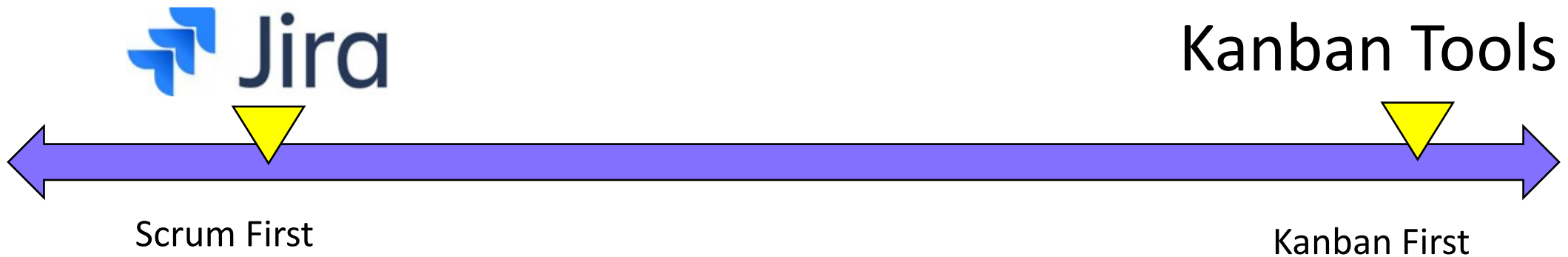
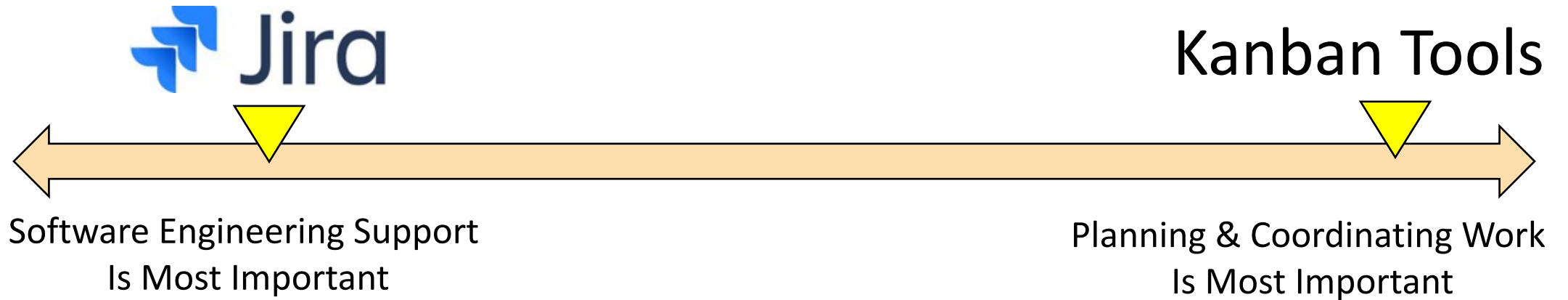
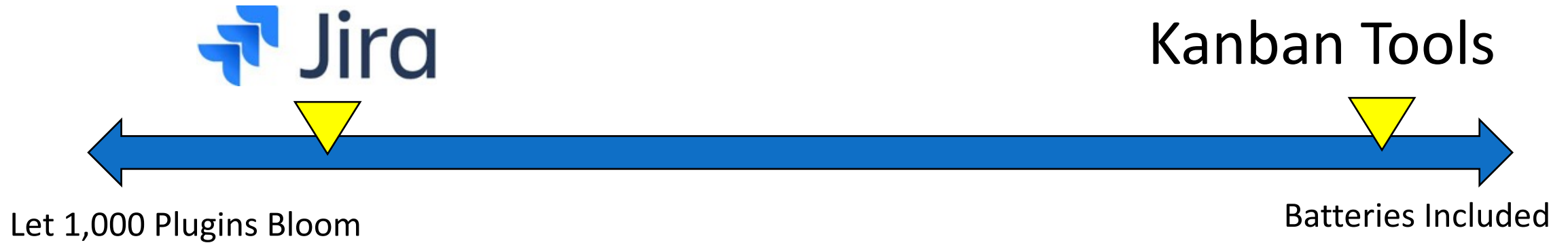
Stuck with Jira Data Center?

