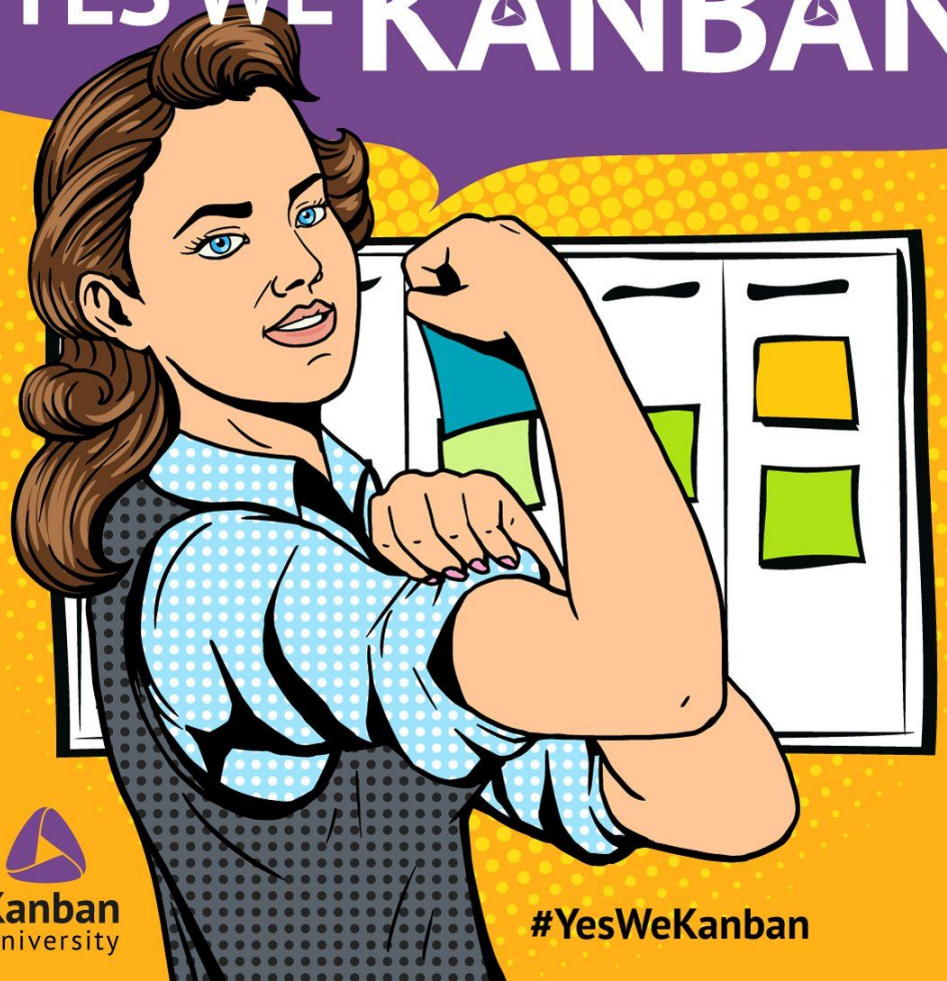


YES WE KANBAN



Getting it Done

An Introduction to using Kanban
OH-IUG 2021

Outline

About CLC and our previous work “system”

Why we selected Kanban

How to get started with Kanban

CLC’s Kanban boards and the software we use

Effects of using of Kanban at CLC

Resources on where to learn more

About the CLC

Consortium of 17 public libraries in Central Ohio

70+ Service Points (branches, pick-up lockers, etc.)

26 million annual physical circ (pre-pandemic)

1+ million registered patrons

1,500+ Library Staff Members

In addition to ILS service & support, we manage Office 365, Wide Area Network and a variety of database and other service contracts

CLC Staff
5 Full Time
employees



Our pre-Kanban workflow

HelpDesk ticketing system for member support

Yearly action plan with detailed initiatives each quarter

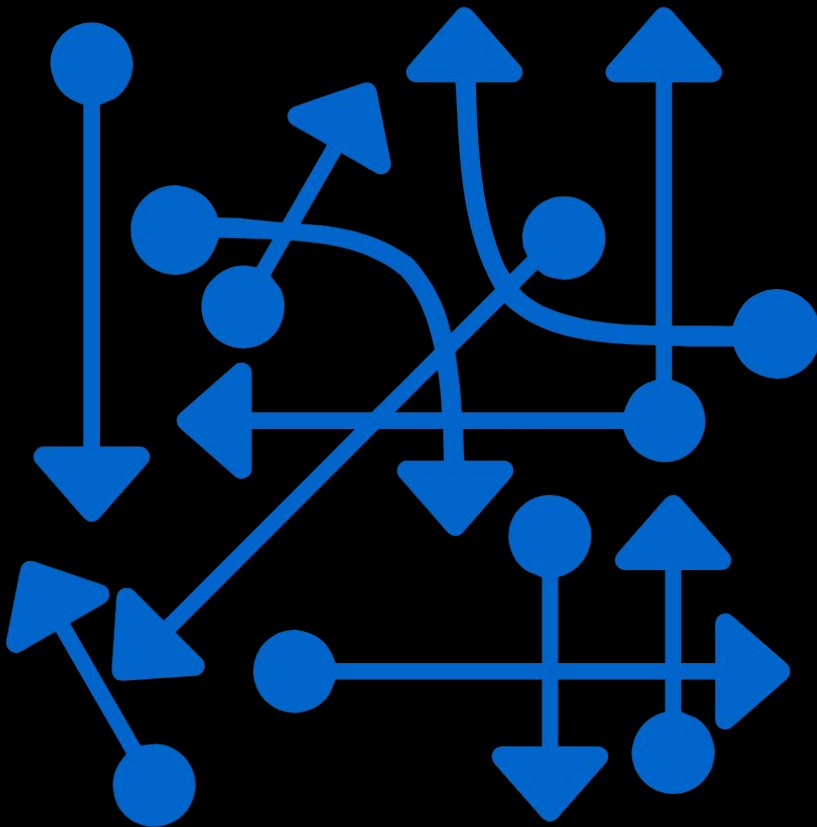
Items got worked on in an unstructured fashion

