Evolutionary Patterns

in

Portfolio Kanban

ScatterSpoke

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Kanban Has Two Meanings

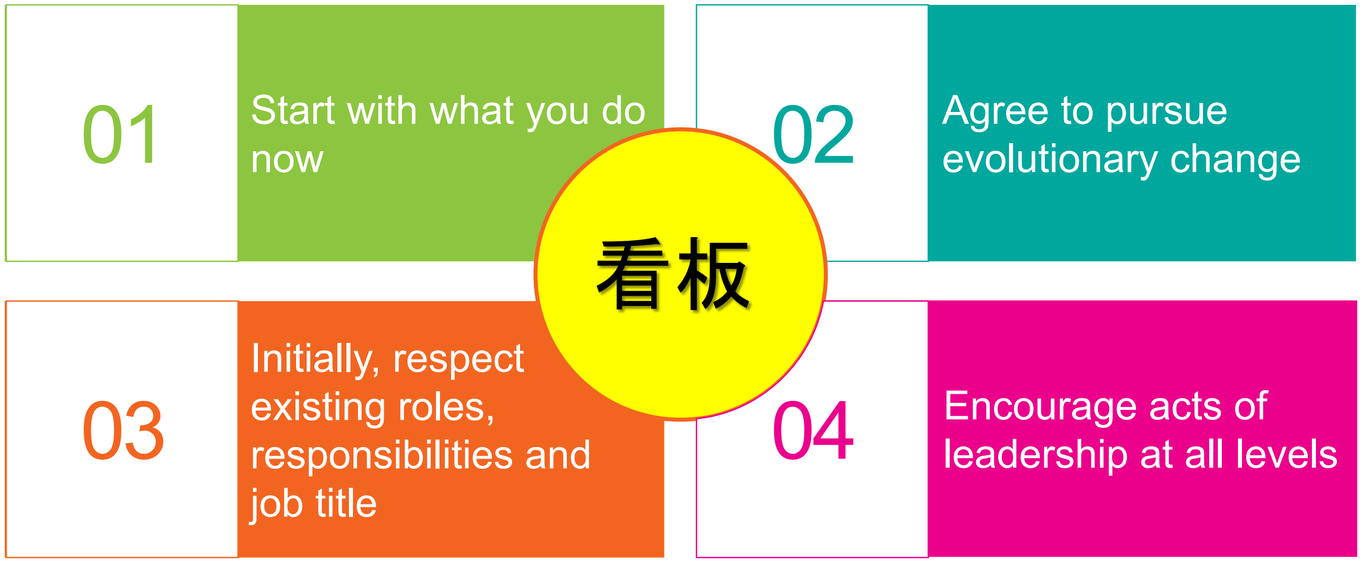
Kanban has two meanings:

Both meanings are incorporated into the Kanban Method:

Kanban written in Kanji (Chinese characters)
看板 means “sign” or “large visual board”

Kanban written in Japanese alphabet, hiragana,
かんばん means signal cards(s)

Kanban Principles



Stop Starting

Start Finishing

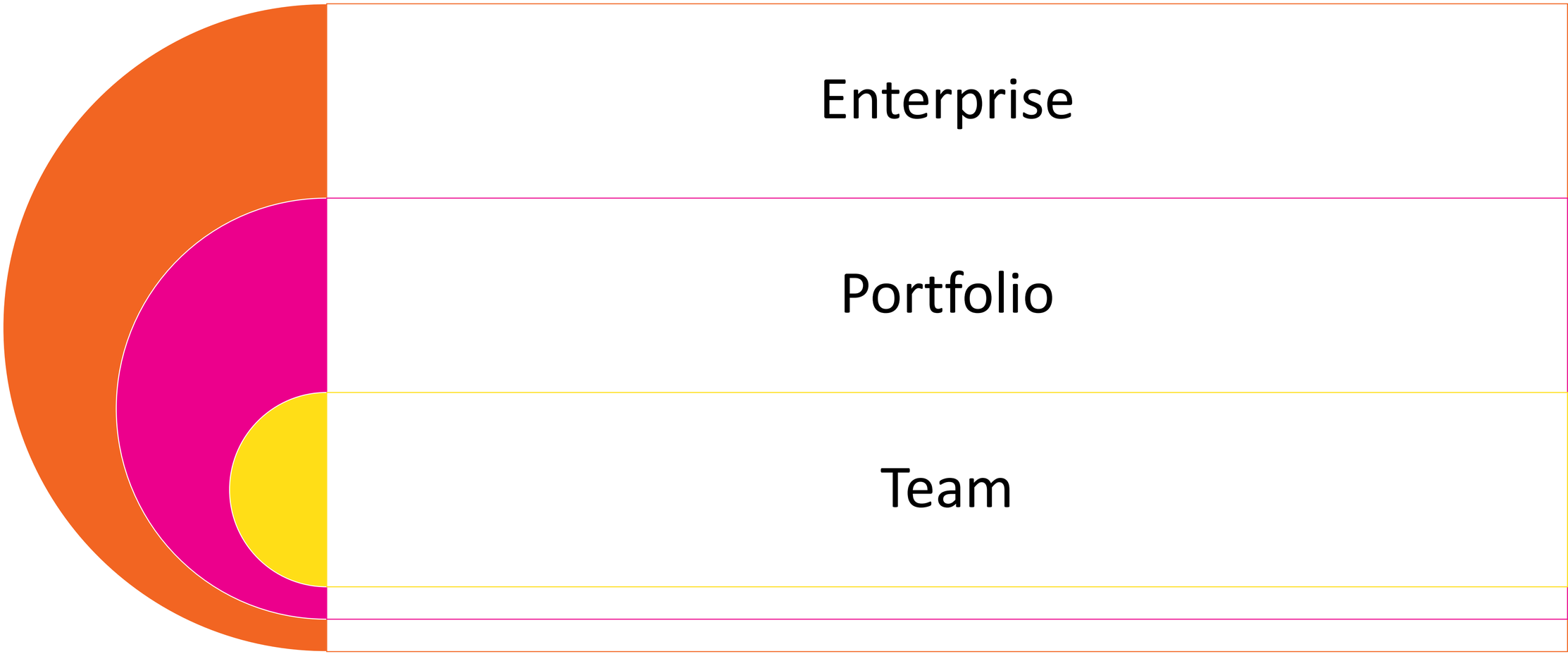
Kanban Practices

- VISUALIZE WORK
- LIMIT WORK-IN-PROGRESS
- MANAGE FLOW
- MAKE POLICIES EXPLICIT
- IMPLEMENT FEEDBACK LOOPS
- IMPROVE COLLABORATIVELY, EVOLVE EXPERIMENTALLY

