

HOW WE GOT TO KANBAN AT WINKLE

EVOLVING FROM ZERO

OUR MISSION TO MARS

- ▶ The Problem
- ▶ Winklefying Kanban
- ▶ Kanbanizing Winkle
- ▶ The Challenges
- ▶ The Success



2009

Changes

**Av. 4 wk
leadtime**

**Commission
to start
av. 2 days**

25 people

**175 Projects
/ year**

**Sales Office
US**

**Sales Office
Italy**

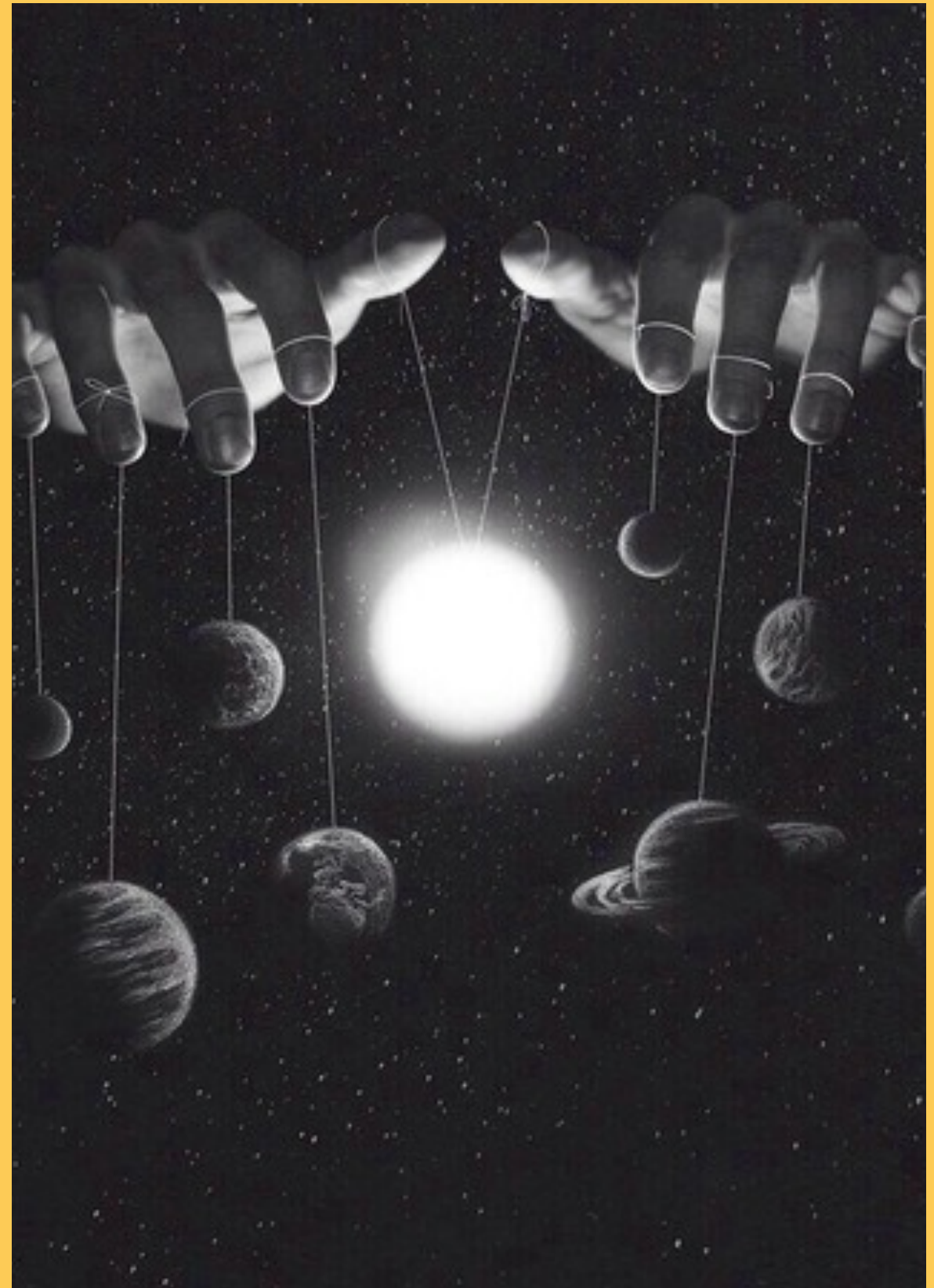
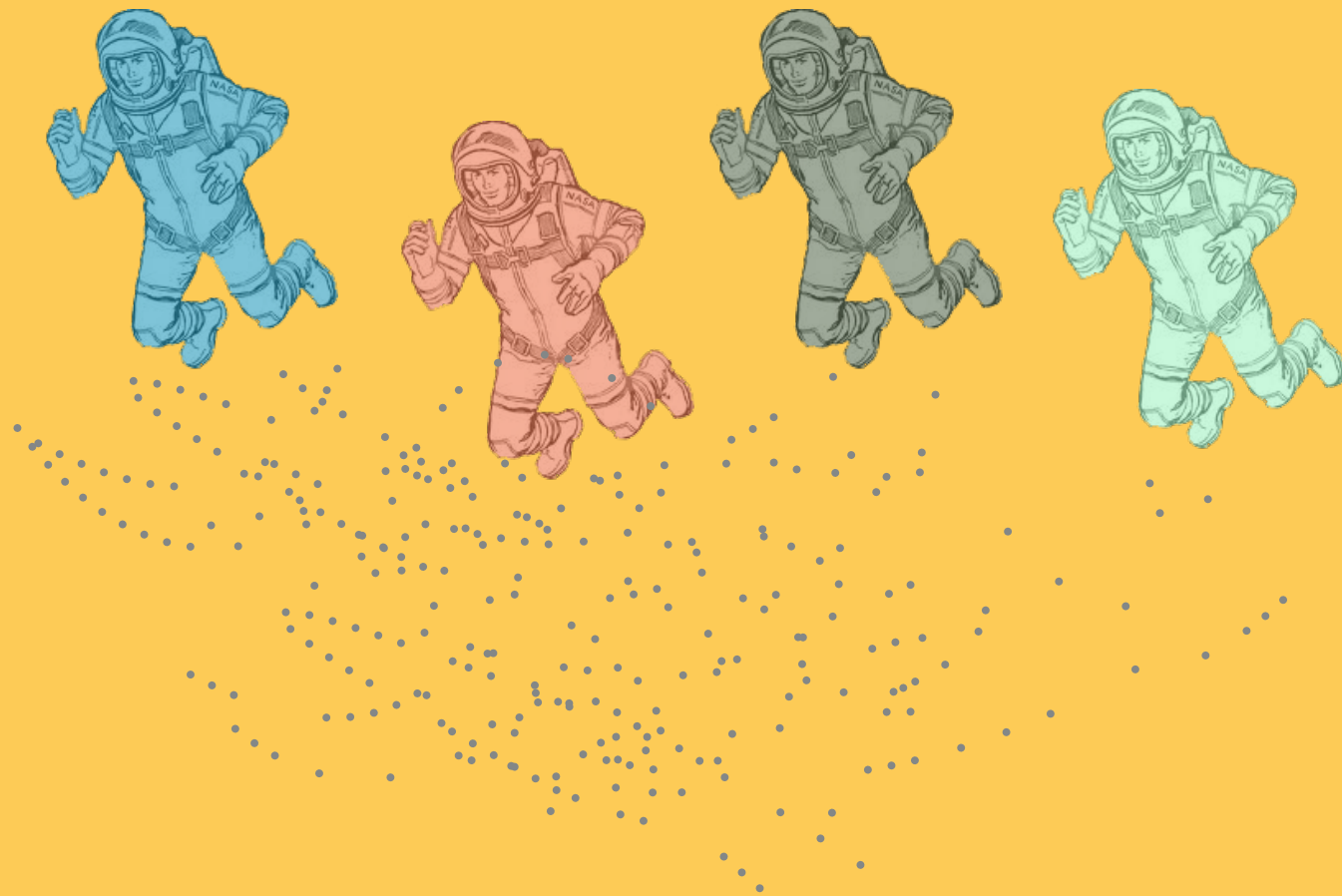
**Sales Office
UK**