**Externally:
Everything
seemed
neat and
orderly**





Internally:
Things felt
chaotic



Internal Stressors

Uncertain what to focus on next

- Too much traffic management by Executive Director

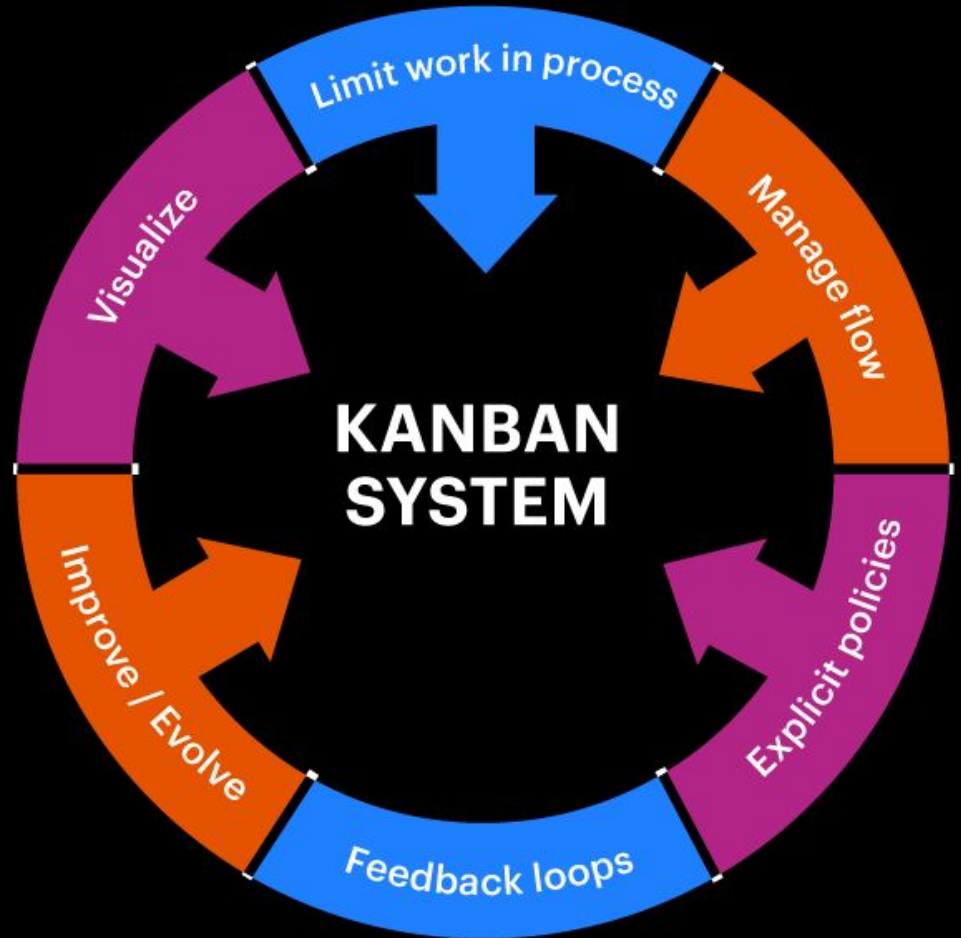
Low levels of team and stakeholder collaboration

