

Rough Guide to Kanban References

People need a reasonable level of Kanban expertise to facilitate the Rough Guide **Improvement Loop**. With that in mind, this document provides some references for the options given in the **Rough Guide to Kanban Practices**.

In practice, the best way to develop the required level of knowledge is to develop ongoing interest and learning over time. To start with you just need to know what each of the options are (roughly) and why they would be worth using.

Introduction

Always use your goals, *kanban principles*, *values* and *agendas* to help select what practice might help you next. It's about improvement, not adoption!

There are a number of “core” Kanban books that contain references for the Kanban Principles, Values & Practices. They also include most of the options from the rough guide.

It would make sense to get hold of one or more copies of these and add them to the company library :

Anderson, David J. ***Kanban: Successful Evolutionary Change for Your Technology Business***. Sequim, WA, Blue Hole, 2010.

Burrows, Mike. ***Kanban from the inside: Understand the Kanban Method, Connect It to What You Already Know, Introduce It with Impact***. Sequim, WA, Blue Hole Press, 2014.

Anderson, David J., and Andy Carmichael. ***Essential Kanban Condensed***. Seattle, WA, Lean Kanban University Press, 2016.

Vacanti, Daniel S. ***Actionable Agile Metrics for Predictability***. N.p.: Leanpub, 2016. Print. <https://leanpub.com/actionableagilemetrics>

Carrol, Ian. ***The Card Wall User Guide***. British Columbia, Leanpub, 2015. <https://leanpub.com/cwug>

You can get a *free* PDF download from of *Essential Kanban Condensed* here:
<http://leankanban.com/guide/>

For each of the Principles, Values & Practices, and Options for the Practices a start point for study has been included, in some cases with additional online references.

*Rough Guide to Kanban Facilitators should ideally have an **ongoing deepening** knowledge of the Principles, Values & Practices in addition to the various options for the Practices.*

Kanban Change Management Principles	<ul style="list-style-type: none">• http://www.djaa.com/principles-general-practices-kanban-method• http://leankanban.com/kanbans-change-management-principles/
Kanban Service Delivery Principles	<ul style="list-style-type: none">• http://leankanban.com/kanbans-service-delivery-principles/
Kanban Values	<ul style="list-style-type: none">• http://kanbantool.com/kanban-library/why-kanban/introducing-kanban-through-its-values#.WT6aCBPyvMU
Kanban Agendas	<ul style="list-style-type: none">• http://www.djaa.com/kanbans-3-agendas
Kanban Practices	<ul style="list-style-type: none">• http://www.djaa.com/principles-general-practices-kanban-method

Practices

Key

Green Options	These are good-ish places to start, foundational practices that the majority of teams using Kanban (rather than just proto-kanban) will use.
Yellow Options	These are a wider range of options for moving towards your goals. Some are regularly used by many teams, others are less used or more advanced. There's no need to "do all the greens" first, or to "do all the yellows."

Visualise Workflow

Demand Analysis / Work Item Types	<ul style="list-style-type: none"> • Kanban, p. 64
Workflow Visualisation / Kanban Board	<ul style="list-style-type: none"> • Essential Kanban Condensed, p.18
Commitment and Delivery Points	<ul style="list-style-type: none"> • Essential Kanban Condensed, Describing Flow systems p.13
Work Item Ticket Design	<ul style="list-style-type: none"> • Kanban, p.70
Avatars	<ul style="list-style-type: none"> • The Card Wall User Guide, p. 7 • http://leankanban.com/patterns-of-kanban-maturity/
Swim Lanes	<ul style="list-style-type: none"> • Kanban from the Inside, Design Kanban Systems p. 203 • Kanban, p.155 • https://leankit.com/learn/kanban/kanban-board-examples-for-development-and-operations/ • https://zsoltfabok.com/blog/2013/09/when-not-to-use-swim-lanes/
Backlog Visualisation	<ul style="list-style-type: none"> • The Card Wall User Guide, Backlog Visualisation & Management, p.12
Electronic Tracking	<ul style="list-style-type: none"> • Kanban, p.72 • The Card Wall User Guide, Distributed Development, p.25 • This is widely debated and some people have gone to extreme lengths to get the best mix of electronic and physical boards: https://jimflow.jimdo.com/ • Here are a couple of the more balanced views on the topic from the web: <ul style="list-style-type: none"> ○ http://blog.nwcadence.com/kanban-boards-physical-or-virtual/ ○ http://www.agileweboperations.com/kanban-boards-physical-or-electronic
Modelling Concurrent Activity	<ul style="list-style-type: none"> • Kanban, p. 73
Modelling Unordered Activity	<ul style="list-style-type: none"> • Kanban, p.74
Sticky Buddies	<ul style="list-style-type: none"> • Kanban, p.88