**Sales Office
Amsterdam**



THE THING WITH CONTROL

Projects



**internal
projects**

**us vs.
them**

**Finance
Systems**

**Box File
Storage**

errors

**Resource
Planning**

**Project
Planning**

CRM

**Excel
sheets**

changes

Emails

Tomsplanner

Skype

IT'S NOT TOOLS...



....IT'S US

PROJECT MANAGEMENT

Basecamp

A core project management tool for tracking schedules, files and to-do lists

Pros

- Great for day-to-day project overviews
- Elegant interface
- Get a task status at a glance

Cons

- Not good for storing lots of documents
- Free version is limited

Trello

A project management service that allows you to organise anything with anyone

Pros

- Drag and drop interface
- Free to use
- Great for managing fast moving product development projects

Cons

- Not ideal for a full production calendar
- Poor for management wanting to see Gantt charts, Reports, Analytics etc.
- You need to be diligent about managing your project cards

Asana

These guys are on a mission to 'help humanity thrive by enabling all teams to work together effortlessly.'

Pros

- Cuts out email so you can work faster
- Streamlines the workflow - as they say: 'Less work, about work'
- No need for update meetings - everyone can see the latest at a glance

Cons

- Not good if you want a more in depth project management platform
- Cannot work offline
- Lacks a discussion function

FILE STORAGE

Dropbox

A multi-platform file-synchronization and sharing tool

Pros

- Simple to create folders and share with others
- Excellent range of Dropbox apps
- Allows access to earlier file versions

Cons

- Can't collaborate on files
- File location can be confusing

iCloud

An enterprise focussed desktop file sync app for Windows and Mac

Pros

- Integrates with many other services
- 5GB free storage
- Business and enterprise focussed

Cons

- So many integration options it can be confusing
- A clunky interface

Zapier

A web service to automate tedious tasks between web apps

Pros

- Supports integration of 250 apps
- Flexible pricing
- Great customer support

Cons

- Zap feature only runs every 15 minutes on free and basic plans
- Some apps require paid plans

REMEMINDERS

Due

An advanced reminders app for iOS devices

Pros

- Simple yet comprehensive interface
- Efficient sync through iCloud or Dropbox
- Quick and easy to use

Cons

- Siri dictation unnecessary for most
- You can only add reminders to single list

Checkmark 2

A reminders app for iOS devices

Pros

- Attractive flat UI design
- Location groups
- iCloud backup and sync

Cons

- Can't import iOS reminders
- No Mac support

TIME MANAGEMENT

RescueTime

A browser time meter app that sends weekly reports on where you waste your time

Pros

- Accurate awareness of your time
- Lists top distractions
- Ability to create custom reports

Cons

- Buggy depending on device
- Some screens overcomplicated

ATracker

A feature-rich time-tracking app for monitoring tasks on your phone

Pros

- Unlimited number of tasks
- Dots displayed in calendar or various chart styles
- Very well laid out

Cons

- Only for iOS

Toggl

A time management service for tracking time spent on different projects

Pros

- For mobile, web or desktop
- Fully integratable with Quickbooks & Freshbooks
- Very simple to use

Cons

- No auto stop/start feature on desktop platform
- No screenshot monitoring

2 Stand-Alone Options:

RedBooth

Formerly Teambox. A multi-platform service to increase company productivity

Pros

- Integration with Outlook & Gmail
- Gantt charts & calendars
- HD Video Conferencing