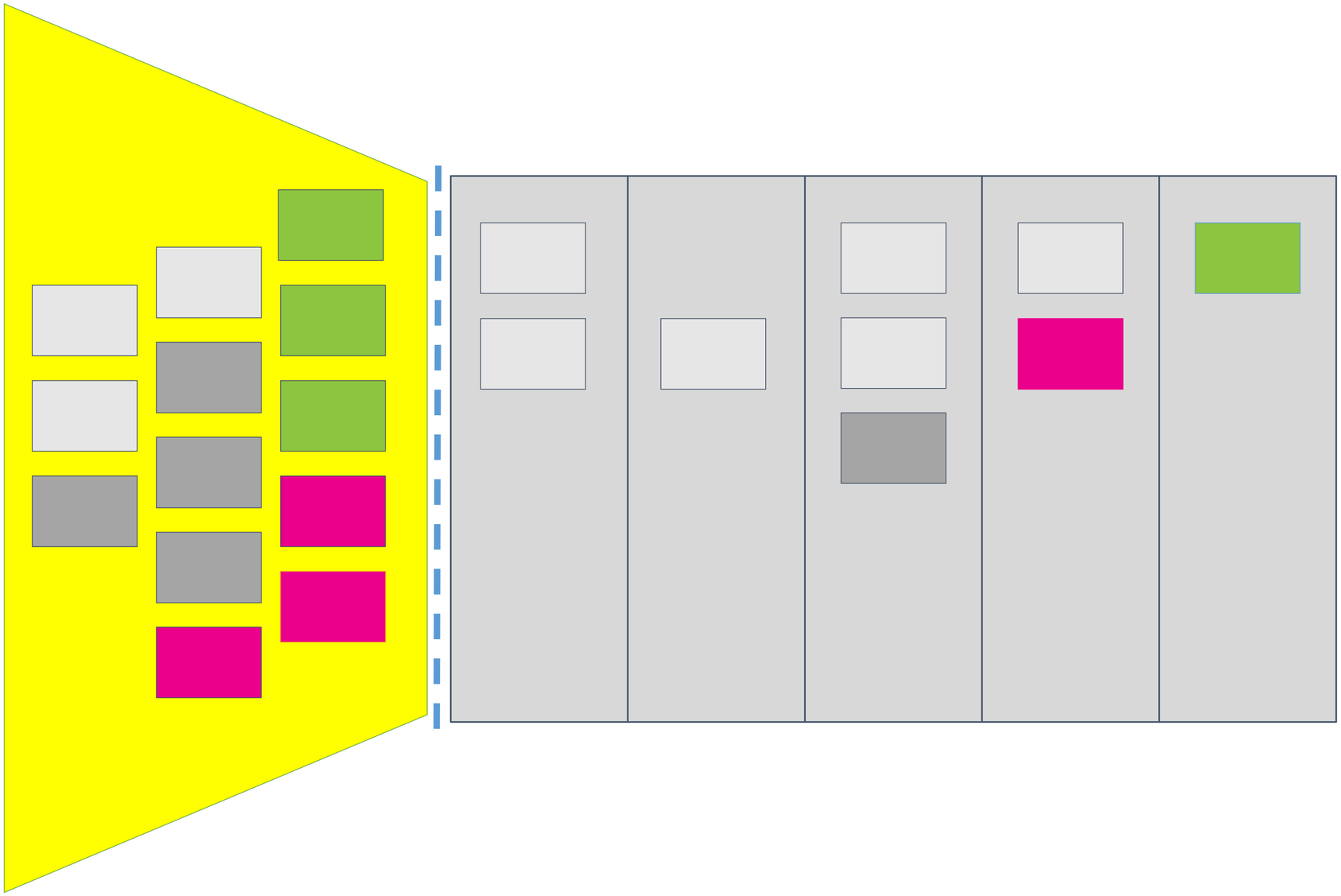
What is Portfolio Kanban?

A pull system designed to **visualize, manage and measure** features from idea to delivery.