Here is what we did

- Scour the Jira Plugin Marketplace
- You will need ~10 Plugins
- ...It will be Expensive
- Master Jira Administration
- ...It will be time Consuming



Different Philosophies



Leveraging scripted fields and quick filters

ABSS board

4 days remaining

Complete sprint

Board

ABSS Sprint 6

Job postings and advanced trainer support

QUICK FILTERS: Urgent Blocker Blocked Bottleneck Person Highest Aging Carried Over Recently Moved Not Recently Moved Recently Updated Overdue Stale Slow Added after sprint start ... Show more

TO DO 2

MAX 20

READY 3

MAX 20

IN PROGRESS 4

MAX 7

IN REVIEW 2

MAX 5

RESOLVED 2

MAX 6

CLOSED 10

MAX 20

ABSS-144
Develop CBT Training Course for ABSS

Documentation

No Blockers
None
DoD: EMPTY

8

ABSS-102
Trainers should have additional details in their profiles

User Profiles

ABSS-85 - Resolved, ABSS-57 - Clo...

None
DoD: 1/7

8

ABSS-104
list my upcoming classes in my profile with links for more info

User Profiles

No Blockers
Max Taylor
DoD: 3/5

2

ABSS-84
Administrator can set fee for posting other courses or events

Courses and Events

No Blockers
Cassie Owens
DoD: 5/5

8

ABSS-105
view profiles of other members on the site

User Profiles

No Blockers
Taman Suherman, William Smith
DoD: 5/5

3

ABSS-77
Notify via email of job postings about to expire

Employment Opportunities

No Blockers
Taman Suherman, William Smith
DoD: 5/5

1

ABSS-145
Upgrade SQL Server to latest version

Technology Spikes

No Blockers
None
DoD: 0/6

3

ABSS-143
When copying a course not all information is copied

Courses and Events

No Blockers
Kevin Campbell
DoD: 0/2

1

ABSS-90
Convert course to event or vice versa

Courses and Events

No Blockers
William Smith
DoD: 1/5

1

ABSS-66
Full-Text Search in FAQs

FAQs

No Blockers
Kevin Campbell, Nia Coleman
DoD: 5/5

8

ABSS-85
Trainer can update existing courses or events

Courses and Events

No Blockers
Cassie Owens, Max Taylor
DoD: 5/5

2

ABSS-74
Manage content for job postings at any time

Employment Opportunities

No Blockers
Max Taylor
DoD: 5/5

8

ABSS-142
Unable to update existing courses

Courses and Events

No Blockers
Max Taylor
DoD: 0/4

2

ABSS-59
Provide Limited Member Only Content to Public as Incentive to Become Member

Articles

No Blockers
Taman Suherman, William Smith
DoD: 2/5

5



ABSS-87
Trainer can copy an existing course or event to create a new one

Courses and Events

No Blockers
Taman Suherman, William Smith
DoD: 5/5

3

Cool New Plugin: Portfolio Forecaster



Get reliable, risk-aware forecasts for your epics or versions by in three easy steps! Choose what to forecast, the historical data to use in the forecast, and how confident you need to be in your forecast. [Learn more](#)

[Epics](#) [Versions](#) Guide me

EPICS SELECTION ⓘ
9 epics found.
[Change](#)

HISTORICAL DATA ⓘ
85 issues found.
[Change](#)

FORECAST PARAMETERS
Concurrent Items: 2 ▾ Confidence: 95% ▾
Show not started Advanced ▾ [Save](#) [Reset](#)

Epics	Due date ⓘ	Due date likelihood ⓘ	Items remaining ⓘ	Forecasted date ⓘ
⌵ User Profiles IN PROGRESS	Aug 25, 2022	0%	6	Sep 20, 2022
⌵ News IN PROGRESS	Aug 25, 2022	0%	5	Sep 18, 2022
⌵ Courses and Events IN PROGRESS	Aug 25, 2022	0%	9	Oct 10, 2022
⌵ Frequently Asked Questions IN PROGRESS	Aug 25, 2022	0%	1	Sep 23, 2022
⌵ Resources IN PROGRESS	Aug 25, 2022	0%	1	Sep 26, 2022
⌵ Employment Opportunities IN PROGRESS	Aug 25, 2022	0%	4	Oct 8, 2022
⌵ Articles IN PROGRESS	Aug 25, 2022	0%	3	Oct 11, 2022
⌵ Documentation end-user and per SDLC requirements IN PROGRESS	Aug 25, 2022	0%	2	Oct 12, 2022

Jira Data Center Differentiators and Limitations

Differentiators

- Show Cards on Multiple Boards
- Calculated Fields
- Quick Filters
- Good Forecasting Plugin
- Good StoryMapping Plugin
- Good Scripting Plugin
- Good Charting Plugin

Limitations

- No Multi-card Width Columns
- Can't drag-and-drop between swim lanes
- Only One Assignee
- No Stickers
- No Blocker Clustering
- No Swim Lane WIP for Capacity Allocation
- No Per-Person WIP
- Clumsy & Painful Workflow Configuration

Next?