Too much starting, not enough finishing

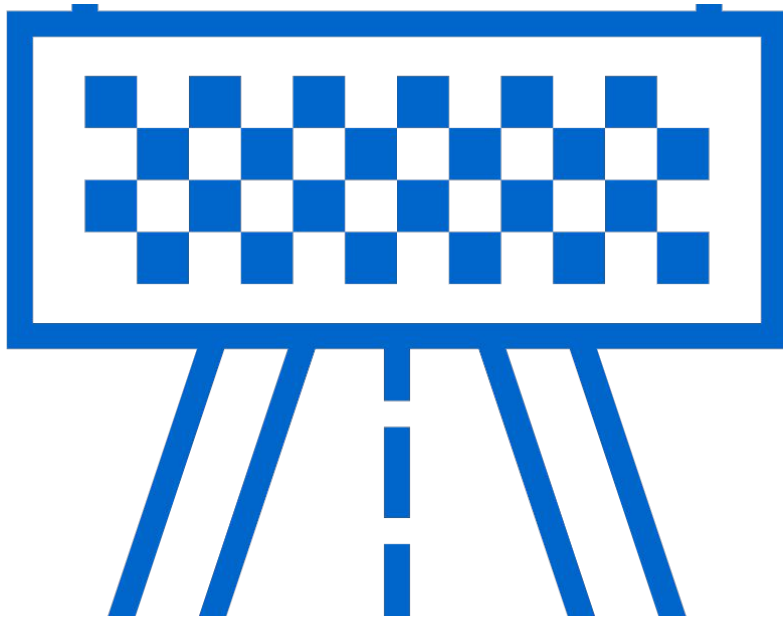
- Two year backlog of “committed” work

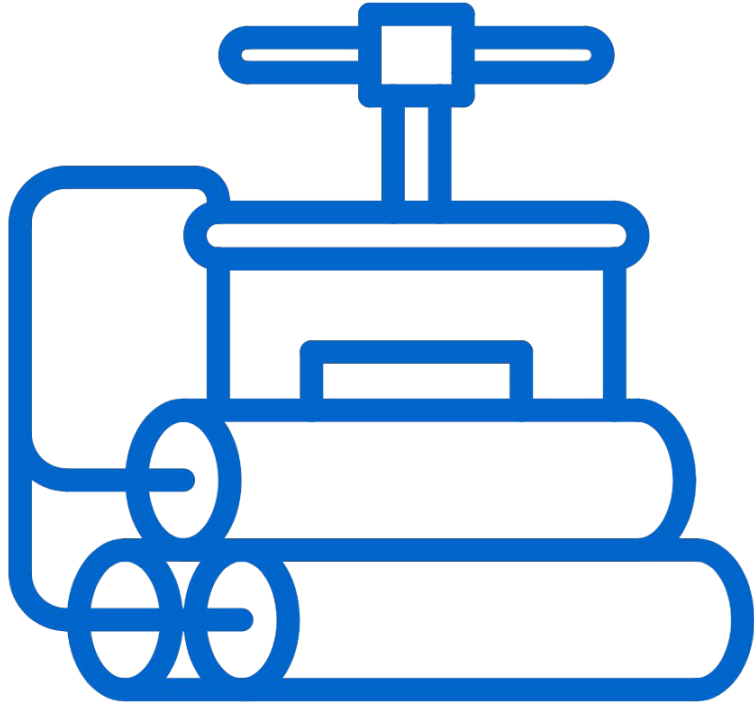
Unclear policies on how to do the work

Why Kanban?



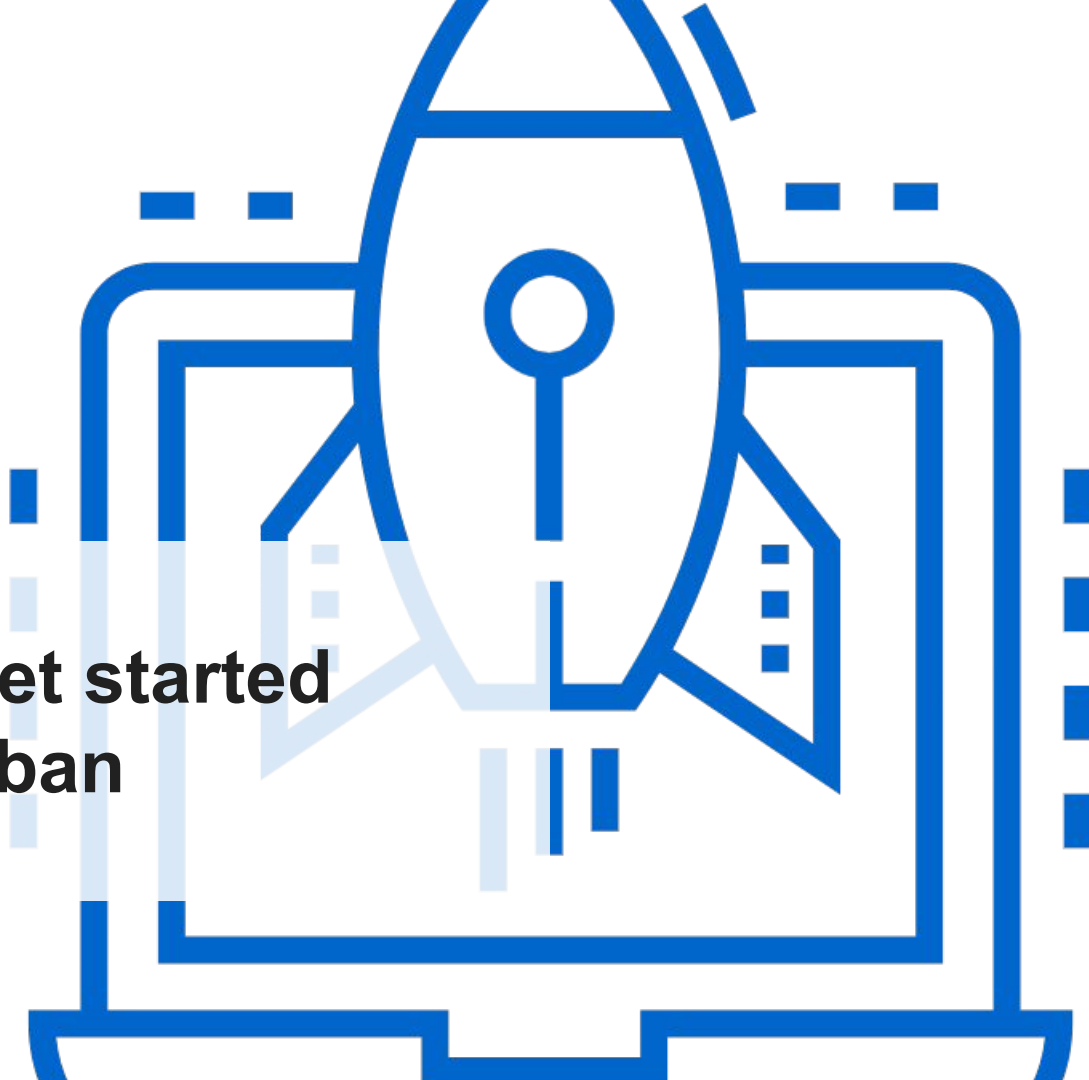
Kanban Starts with what you already have

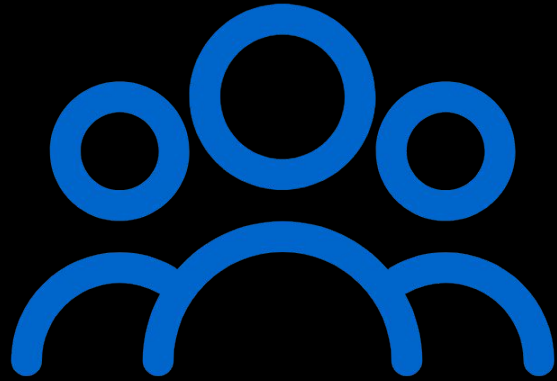




Kanban favors
evolving current
practices instead of
blowing them up.

How to get started with Kanban





Kanban works
best at the
individual or team
level



**Focus first on common
repeatable work types**

Contrasting examples

- **Good:** Building a Kanban for your purchase requisition process
- **Suboptimal:** Building a Kanban for your yearly budgeting process

- **Good:** Building a Kanban for your quarterly event programming process
- **Suboptimal:** Building a Kanban for your yearly staff in-service day

- **Good:** Building a Kanban for your user support/HelpDesk process
- **Suboptimal:** Building a Kanban for your ILS system upgrades that you perform once a year (you do want a checklist for this though!)