Cons

- Limited customisation
- Few report types
- Minimal advance task management capabilities

Redmine

A flexible web-based project management app

Pros

- Free to use
- Multilanguage support
- Timetracking

Cons

- Complex installation
- Not ideal for those with little Open Source knowledge

AtTask

A customisable cloud-based work management solution

Pros

- Integrates with third party programs like CRM software including Salesforce
- Customise with company Logo
- Create task templates or set recurring tasks

Cons

- No discussion area
- Complex navigation
- High pricing

3 Integrated Options:

Google Drive

An online storage locker for files and folders

Pros

- Generous free storage allowance
- Compatible with Google Docs
- Open files from 30 software types

Cons

- Requires a full Google Account
- No media streaming
- Questionable terms of service

OneDrive (now part of Office 365)

Microsoft's online backup and file sync service

Pros

- PC, Mac, iOS and Android Support
- Simple & consistent interface
- 7GB free storage

Cons

- No web streaming
- No collaborative feature
- Windows 8 desktop mode needs separate installation

iCloud (only as part of iWork)

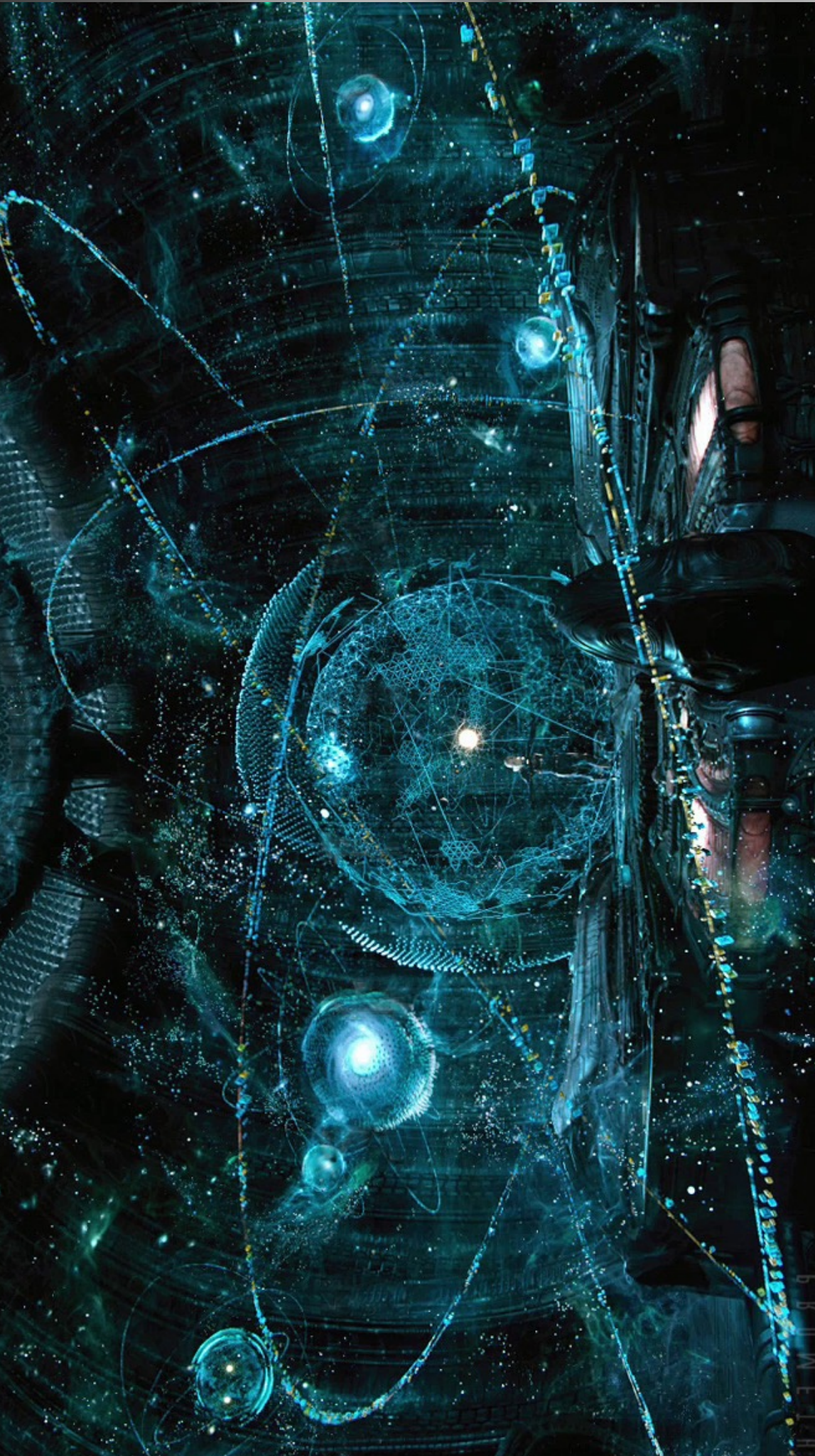
Apple's cloud based file storage service