Next Steps: What I would like to See

1. Order Points & Capacity Reservation

- WIP limits spanning multiple boards
- Overlapping WIP limits
- Multi-Team Reservation of Capacity

2. Flight Levels Support

- System Architecture: Interactive Top-level visualization across multiple boards
- Big Picture Visualizations

3. Strategy Boards

- OKRs, KPIs

4. Program and Portfolio Management

- Budgeting, calculation of financial metrics
- Staffing/resource planning

Workshops

1. Multi-Level Team Board

A software development team wants to create a Kanban board to help visualize their workflow. The team receives requirements from the business in the form of Features.

Historically, Feature lead times (from starting to analyze to deploying to production) are between 2 weeks and 6 months, with some outliers of more than one year.

The business wants Features to be completed faster and with more predictability.

The team wants to break down Features into smaller chunks of one week of work or less (Stories). The team indicates they can develop and test each Story separately.

The business has no problem with the way the team chooses to break down work internally but they want Features to be tested and deployed as a whole.

Here is the Feature workflow:

- 1) Backlog
- 2) Development
- 3) Integration Testing
- 4) UAT
- 5) Cutover
- 6) Done

How could you visualize Features and Stories in a single board?

How could the board help us with what we are trying to optimize?

What Kanban practices can we leverage?

Multi-Level Team Board Example

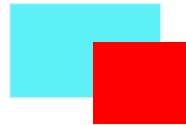
Backlog	In Progress	Specify	Ready	Implement		Test	Done	Int Testing	UAT	Done
				Doing	Done					
Maintenance										

2. Multi-Team Board

*With Thanks to Patrick Steyaert, Arlette Vercammen, and Klaus Leopold!

An IT Department has three teams: Team Red, Team Blue, and Team Green. The three teams mostly work independently, however, sometimes they have dependencies on each other.

Each team already has their own Team-Level board, and they are happy with their boards. If any item on a Team-level board can't move forward due to a dependency on another team, it gets blocked



They are seeing lots of these!

The teams would like to figure out a way to coordinate their dependencies, so they don't get blocked so often.

As their coach, you have recommended that they design a "coordination board:" a higher-level board that shows what each team is doing and enables a team to request work from another team.

Ideally, one team should be able to **reserve capacity in advance** so that their dependency is ready when they need it.

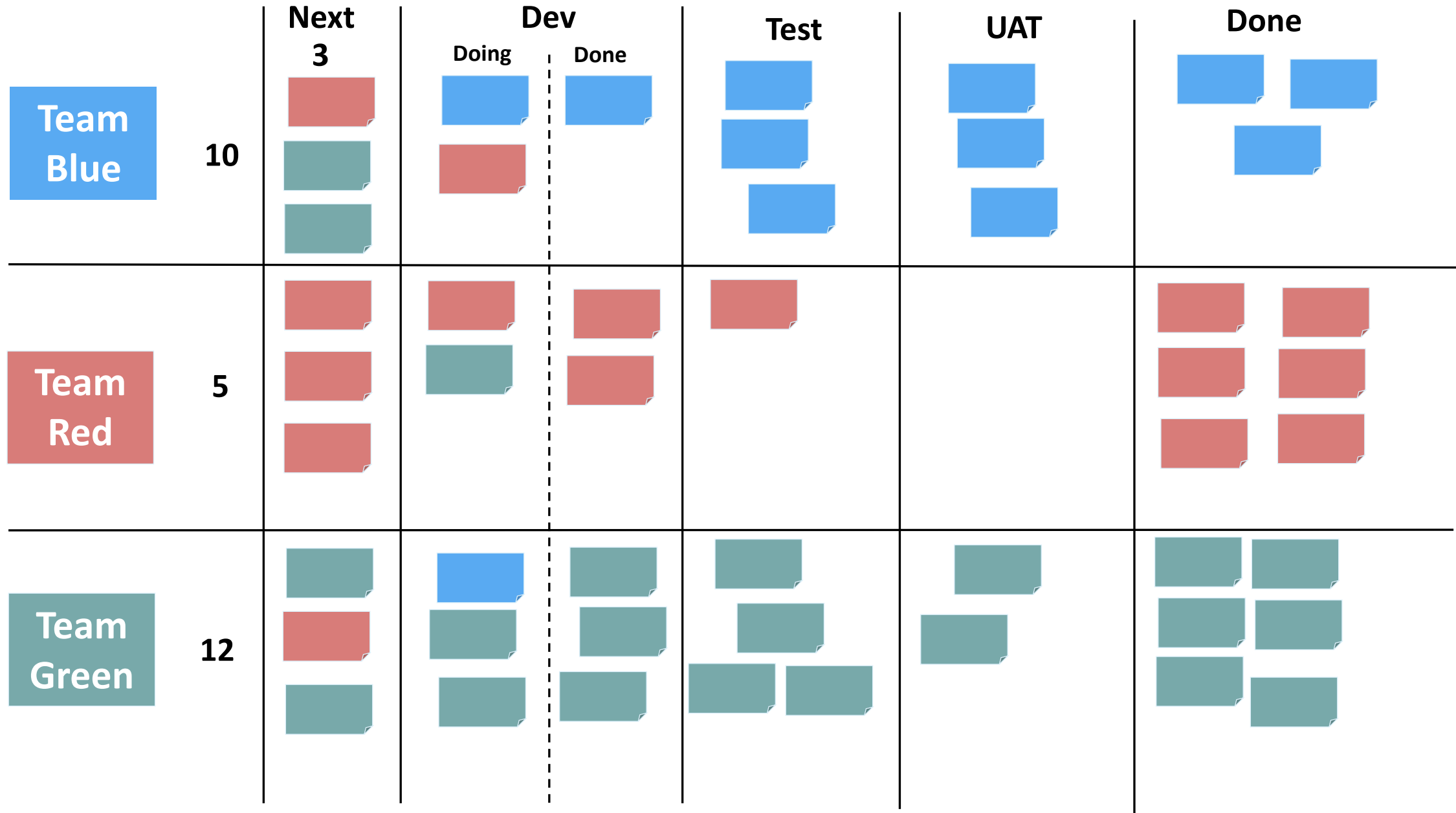
At this higher level, we only need this simplified workflow:

- 1) Dev
- 2) Test
- 3) UAT
- 4) Done

How could you visualize all three teams' work in progress in a single board?

How can one team reserve capacity in advance from another team?

Multi-Team Board Example



3. Portfolio Board

*With Thanks to Pawel Brodzinski and Guillaume Marceau!

You are working with a CIO of an organization who needs to manage a portfolio of 6 projects across 4 teams.

- The Teams are “Team A” through “Team D.”
- The Projects are “Alpha” through “Theta”

Projects are either Strategic or Tactical.

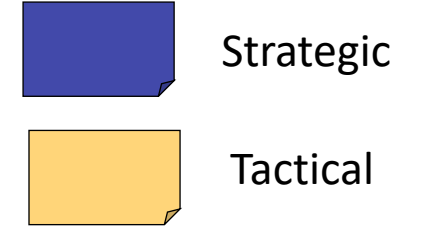
A Team can work on:

- three small projects,
- one large project, or
- one medium + one small project at a time.

	Project Alpha	Project Beta	Project Gamma	Project Delta	Project Epsilon	Project Zeta	Project Eta	Project Theta
Tactical or Strategic	Strategic	Tactical	Tactical	Tactical	Strategic	Strategic	Tactical	Tactical
S / M / L	Small	Medium	Small	Medium	Large	Medium	Small	Small
Team	Team A	Team A	Team B	Team B	Team C	Team D	Team D	Team D
Start	Q1	Q1	Q2	Q1	Q1	½ way thru Q1	Q1	Q1
Projected Finish	Q4+	½ way thru Q2	Q4+	Q3	Q4	Q4	Q1	Q2

How might you go about helping the CIO visualize his portfolio over the next 4 quarters?