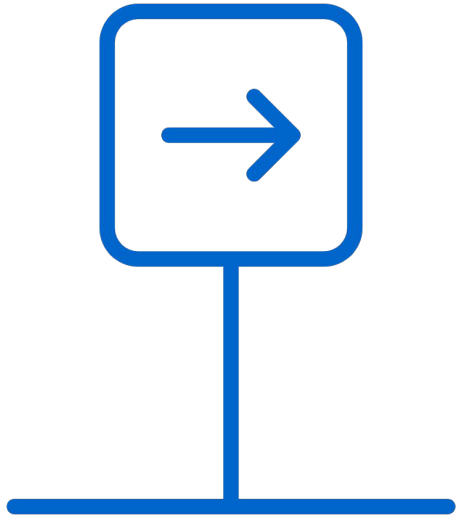
**Trace the “happy path”
for your process**



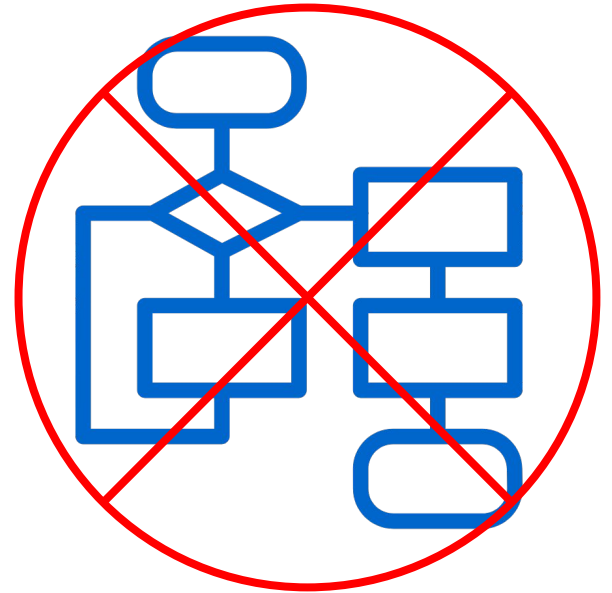
Building the happy path

1. Look at all related current work items (emails, tickets, project boards, etc.)
2. Put a few word summary of each work item on a physical or virtual post-it
3. Describe the current workflow stage for each item
 - a. Are you getting more information to determine what to do next?
 - b. Have you been actively working on this item (drafting email, working on presentation, etc.)
4. What happened just BEFORE the current stage?
5. If everything goes right, what happens AFTER the current stage?
6. Create columns for each workflow stage you discover
7. Continue this process for all work items
8. Group the post-it notes together under the columns/stages you discovered

Build a one-way path



Not a flowchart





What if an item isn't taking the happy path?