Kanban at all Levels

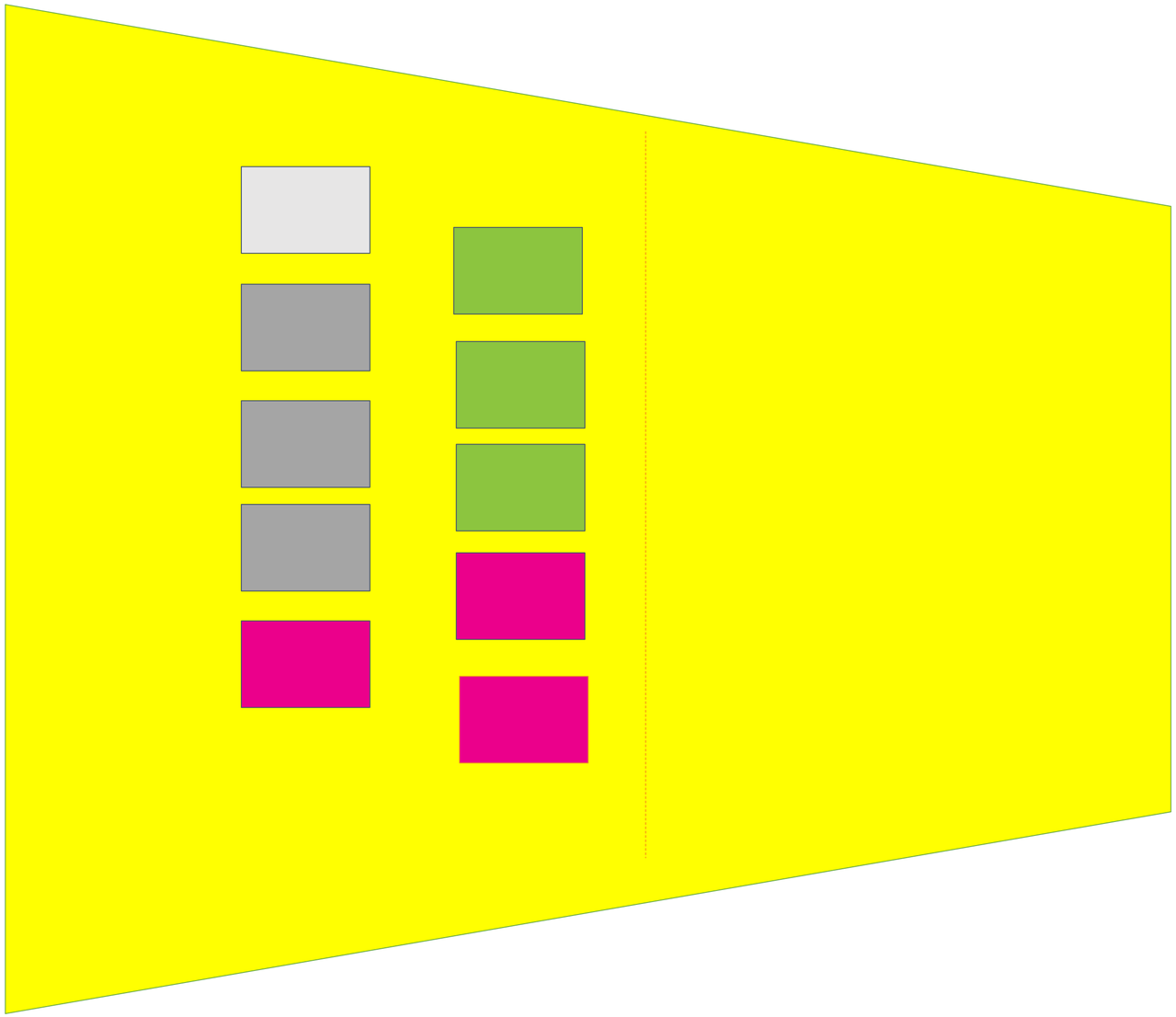


Discovery & Delivery



Life cycle of a feature, epic or project

Problem Validation

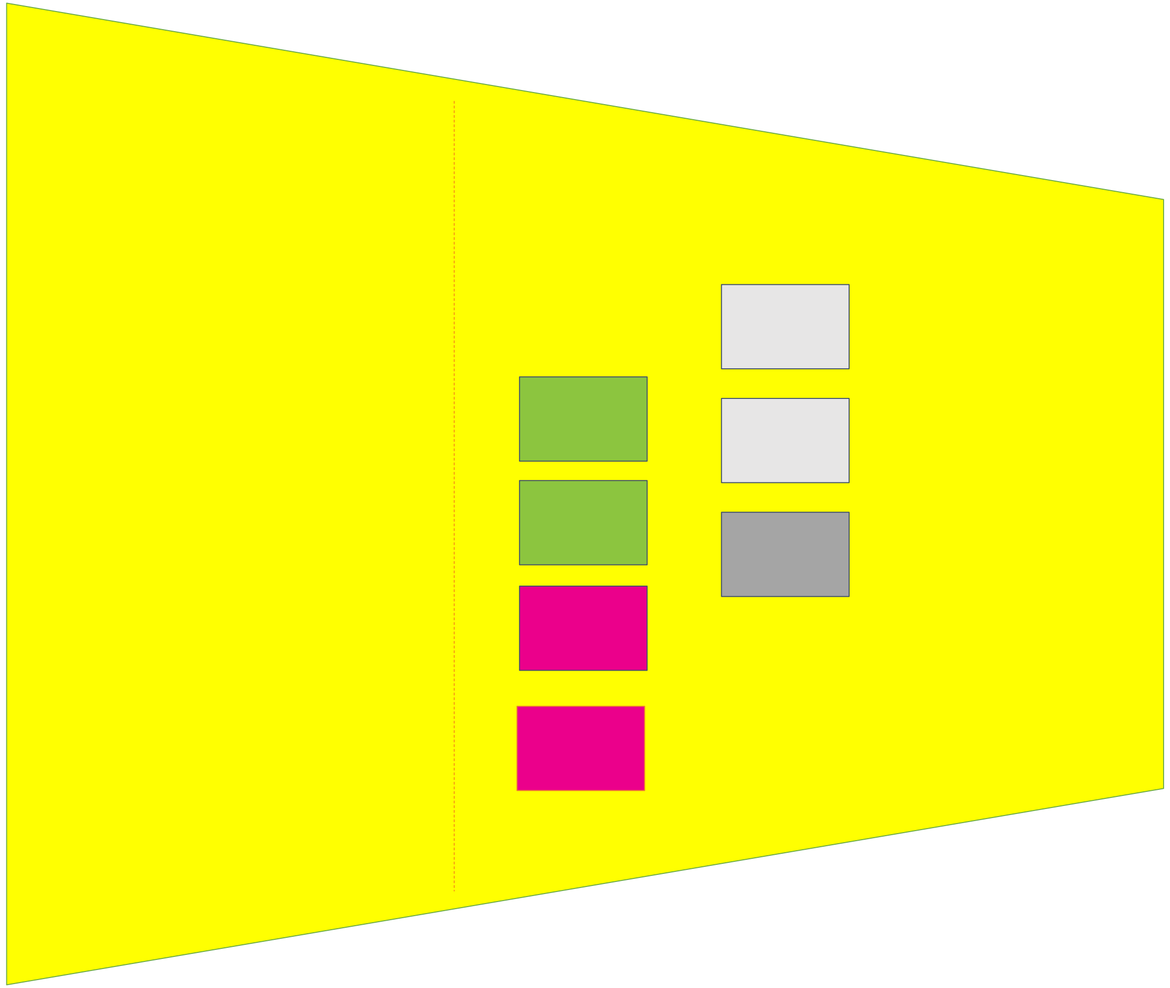


Start with the Problem

Do not jump straight to the solution, explore pain points, user requests, help desk logs.

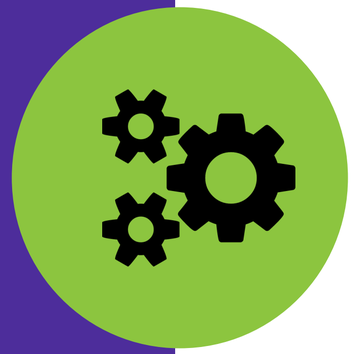
- What problem are we trying to solve?
- How can we validate that these problems exist?