Pros

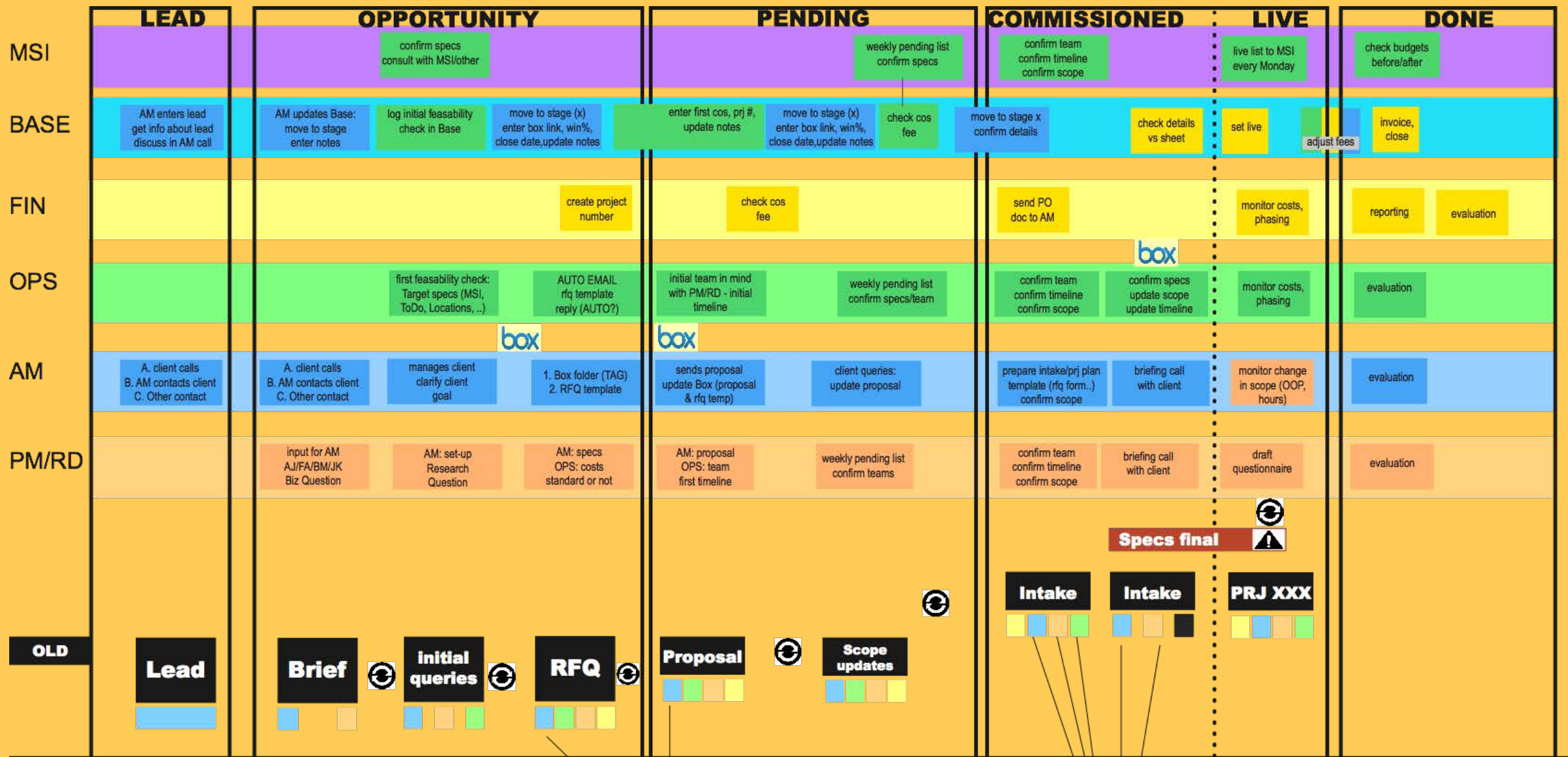
- Works on Mac, Windows PCs and iOS devices
- Automatic data backup for iOS devices
- Music backup with iTunes Match

Cons

- App centric
- Not all file types supported
- Getting started is confusing



**DON'T LET
TECHNOLOGY
DRIVE YOUR
PROCESS**



NEW Kanban/Tools Flow

The Board:
physical board at the office, including dial in
online board (later)
planning tool

Marianne & Alice & Tina

NEW RFQ Flow

Who enters/adjusts what and when
Idea: custom field with initials

Martijn & Tina

NEW PROPSAL TEMPLATE

1. Debrief
2. Business Objectives
3. Solutions Overview
4. Deliverables
5. Costs
6. Timing

Martijn & Hans

NEW INTAKE FORM = PRJ FORM

Overview Account prepare relevant details and input from client/contact.

RFQ RFQ scope template collects all details & deliverables

Comm discuss roles, responsibilities AM, PM, 2e PM, RD, client

Summary share summary with client for agreement

Brainstorm category knowledge Research question Outcome

Marianne & Tina
& RD

NEW BASE Flow

Who enters/adjusts what and when
Idea: custom field with initials

Walid & Tina

NEW EVALUATION FORM

content evaluation AM/PM
learnings for new projects

Ideas:
customer satisfaction survey
testimonials for marketing

Marianne & RD
& OPS/FIN?

1 THE LEAD

1. AM enters opportunity into **Base**
 - Adding all available information, including: brief, proposal due date, any fixed dates

2 FROM BRIEF TO PENDING (PROPOSAL PHASE)

1. AM to mention project in **stand-up**
 - AM makes **card** under briefs
2. AM creates folder on **Box**
3. AM to arrange researcher to check set-up
 - PM to make **card** in online tool
4. AM and PM prepare research set-up

RESULT: Outline of research set-up, incl. lead time

The RFQ/costs

1. AM fills out RFQ sheet (**all screeners for now**)
 - AM fills this out with/without researcher
2. AM forwards MSI specs to Rodney/Joost
 - AM adds MSI costs
3. AM uploads RFQ sheet on **Box**
4. AM sends complete RFQ to rfq@winkle to check
5. AM updates **Base** with costs, options, close date, timing, any relevant info
6. AM sends out proposal
7. AM informs in **stand-up** about pending status
 - AM moves **card** to pending
 - PM moves **card** to pending in online tool

RESULT: Pending proposal

3 FROM PENDING TO COMMISSIONED

1. AM moves deal to pending in **Base**
 - AM updates **Base** with lowest of pricing options, adds additional options in note field, adjust any relevant info
- If deals stay in pending for more than 2 weeks, AM updates **Base** notes field with latest status. If estimated close date is exceeded, AM to adjust and give new estimate
- AM to prioritize pending list bi-weekly/monthly