Limit Work In Progress

Some kind of WIP control (Choose from the list below)	<ul style="list-style-type: none"> • Kanban from the Inside, Limit WIP, p.15 • Kanban, Chapter 10, Setting WIP Limits, p.113 • Actionable Agile Metrics, p. 20 • http://leankanban.com/patterns-of-kanban-maturity/ • https://leankit.com/blog/2014/03/limiting-work-in-progress/
Column / State WIP Limits	<ul style="list-style-type: none"> • See references at the top of this section
Person WIP Limits	<ul style="list-style-type: none"> • See references at the top of this section
Allocated Capacity (Lane WIP Limits)	<ul style="list-style-type: none"> • Kanban, p.120, 134
Board Level WIP Limits	<ul style="list-style-type: none"> • See references at the top of this section

Manage and Measure Flow

Cumulative Flow Diagram (CFD)	<ul style="list-style-type: none"> • Simple 2 minute explanation: https://www.youtube.com/watch?v=eo2uv8avEsU&t=26s • Actionable Agile Metrics, p.60-156
Queue Replenishment (Cadence and Policy)	<ul style="list-style-type: none"> • Kanban, p.84 • Kanban from the Inside, p.10 • http://blog.kanbanery.com/the-seven-kanban-cadences/
Lead Time Distribution (average, sized, weighted)	<ul style="list-style-type: none"> • Kanban, p.140 • https://connected-knowledge.com/2014/09/06/analyzing-lead-time-distribution-chart/
Flow Efficiency	<ul style="list-style-type: none"> • Actionable Agile Metrics, p. 31, 271 • Kanban from the inside, p.187
Input Queue Prioritisation Method	<ul style="list-style-type: none"> • Search for: MoSCoW, HiPPO, Shortest Weighted Job First, Cost of Delay Divided by Duration, Relative ROI, Cost / Effort Matrix • Stakeholder Prioritisation • Kanban: Striking a new bargain, p.41
Input Queue Sizing	<ul style="list-style-type: none"> • Kanban, p. 116
Throughput	<ul style="list-style-type: none"> • Actionable Agile Metrics, p. 32

	<ul style="list-style-type: none"> • Kanban p. 142 • https://weblogs.asp.net/wallen/throughput-vs-velocity
Classes of Service	<ul style="list-style-type: none"> • Kanban, Chapter 11, p. 123 • Kanban from the Inside, Chapter 21, p. 197 • Essential Kanban Condensed, Manage Flow, p. 21 • The Card Wall User Guide, p.24
Clarified and displayed Service Level Expectations	<ul style="list-style-type: none"> • Essential Kanban Condensed, Manage Flow p.22, Kanban Litmus Test p. 30
Due Date Performance	<ul style="list-style-type: none"> • Kanban, p.142
Set Service Delivery Targets	<ul style="list-style-type: none"> • Kanban, p.132
Initial Quality (Defects per work item)	<ul style="list-style-type: none"> • Kanban, p. 145
Release Planning	<ul style="list-style-type: none"> • Kanban p.85 • Actionable Agile Metrics, Chapter 17, p.255
Triage (in or out)	<ul style="list-style-type: none"> • Kanban, p.86
Failure Load (Production Defect Rate)	<ul style="list-style-type: none"> • Kanban, p. 146, 216
Handling External Dependencies)	<ul style="list-style-type: none"> • Essential Kanban Condensed, Depth-Wise Growth, p. 43 • Kanban from the Inside, p.206 • https://www.linkedin.com/pulse/scaling-teams-managing-dependencies-ronald-doelen • http://www.optimiseagility.com/the-dependency-wall/
Backlog Prioritisation Method	<ul style="list-style-type: none"> • Search, MoSCoW, HiPPO, Shortest Weighted Job First, Cost of Delay Divided by Duration, Relative ROI, Cost / Effort Matrix • Stakeholder Prioritisation
Defect Percentage Rate	<ul style="list-style-type: none"> •
Net Flow Per Week	<ul style="list-style-type: none"> • http://focusedobjective.com/free-tools-resources/
Value Based Work Item Granularity (MMF)	<ul style="list-style-type: none"> • Kanban p.152 (group items by MMF/R and prioritise those by value)