- What is the urgency to address them?
- What current solutions exist (even work arounds)?
- How will we test this?

Solution Validation



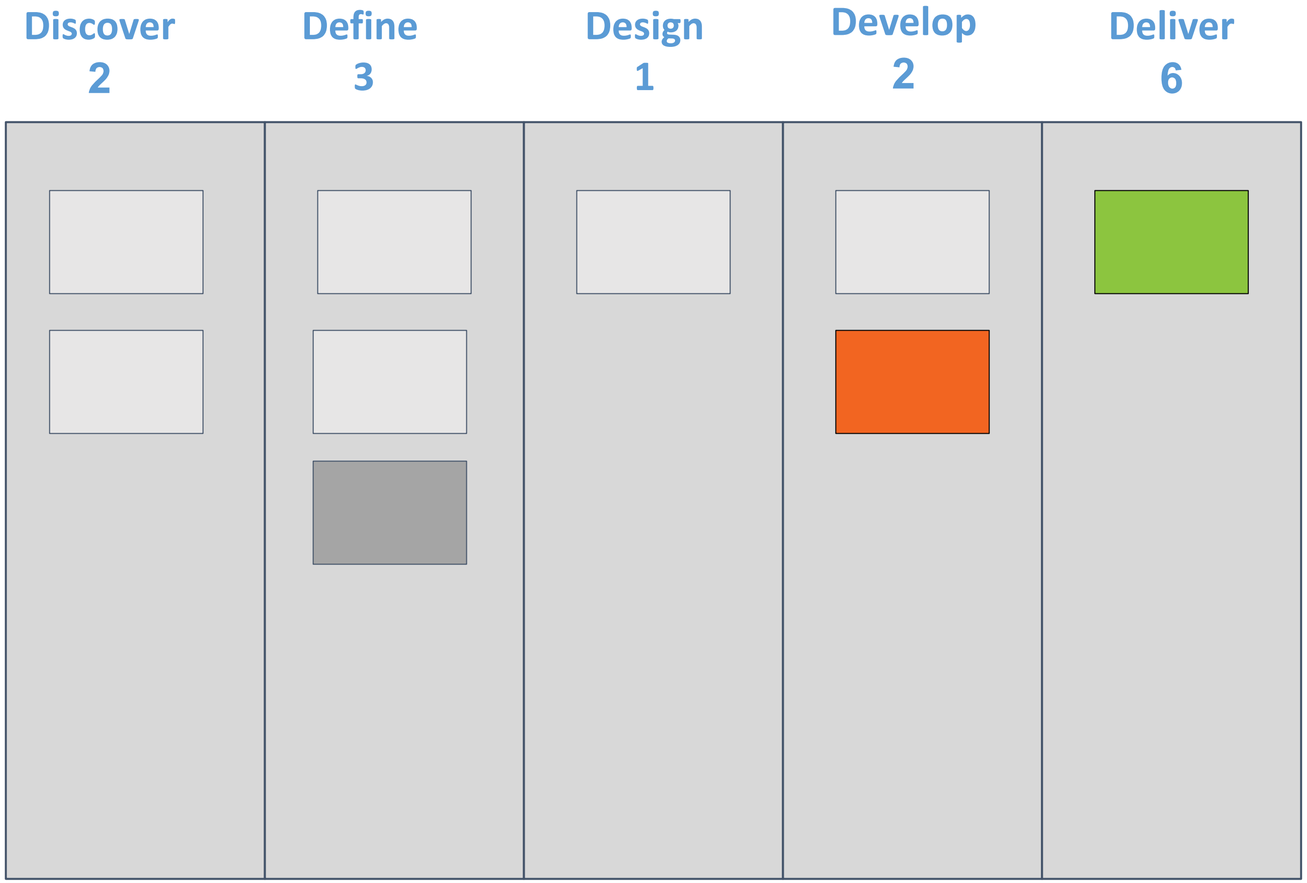
Experiment with Solutions

Brainstorm solutions to the users specific problem.



- How can you solve their problem in a way that others can't?
- Can you solution be easily replicated?
- What if this problem goes away?
- How will our solution be unique?