RESULT: Pending project with clear specs, timings and all info on Base/Box/Board

4 FROM COMMISSIONED TO DONE

1. AM to notify in stand up about commission
2. AM to send intake invite
 - Ideally same PM who worked on proposal
 - If not: people to sign up (+1 day)
3. AM to move to commissioned in **Base**
 - IMPORTANT: add which option has been commissioned and add any recent changes
4. AM to update proposal to include all recent changes

RESULT: Base is up to date (cost)

1. PM is now responsible for **card** on board and online
2. PM is now responsible for MSI (and other out of pocket costs)

The Intake

1. AM to prepare for intake: see intake form
2. PM to prepare for intake: see proposal
3. AM & PM gather all relevant info and store it
4. Info about: content, timing, costs (&hours)

RESULT: clear specs, clear timings, clear roles

Project Kick-Off

1. AM to introduce the team to client
2. PM to take over all client communication
3. PM to inform MSI (etc) about project timings
4. PM/AM to limit all changes until quaire sign off

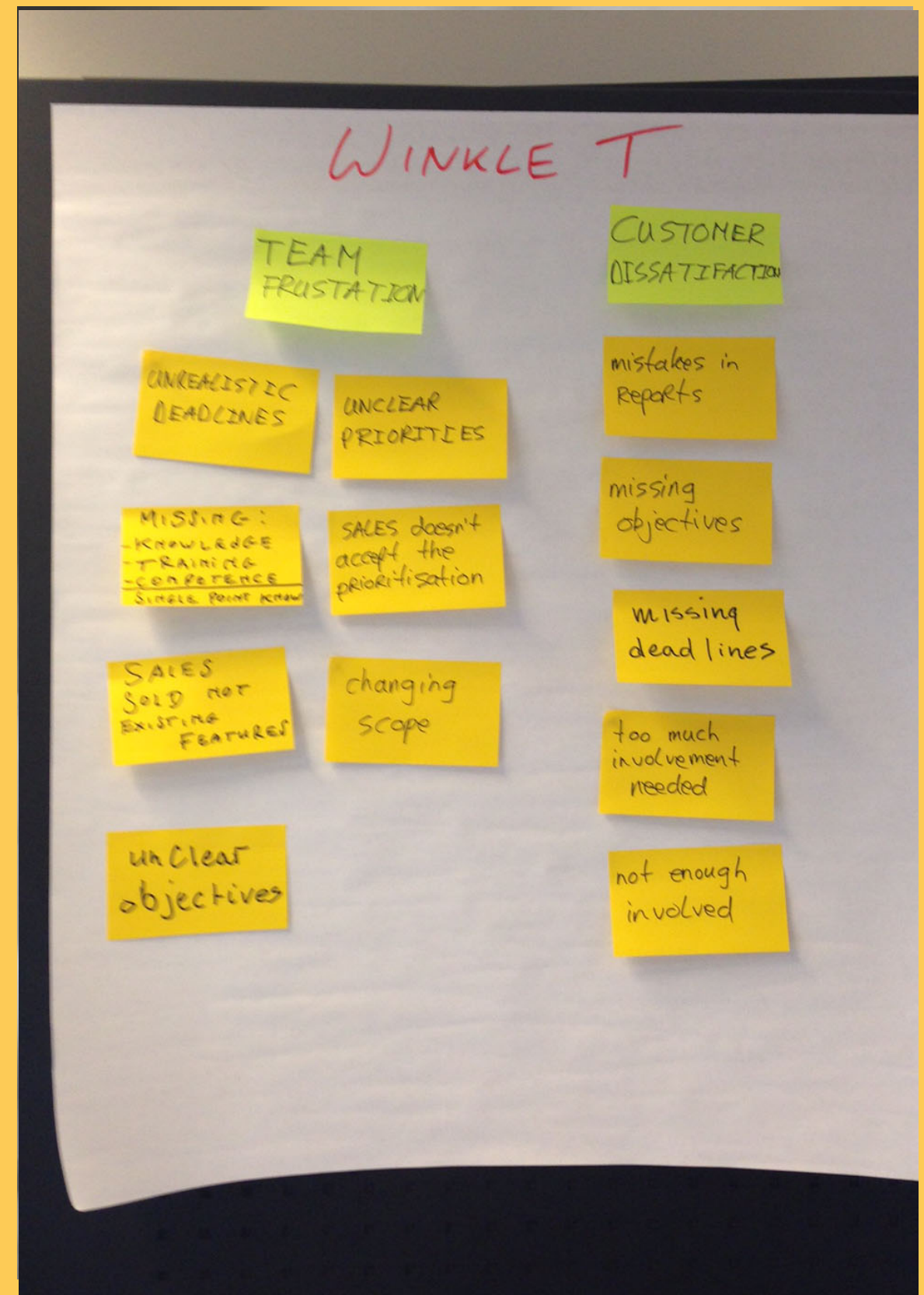
Aftercare

1. PM has delivered report
2. AM checks in with client and asks about any after-care topics
3. AM & PM arrange aftercare tasks to be done
4. AM to schedule evaluation

Evaluation

1. AM closes aftercare questions with client
2. AM does client evaluation
3. PM to join client evaluation when possible
4. PM to schedule evaluation meeting

THE TRAINING



THE FIRST STEPS

- ▶ start with what you have
- ▶ make incremental changes
- ▶ letting go



WINKLE DAY

- ▶ What is Kanban
- ▶ Why Kanban for us
- ▶ How will it help
- ▶ and btw, there is a stand-up...