Feedback Loops

Essential Kanban Condensed, Implement Feedback Loops p.23 onwards

<http://www.djaa.com/kanban-cadences>

Kanban Meeting	<ul style="list-style-type: none">• Kanban from the Inside, p.9• Kanban, p.82
Ops Review	<ul style="list-style-type: none">• Kanban, Chapter 14, p.159
Show and Tell	<ul style="list-style-type: none">• The Card Wall Handbook, p.15, 16
Issue Log Review / Escalation	<ul style="list-style-type: none">• Kanban, p.87• Kanban, Chapter 20, p.235
Horizon Planning	<ul style="list-style-type: none">• Co-ordinating company strategy, product strategy and queue replenishment• http://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/enduring-ideas-the-three-horizons-of-growth
Risk Review	<ul style="list-style-type: none">• Essential Kanban Condensed, Implement Feedback Loops p.23 onwards
Service Delivery Review	<ul style="list-style-type: none">• Essential Kanban Condensed, Implement Feedback Loops p.23 onwards• https://mattphilip.wordpress.com/2017/05/24/service-delivery-review-the-missing-agile-feedback-loop/

Explicit Policies

Make Current Policies Explicit	<ul style="list-style-type: none">• Make what you do now visible as policies• Kanban from the Inside, Core Practice 4: Make Policies Explicit, p. 7
Definition of Done	<ul style="list-style-type: none">• Explicit Policy that needs to be met before an item can be released https://dzone.com/articles/definitions-done-practice
Definition of Ready	<ul style="list-style-type: none">• Explicit Policy that needs to be met before a work item can be pulled into development
Pull Policies per state	<ul style="list-style-type: none">• Create pull policies that set out what needs to be true for an item to be pulled into the next column.

	Definition of Done / Ready are examples of pull policies.
Discard Policy	<ul style="list-style-type: none"> • Explicit policy for when work items should be discarded

Collaborative Improvement

Kanban from the Inside, Chapter 3, Collaboration, p.25

Retrospectives	<ul style="list-style-type: none"> • https://www.wibas.com/scrum/5-steps-of-a-retrospective/en • The classic 5 steps from <i>the</i> retrospective book (https://pragprog.com/titles/dlret/agile-retrospectives)
Blocker Clustering	<ul style="list-style-type: none"> • https://www.infoq.com/articles/blockers-defects-process-improvement
Formal Improvement Experiments	<ul style="list-style-type: none"> • Kanban from the Inside, p.28 • https://medium.com/lean-product-development/kanban-boards-for-hypothesis-driven-development-32f99a70e8ee
Cross Team Retrospective	<ul style="list-style-type: none"> • The Card Wall Hand Book, p.18
Improvement Experiments on Card Wall	<ul style="list-style-type: none"> • Your experiments are tickets on your kanban board
Separate Improvements Card Wall	<ul style="list-style-type: none"> • https://medium.com/lean-product-development/kanban-boards-for-hypothesis-driven-development-32f99a70e8ee
Theory of Constraints - 5 focusing steps	<ul style="list-style-type: none"> • Kanban from the Inside, p.100 • Kanban, p.188 • http://www.tocinstitute.org/five-focusing-steps.html
Theory of Constraints - Thinking Tools	<ul style="list-style-type: none"> • Kanban from the Inside, Chapter 12, p.99 • http://www.dbrmfg.co.nz/Thinking%20Process.htm
Applied Cost of Delay	<ul style="list-style-type: none"> • Kanban, Chapter 11, p.123 • Kanban from the inside, p.138 • Essential Kanban condensed, Manage Flow, p.21 • http://blackswanfarming.com/cost-of-delay-divided-by-duration/

Real Options and Deferred Commitment	<ul style="list-style-type: none"> • Kanban from the Inside, p.143 • http://www.lulu.com/shop/chris-matts/real-options-at-a-gile-2009/ebook/product-17416200.html
STATIK and reverse STATIK	<ul style="list-style-type: none"> • Kanban from the Inside, p.173
Agendashift	<ul style="list-style-type: none"> • https://www.agendashift.com