Map the Stages

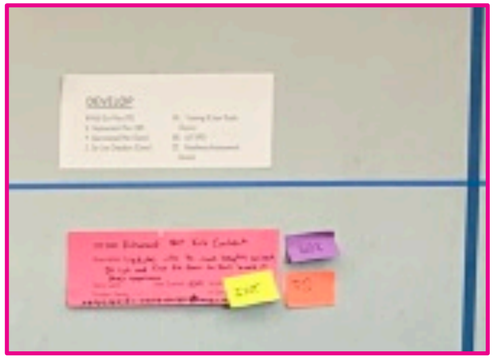


Identify the Activities

Map the life cycle of an epic.

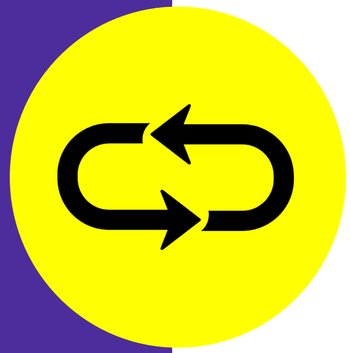
- What are the standard work items that we do every time?
- Who is responsible for completing each item?
- Could we start some of these activities earlier?
- How can we avoid silos and handoffs?

Alignment of policies



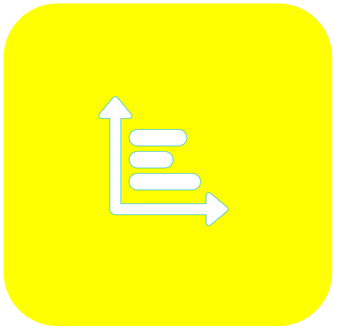
Leverage Feedback Loops

Fold learning into each phase.



- Use data to make decisions
- When to start based on % complete
- Refine process based on tracking
- Make success metrics clear and visible

Measuring Outcomes



Gather usage and adoption metrics

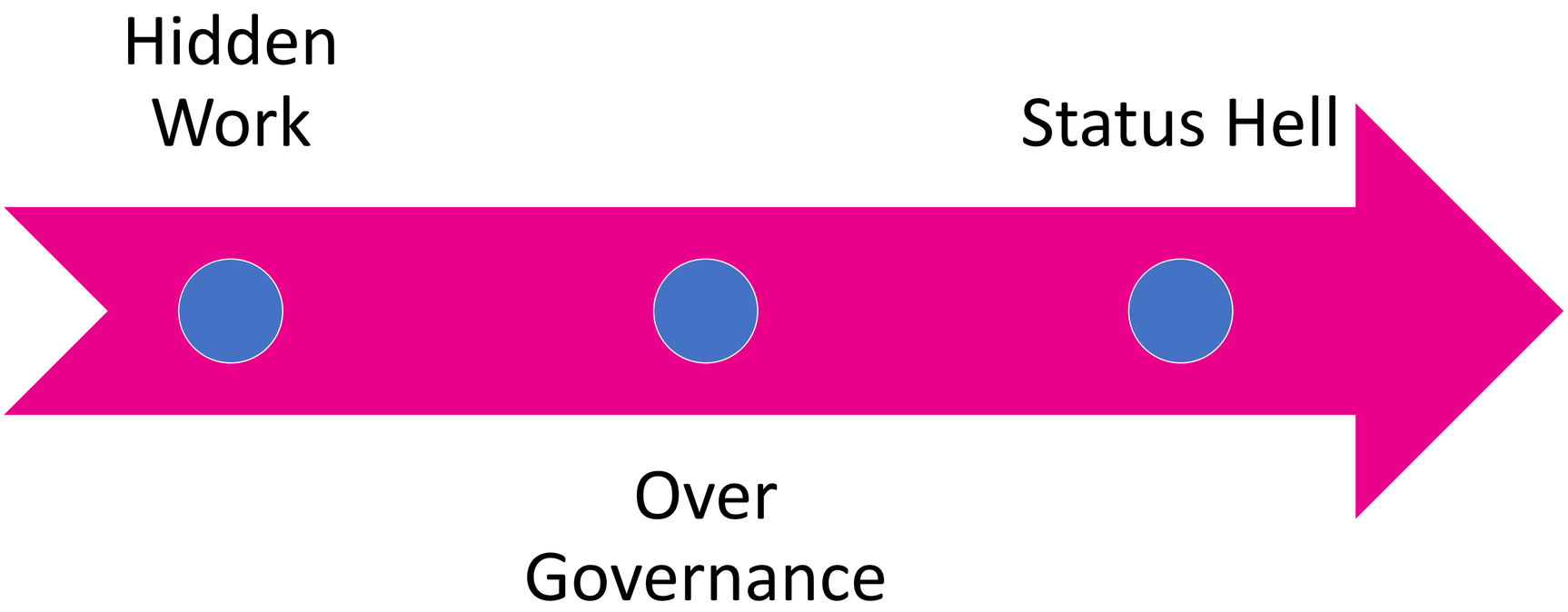
Set success metrics up front

Share value and outcomes with the team

Create space between features

Make data visible and easily accessible

RESISTANCE



1. Hidden Work

The work that we talk about **but never show** on the board.

Don’t Show, Don’t Tell

- The portfolio board only highlights what people *want* to see and talk about
- Watch for the hand waving:
  - Blocked by XYZ
  - Pull off to do XYZ
  - Someone asked me to help with this real quick.

2. Over Governance

Using the board and process to **create accountability** over other people.

Your going to need approvals for that.