THE LAUNCH
25. FEBRUARY 2015



THE FIRST WEEKS

- ▶ Students of Chaos Theory
- ▶ 1 hour stand-up
- ▶ Twice as many concerns
- ▶ Three times as many changes
- ▶ Feedback and team involvement

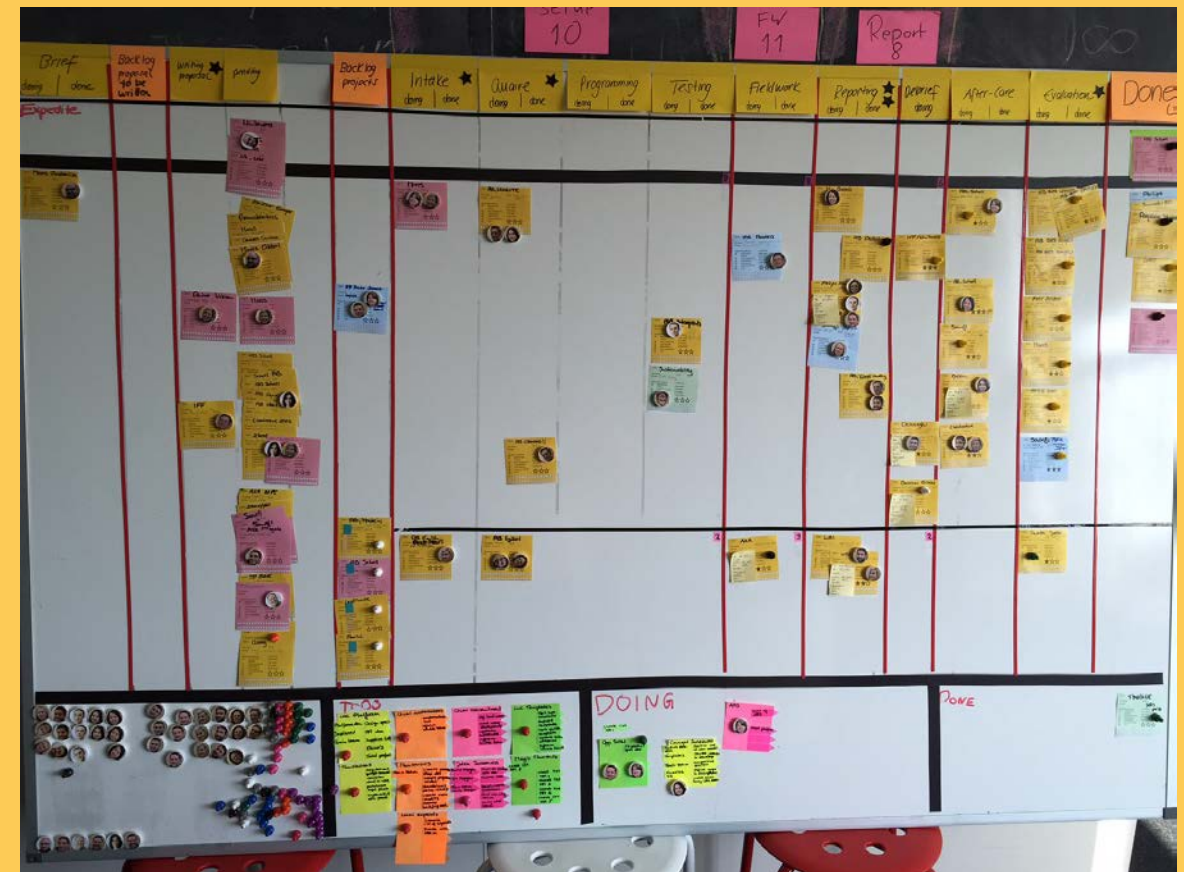


You need
chaos
in your soul
to give birth to
a dancing
star.

–Friedrich Nietzsche–

THE NEW BOARD

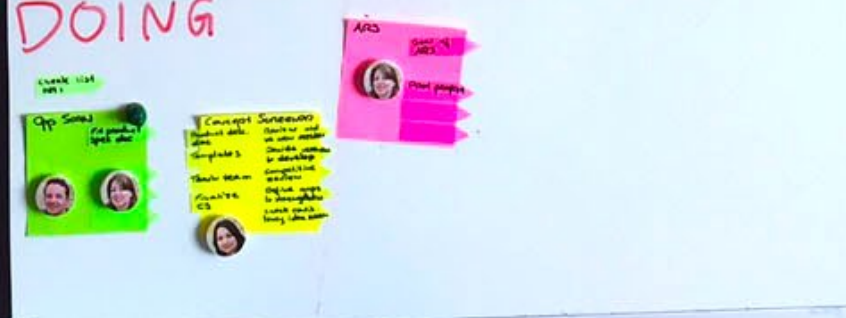
- ▶ the new set up
- ▶ new cards
- ▶ process
- ▶ having fun with it



10

FW
11

Report
8



THE CARDS

[illegible]


Client & Project: *Dettol claim*
UK & China


Scope: _____
Prj #: _____
Team: *BM, gpp*


Com date: *20/10* Fee: _____
Start date: *1/10* OOP: _____
Due date: *6/11* GM: _____
End date: *13/11* Hou: _____