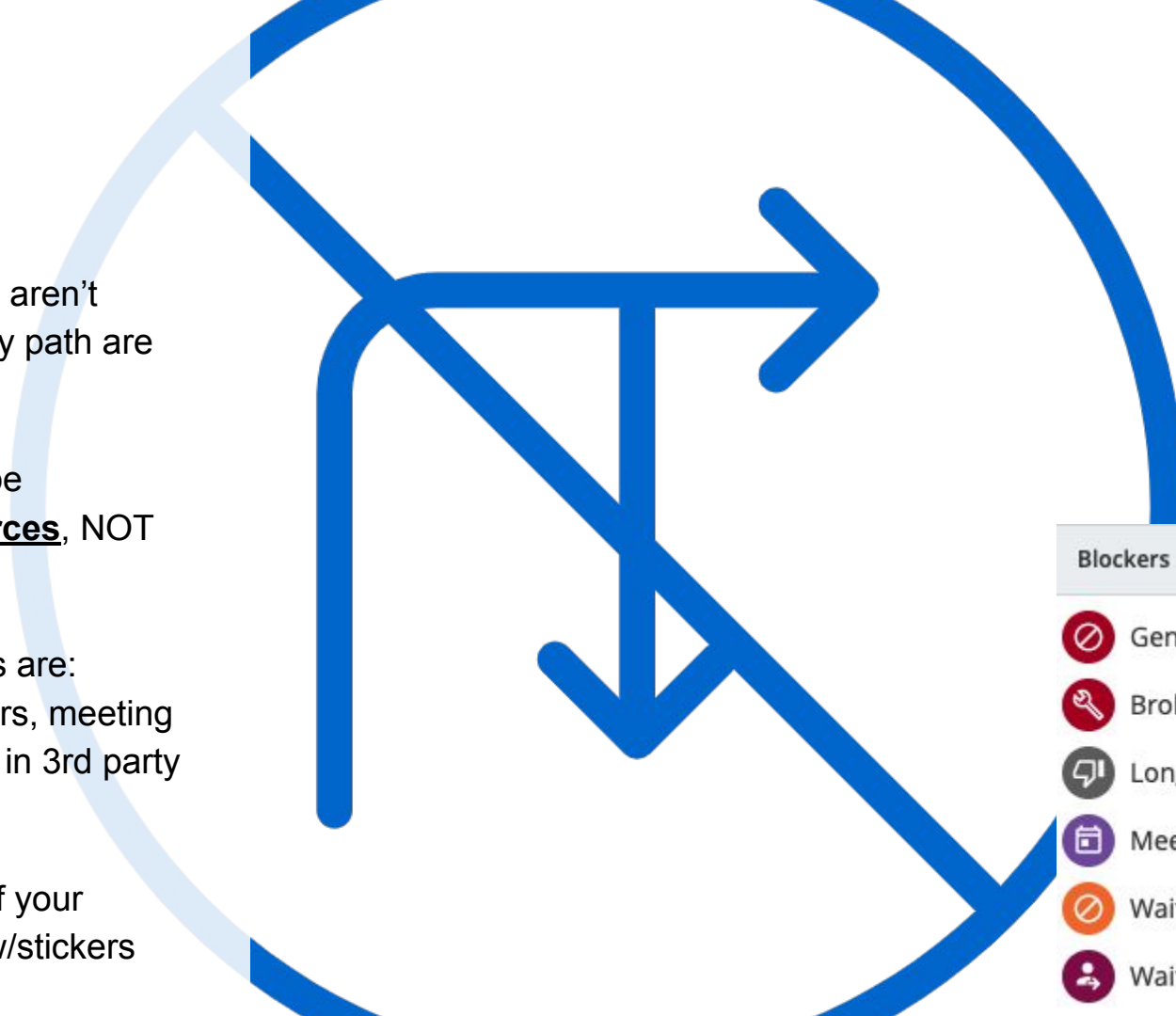
Kanban Blockers

Work items that aren't taking the happy path are blocked







Blocks should be **EXTERNAL forces**, NOT internal delays

Typical blockers are:
Waiting on others, meeting scheduled, bug in 3rd party software, etc.

Indicated any of your blocked items w/stickers

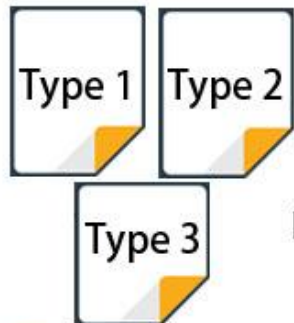


Blockers

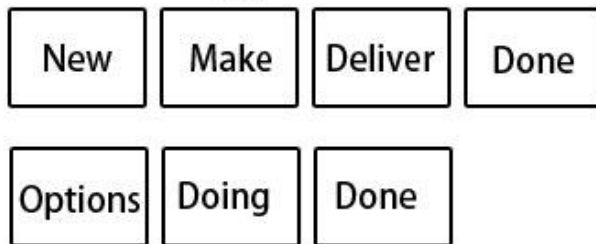
-  Generic Blocker
-  Broken
-  Long term waiting on others
-  Meeting Scheduled
-  Waiting on III
-  Waiting on others

5 Steps to visualizing your work in kanban

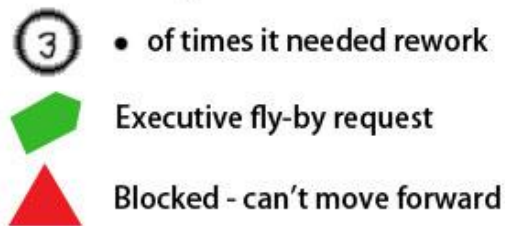
1 List Work Types



2 Define Workflow Steps Per Type

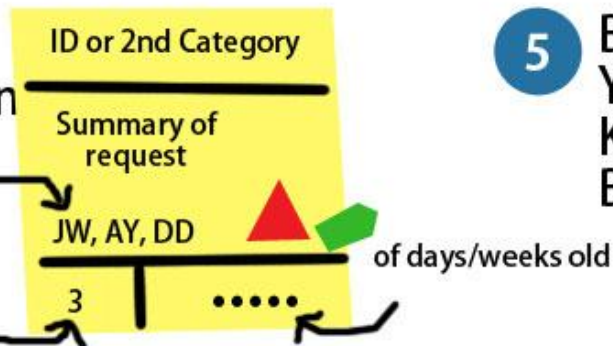


3 Identify & Visualize Key Pain Points

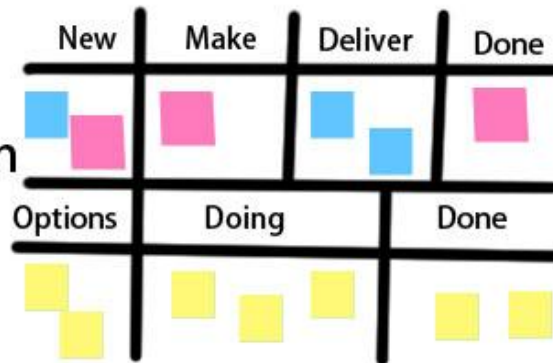


4 Map Key Information to Card

initials of ppl working on card



5 Build Your Kanban Board



YES WE KANBAN



limitedwipsociety.org

Why WIP limits?

One of Kanban's primary functions is to ensure a manageable number of active items are in progress at any one time. **If there are no work-in-progress limits, you are not doing Kanban.** Switching a team's focus halfway through harms the process, and multitasking generates waste and inefficiency.

Setting maximum items per workflow stage ensures that a card is only “pulled” into the next step when there is available capacity.

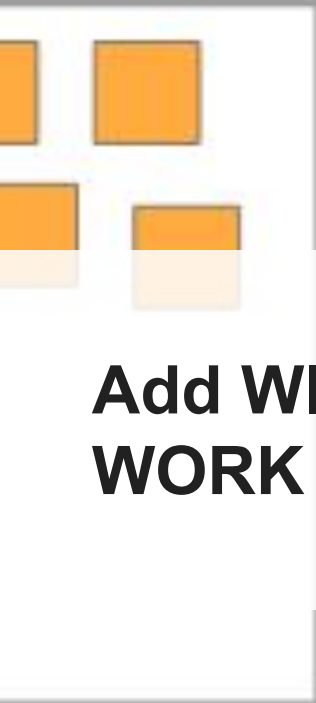

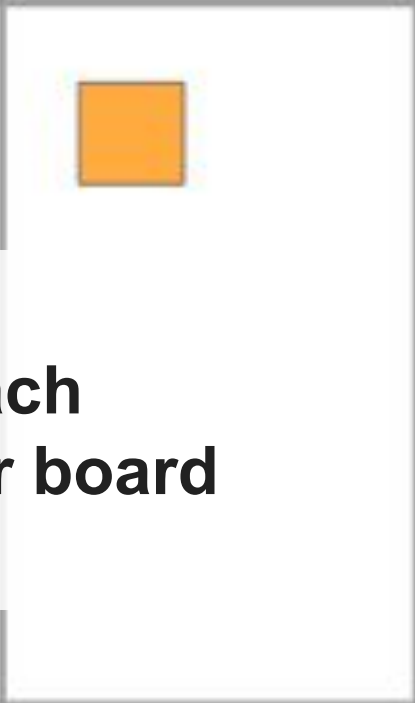

Two ways to set WIP limits

Set your WIP limit to the current number of items you have in your in-progress stage(s). Each week, **LOWER** this number until you achieve a predictable pace of incoming and outgoing work.