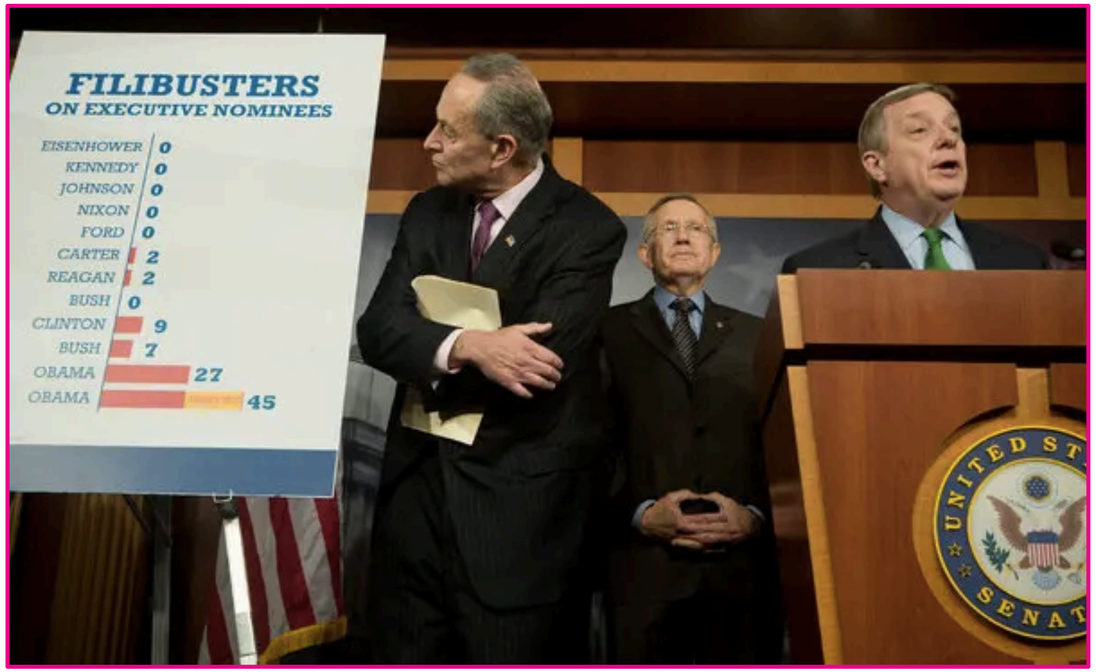
- An abundance of exit policies to account for every possible thing that could ever happen
- Everyone wants to check one million boxes to show their part is done

3. Status Hell

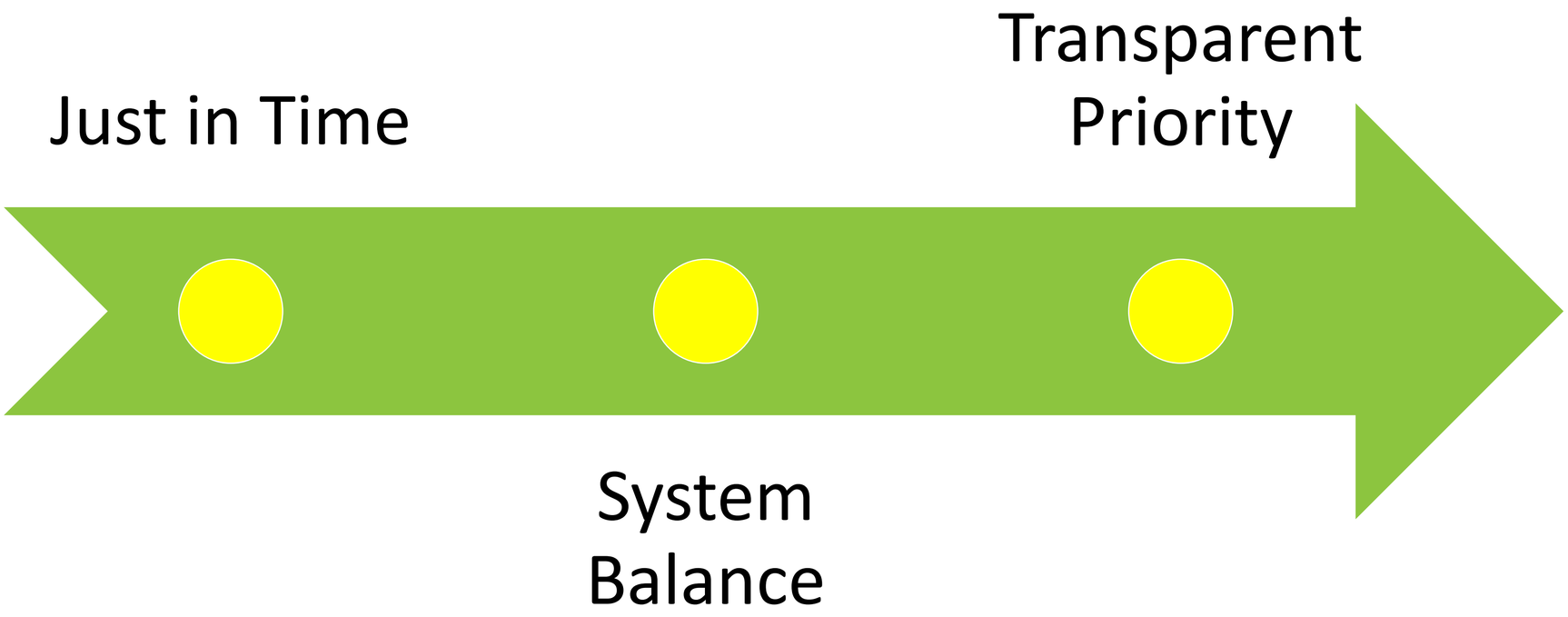
Running through the **same irrelevant updates** about epics at every stand up.

I'll keep talking so you stop asking.