Lead time: _____
Cycle time: _____

Notes: _____







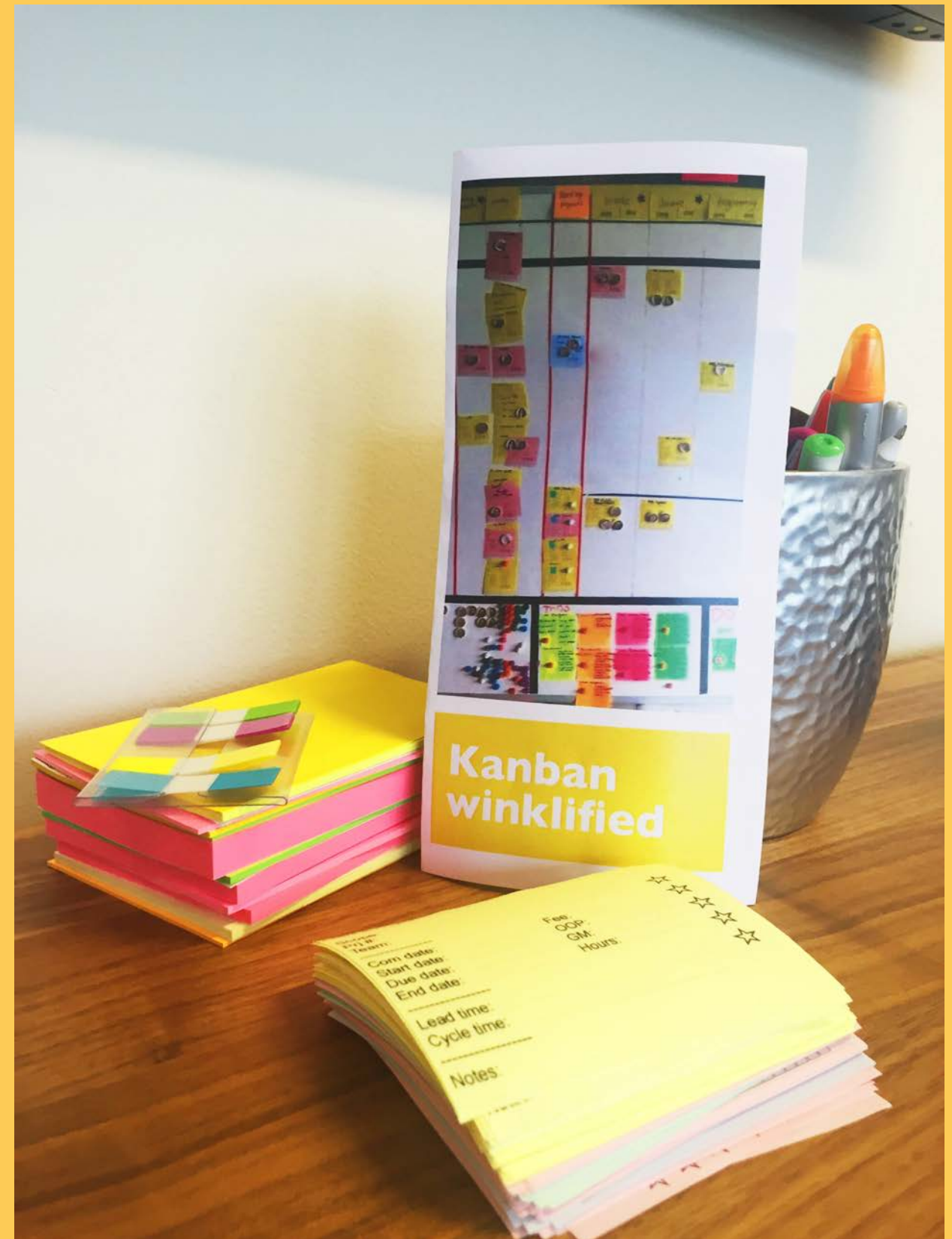
Client & Project:		Client & Project:	
Scope: _____		Scope: _____	
Prj #: _____		Prj #: _____	
Team: _____		Team: _____	
-----		-----	
Com date: _____	Fee: _____	Com date: _____	Fee: _____
Start date: _____	OOP: _____	Start date: _____	OOP: _____
Due date: _____	GM: _____	Due date: _____	GM: _____
End date: _____	Hours: _____	End date: _____	Hours: _____
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Lead time: _____		Lead time: _____	
Cycle time: _____		Cycle time: _____	
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Notes: _____		Notes: _____	

Client & Project:		Client & Project:	
Scope: _____		Scope: _____	
Prj #:	_____	Prj #:	_____
Team:	_____	Team:	_____
-----		-----	
Com date:	Fee: _____	Com date:	Fee: _____
Start date:	OOP: _____	Start date:	OOP: _____
Due date:	GM: _____	Due date:	GM: _____
End date:	Hours: _____	End date:	Hours: _____
-----		-----	
Lead time:	_____	Lead time:	_____
Cycle time:	_____	Cycle time:	_____
-----		-----	
Notes:		Notes:	

Client & Project:		Client & Project:	
Scope: _____		Scope: _____	
Prj #: _____		Prj #: _____	
Team: _____		★ Team: _____	★
Com date: _____		Com date: _____	
Fee: _____	★	Fee: _____	★
Start date: _____	★	Start date: _____	★
OOP: _____	★	OOP: _____	★
Due date: _____	★	Due date: _____	★
GM: _____	★	GM: _____	★
End date: _____	★	End date: _____	★
Hours: _____	★	Hours: _____	★
Lead time: _____		Lead time: _____	
Cycle time: _____		Cycle time: _____	
Notes: _____		Notes: _____	

THE BROCHURE

- ▶ the final agreement
- ▶ a resource for the team
- ▶ a tool for new additions
- ▶ a basis for improvement



Replenishment

The "backlog commissions" is the queue from which projects are being pulled as "committing to work on it."

Sales replenishes based on priorities.

Daily stand-ups

Team observes state of the work today and discusses strategy of the day during the standup. Before the standup magnets are arranged to reflect status quo today.

The board

Projects enter the board from the left, the replenishment session (backlog projects) and flow through subsequent stages to done. Projects are grouped by quant/qual/internal.

The cards

Representing work items (projects). Work items are being pulled from left to right. An item can only be pulled within stages under certain conditions. WIP limits indicate when an item can be pulled across stages.