Take the **number of people on the team**, **multiply by 2** and set that as the work-in-progress limit for your main “active” stage column.

“WIP limits create a **tension** in the workplace that **forces discussion of problems.**”

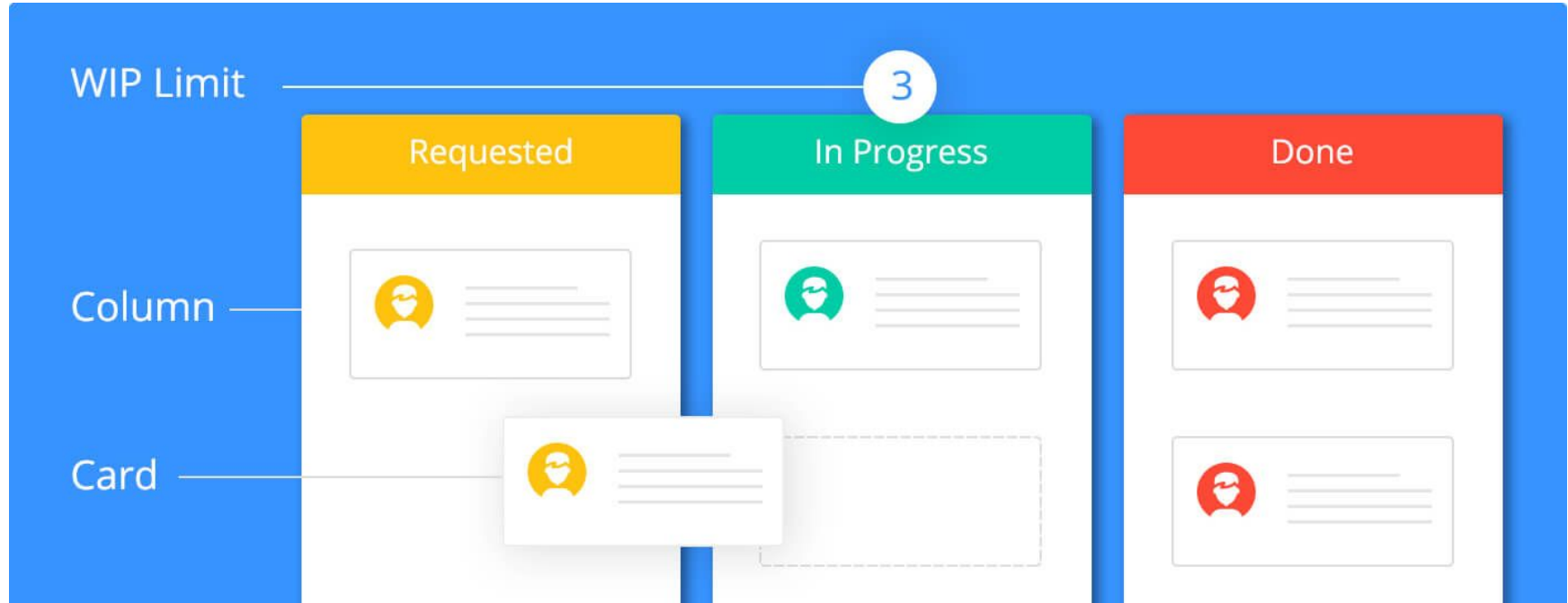
David J Anderson
Kanban: Successful
Evolutionary Change for your
Technology Business

Backlog	Creating (WIP: 3)	Review (WIP: 2)	Publishing (WIP: 1)	Done
				

Add WIP limits to each WORK stage of your board

Simplified Kanban

If you don't have time to examine stages right now



3 columns and a **WIP limit**

Now you have a Kanban board & WIP limits

1

Daily make sure **ALL work items are on the board** and in their proper stage. Review any blocked items and discuss how to unblock them.

2

Daily review the board from RIGHT to LEFT. Discuss how to **finish work you've started**.

3

Regularly meet to **adjust the board stages, WIP limits, board policies, etc.** For work items stuck “in-progress” for a long time, discuss making them into smaller tasks.

4

Regularly meet for replenishment meetings to discuss what **new work you should pull into** the system.

A review of CLC's
Kanban boards and
our software tool



Why CLC Selected Kanbanize?

API - for integrating into CLC's existing Helpdesk

Included space for explicit board policies

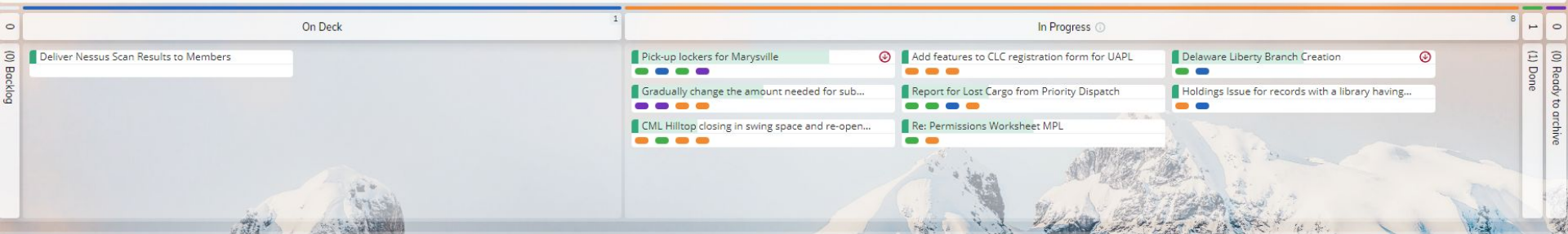
Customization - as simple or complex as needed