- Exposing information puts people on the defensive so they arm themselves with status



REWARD



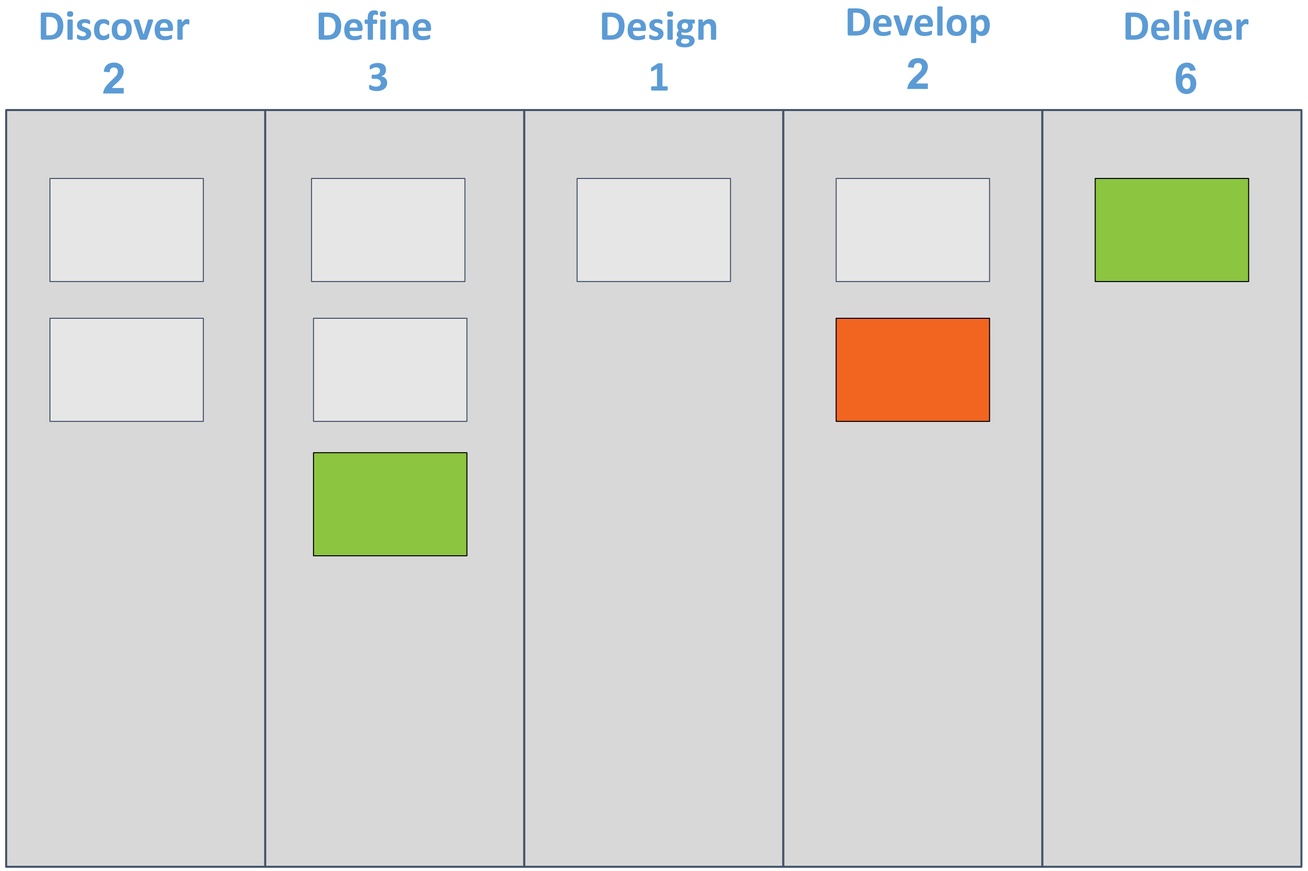
4. Just in Time

Breaking free of the need to have 6 months worth of stories in the backlog.

Relevant Information

- Only need to fully define each feature when you are ready to pull
- Create space to incorporate learning from the past
- Give opportunity to pivot or change scope