Portfolio Board Example







	Q1	Q2	Q3	Q4
Team A	<div style="background-color: #334d99; color: white; padding: 5px; margin-bottom: 5px;">Alpha</div> <div style="background-color: #fcd926; padding: 5px;">Beta</div>	<div style="background-color: #334d99; color: white; padding: 5px; margin-bottom: 5px;">Alpha</div> <div style="background-color: #fcd926; padding: 5px;">Beta</div>	<div style="background-color: #334d99; color: white; padding: 5px;">Alpha</div>	<div style="background-color: #334d99; color: white; padding: 5px;">Alpha</div>
Team B	<div style="background-color: #fcd926; padding: 5px;">Delta</div>	<div style="background-color: #fcd926; padding: 5px; margin-bottom: 5px;">Gamma</div> <div style="background-color: #fcd926; padding: 5px;">Delta</div>	<div style="background-color: #fcd926; padding: 5px; margin-bottom: 5px;">Gamma</div> <div style="background-color: #fcd926; padding: 5px;">Delta</div>	<div style="background-color: #fcd926; padding: 5px;">Gamma</div>
Team C	<div style="background-color: #334d99; color: white; padding: 10px;">Epsilon</div>	<div style="background-color: #334d99; color: white; padding: 10px;">Epsilon</div>	<div style="background-color: #334d99; color: white; padding: 10px;">Epsilon</div>	<div style="background-color: #334d99; color: white; padding: 10px;">Epsilon</div>
Team D	<div style="background-color: #334d99; color: white; padding: 5px; margin-bottom: 5px;">Zeta</div> <div style="background-color: #fcd926; padding: 5px; margin-bottom: 5px;">Eta</div> <div style="background-color: #fcd926; padding: 5px;">Theta</div>	<div style="background-color: #334d99; color: white; padding: 10px; margin-bottom: 5px;">Zeta</div> <div style="background-color: #fcd926; padding: 5px;">Theta</div>	<div style="background-color: #334d99; color: white; padding: 10px;">Zeta</div>	<div style="background-color: #334d99; color: white; padding: 10px;">Zeta</div>

Strategy for Disability Case Processing System: US Govt

Strategy / Objective	KR / KPI	Business Function	Capabilities		
			3-6 Months	0-3 Months	Active
MVP: Support Initial Disability Claims for 1 medium MicroPact state	Initial Adult disability claim can be entered	Manage User Profile	User Financial Info	Manage User Relationships	Basic User Info
		Manage Organization	Assign Org Roles	Manage Org Users	Basic Org Info
		Manage Authentication	Impersonate User	User Logout	User Login
		Manage Disability Case			
		Manage Disability Claim			
		Manage Authorizations			
		Interface to State Financial Systems			
	Financial API Supports Quarterly Close				

Portfolio Board Example: Pharma company

MISSION	INVESTMENTS	PRODUCTS NAME PATIENTS	TEAM	PO					UP NEXT	ACTIVE SAGAS
					> 12 MONTH	9-12 MONTH	6-9 MONTH	3-6 MONTH		
[Empty Box]	[Red] [Red] [Red] [Red]	[Empty Box] [Form]	[3 People]	[1 Person]	[Green] [Green]				[Green]	SAGA [Green] [White] [White]
		[Empty Box] [Form]	[3 People]	[1 Person]	[Green]	[Green] [Green] [Green]	[Green] [Green]	[Green] [Green] [Green]	[Green]	[Green] [White] [White]
		[Empty Box] [Form]	[3 People]	[1 Person]	[Green]	[Green]	[Green]	[Green] [Green]	[Green]	[Green] [White] [White]
[Empty Box]	[Red] [Red]	[Empty Box] [Form]	[3 People]	[1 Person]	[Green]	[Green]			[Red]	[Green] [White]
		[Empty Box] [Form]	[3 People]	[1 Person]	[Green]	[Green] [Green]	[Green]	[Green]		[Red] [White] [White]
		[Empty Box] [Form]	[3 People]	[1 Person]	[Green]					[Red] [White]
[Empty Box]	[Red] [Red]	[Empty Box] [Form]	[3 People]	[1 Person]	[Green] [Green]					[Red] [White] [White]
		[Empty Box] [Form]	[3 People]	[1 Person]	[Green]					[Red] [White]
		[Empty Box] [Form]	[3 People]	[1 Person]						
[Empty Box]	[Red] [Red] [Red] [Red]	[Empty Box] [Form]	[3 People]	[1 Person]	[Green]					[Red] [White]
	[Red]									

Portfolio Board Example: “Green Energy” company, NYC

	Q1	Q2	Q3	Q4	
Alpha					Tactical
Beta					
Gamma					
Delta					
Epsilon					
zeta					
Eta					
Theta					



Parting Thoughts

Kanban Tools Can Now Support Rich, Real-World Workflows

- Cost of Change Is Low
- Multiple good options
- Different and Unique
- If you use Jira, plugins are available
- So... Don't be afraid to use them!

Constantly Tune and Improve Your Visualizations

- Make sure your board speaks to you
- If you encounter a bad situation and the board didn't telegraph it, time to review the board design
- Don't be afraid to try something! Revert later if it doesn't work
- Use swim lanes, colors, and card design
- Use higher-level boards for coordination, alignment, communication



Now You See It!

Observing Flow Using Kanban Boards

Craig Strong, CTO, Ariel Partners

THANK YOU

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 <https://linkedin.com/in/cstrong>

 [@arielpartners](https://twitter.com/arielpartners)

 <https://youtube.com/arielpartners>

 <https://arielpartners.com>