Personal dashboards and reporting - for continued evolution

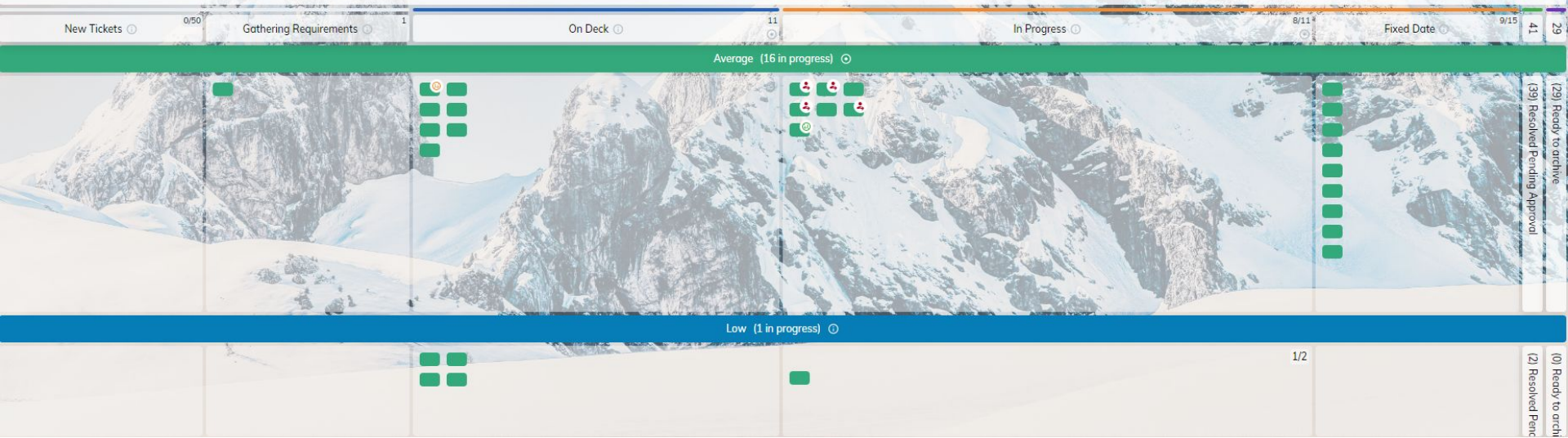
Templates and automation rules

Frequency of updates (new features)

Initiatives



Cards workflow



Cards workflow



1 14 Backlog 85 In Progress 15/19 6 73 0

Default Swimlane (20 in progress)

(0) Incubating Ideas

2142 Kalee Create email blasts for OH-IUG mailing list 15 Sep 2d ↑ Prepare for OH-IUG New subtask...	949 Kelly let patron services know that they could move to patron preference for billing 57d ↑ Deploy Messagebee New subtask...
541 Wes start publishing leap usage information 52d ↑ Create a plan to move to ... New subtask... https://discourse.clcchio.org	760 Wes Come up with a list of potential CLC OKRs for 2022 52d ↑ Figure out how we're goin... New subtask...
1645 None Video Non-Fiction and Video Not Rated report (based off of Juvenile nonfiction and fiction) 28d New subtask...	448 None Automate Upgrade QA steps 45d New subtask... action-plan document... https://discourse.clcchio.org
1056 Wes See if we can come up with a way for patrons to digitally upload address verification information. Like 36d ↑ Make improvements to p... New subtask... action-plan	1594 Kelly Review what's new document for Polaris 7.0 30d ↑ Upgrade Polaris Novemb... New subtask...
1057 Wes Figure out how to buy OCLC metadata service.	1636 None Determine other stakeholders we're going to create fit4purpose

1939 Wes Create MessageBee Presentation for OH-IUG 10 Sep 10d ↑ Prepare for OH-IUG <input type="checkbox"/> create outline <input type="checkbox"/> Create slidedeck <input type="checkbox"/> record presentation <input type="checkbox"/> upload presentation <input type="checkbox"/> fix transcript New subtask...	1298 Wes get communico princ... for fairfield 45d ↑ Work on 2022 budget for ... New subtask...	1596 Kelly Review New Branch Initiative Template 30d ↑ Implement Kanban Boards New subtask...	884 Wes Get new Patron Services chairperson 8 Oct 62d <input checked="" type="checkbox"/> get list of duties and resp... <input type="checkbox"/> think about if someone...
---	---	--	--

1938 Wes Create Kanban OH-IUG presentation 10 Sep 10d ↑ Prepare for OH-IUG <input checked="" type="checkbox"/> create outline <input type="checkbox"/> create slidedeck <input type="checkbox"/> record presentation <input type="checkbox"/> upload presentation <input type="checkbox"/> fix transcript on presenta... New subtask...	1575 Wes Get PAPI accelerated development contract worked on 31d New subtask...	1444 Kalee figure out the process and message for auto-closing helpdesk tickets 38d ↑ Integrate helpdesk with K... New subtask...	2007 Mike Prepare circulation rules OH-IUG presentation 17 Sep 7d ↑ Prepare for OH-IUG
---	---	--	--

1609 Wes Schedule follow-up meeting with CML on budget. 30d ↑ Develop new ILS Annex fo... New subtask...	1150 Wes Delaware 6 day a week delivery 49d New subtask...	493 Wes make changes to 2022 budget spreadsheet 29d ↑ Work on 2022 budget for ... <input type="checkbox"/> when is the date when thi... <input type="checkbox"/> refer to transportation as... <input type="checkbox"/> remove all aspects of havi... New subtask... https://discourse.clcchio.org	1350 Kalee make an upgrade kanban checklist template 15 Sep 41d <input type="checkbox"/> 1
---	--	---	--