Look for Next to Pull



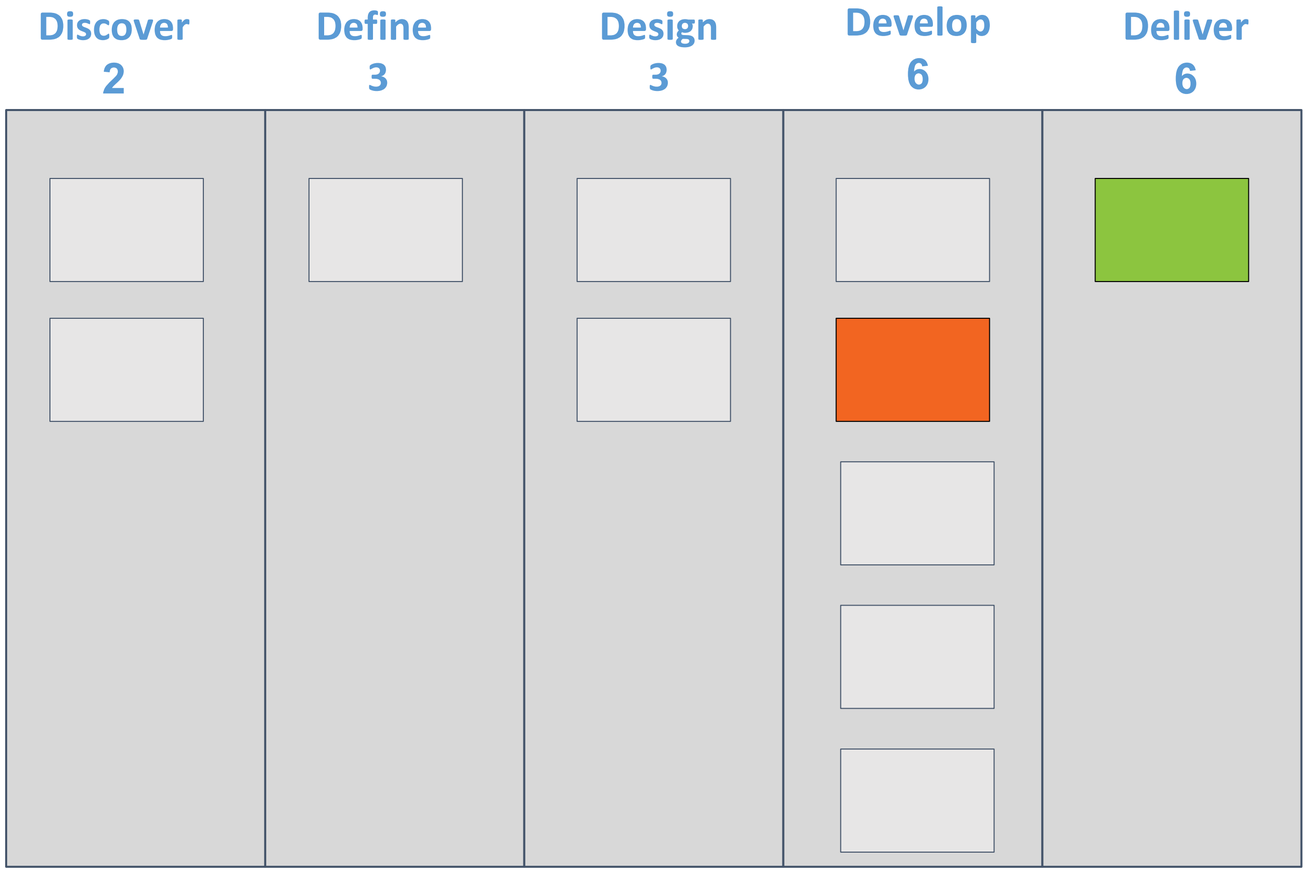
5. System Balance

Understanding that the capacity of engineering **shouldn’t dictate the WIP** of other parts of the system.

WIP Limits Create Flow

- Minimizes multi-tasking/context switching
- Reduces overburdening in the business
- Exposes capacity issues & bottlenecks

Identify System Capacity



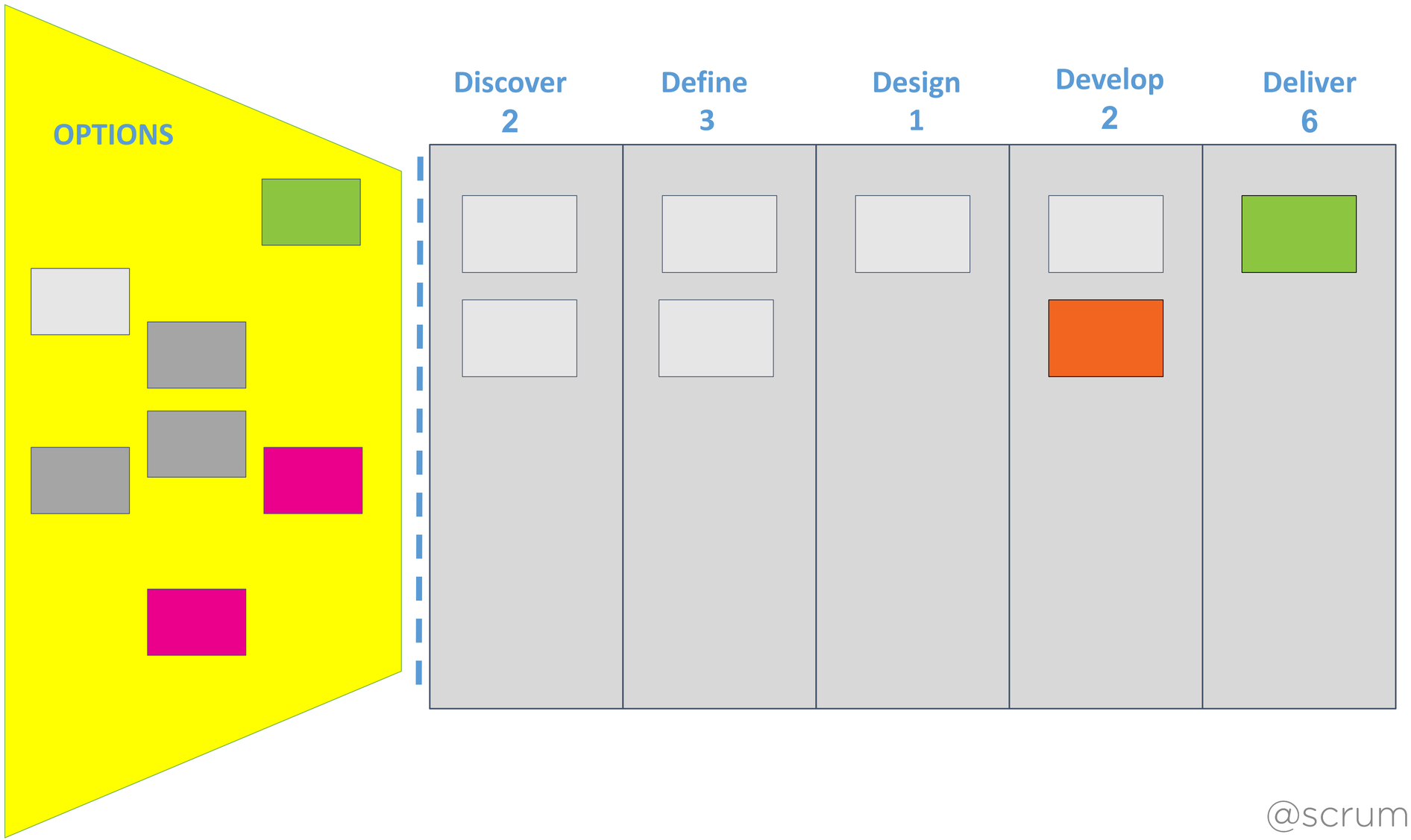
6. Transparent Priority

Understanding the impacts to changing priorities or the addition of new work.

Informed Decision Making

- See ALL of the options
- Make more informed decisions about what to work on next
- Understand the impacts of switching priorities

Make the Impact Clear



Thank you!

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