2155 Wes Turn off chat in main clcipc@clcchio.org zoom settings 22 Sep 2d ↑ Prepare for OH-IUG New subtask...	2156 Wes Turn on zoom chat in the main clc room - it was turned off for ohug 27 Sep 2d ↑ Prepare for OH-IUG New subtask...	1969 Wes Pull numbers for 2022 budget 4 Oct 8d ↑ Work on 2022 budget for ... Gather statistics for Librar... New subtask...	474 Jamal create reboot step as part of prodras cert renewal 31 Oct 51d <input checked="" type="checkbox"/> write pseudo code to mo... <input type="checkbox"/> check when cert renews t... New subtask... https://discourse.clcchio.org	2197 Mike Remove CLC summer reading application 14 Oct 1d
--	---	---	---	--

(0) Ready to archive

(70) Done

Cards Assigned to Me



CARD ID	TITLE	PRIORITY	BOARD NAME	SECTION
2142	Create email blasts for OHIUG mailing list	High	Other CLC Items	Requested
2117	SearchOhio lable question	High	Helpdesk Tickets	In Progress
2099	Make sure committee chair posts meeting minutes to Discourse	High	Committee Meetings	Requested
2098	Send meeting minutes to committee chair for review	High	Committee Meetings	Requested
2082	Make Kanban tasks for any follow up items	Medium	Committee Meetings	Requested
2080	Prepare slide deck	Medium	Committee Meetings	Requested

39 Results found

Overdue Cards Assigned to Me



No results found

0 Results found

Blocked cards Assigned to Me



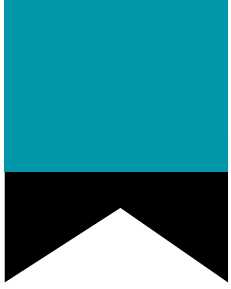
CARD ID	TITLE	ASSIGNEE	BLOCK REASON	DEADLINE
2117	SearchOhio lable question	Kalee	Waiting on others (Waiting to hear back from the SLO)	

1 result found

[ADD WORKSPACE](#) / [ADD WIDGET](#)



Impacts of Kanban at CLC



Quotes from CLC Staff

“It’s like going from a 2-D view of our work to a 3-D view of the work.”

“I finally understand what the rest of the team is working on.”

“I’m happy we can talk about how we do the work as a team, rather than just project status updates.”

Kanban Metrics

31% **decrease** in time to resolution (85% confidence level)

21% **decrease** in cold cases (tickets opened more than 1 month)

161% **increase** in meetings with team and stakeholders

Resources to
learn more



Kanban Resources

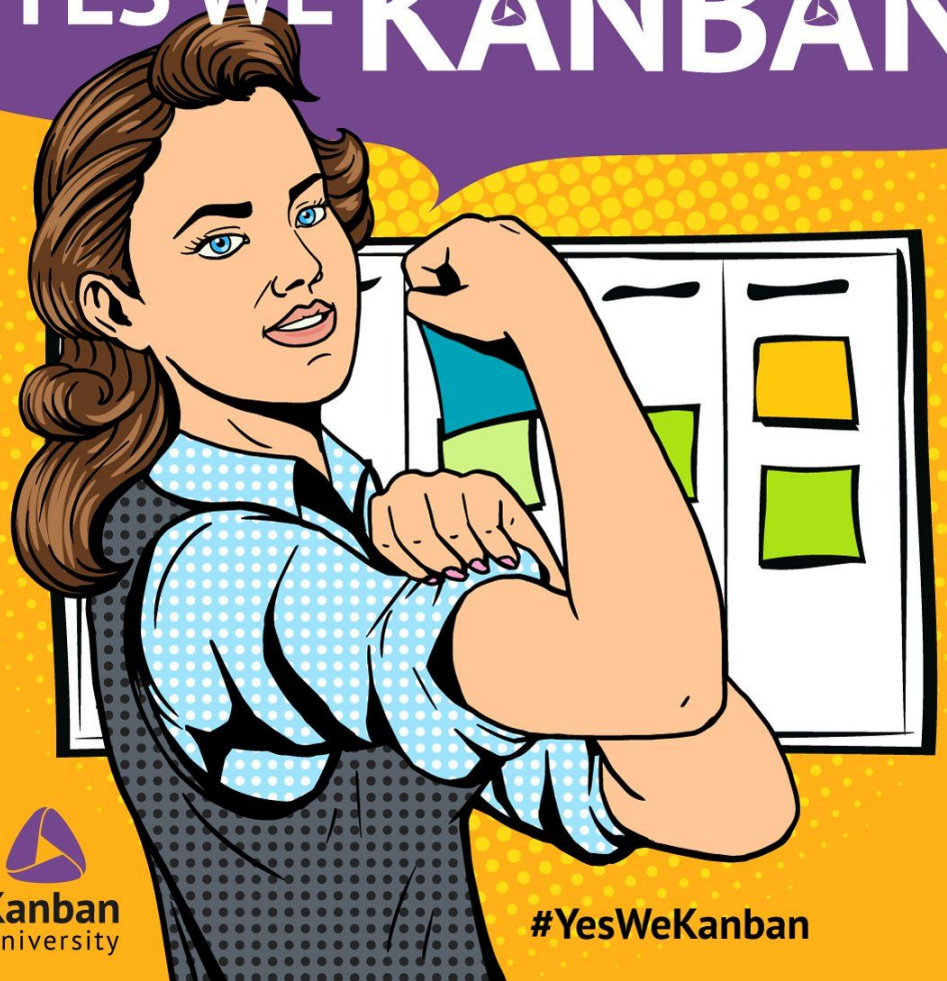
[Planview Kanban roadmap](#) - Implementing Kanban in 5 steps

[Official Guide to the Kanban Method](#)

[Project Manager's Guide to Kanban](#)

[Applied Frameworks Kanban System Design Training](#) (paid)

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Thanks!

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Kalee Burkett: kfouts@clcoho.org

[Register for Q&A September 24, 2021](#)

[Get a copy of the slides](#)