User stories and classes of service

Different colours of cards represent different work items:

yellow: standard item, no hard deadline

blue: non-standard, innovative, custom

red: fixed date item with tight or cut off deadline

green: intangible, internal non-client related, other

WIP limit

Limits apply to doing&done column. There is a total team WIP limit and quant/qual specific ones (ex: 10=8 quant, 2 qual). Decide as a team which item to move first before pulling new ones.

Expedite

Items (projects) that can not wait until the next replenishment are pulled into the expedite lane. The PM working on it is dropping other work (discuss as a team.) Limit of 1

Magnets

They are avatars to represent the team. Magnet on a card means you are working on it at the moment. Once you don't do any work, take it off. Exception: Sales magnets until intake.

Additional items

blue sticker: project is on hold

pin magnets: for all cards without an avatar

some others to come

Metrics

Lead time:

elapsed time from commissioned to kick-off

Cycle time:

elapsed time from kick-off to done

Cumulative Flow Chart:

how much work is done, what is the pace of progress, backlog and where are the bottlenecks

Abbreviations/card content:

OOP: out of pocket cost = cost of sales (found in calculation)

GM: gross margin in % (found in calculation)

Cards Quant

scope-methodology, market
commission/start/end date
project fee (see Base/AM)
out o. pockets (Base/AM/Box)
gross margin in % (rfq/Box)
Stars: risk call 1-5 (Base)

Client & Project:

Scope

Pjct

Team:

Contract

Start date

End date

Lead time

Cycle time

Notes

Fee
OOP
GM
Hours
Stars

Cards Qual

containing:

see cards Quant, plus:

LUC set-up sprint

Topic posts

Client & Project:

Scope

Pjct

Team:

Contract

Start date

End date

Lead time

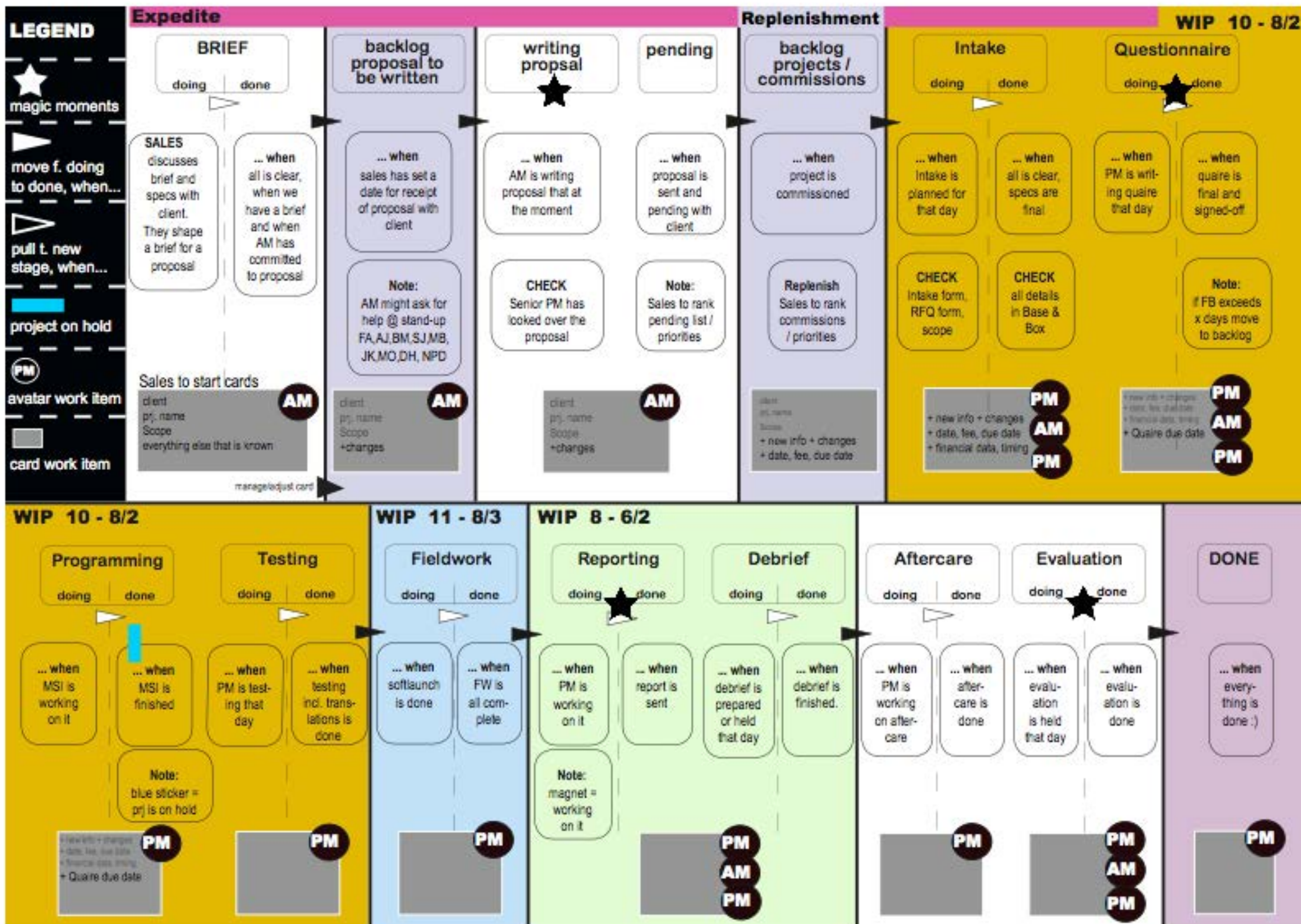
Cycle time

Notes

Contract
ROI/Box
LUC set-up
Topic posts
Fee
OOP
GM
Stars



Kanban winklified





THE VICTORY OF KANBAN

IT TAKES TIME, RIGHT?

- ▶ Implemented in 2 weeks
- ▶ Smooth process in 2 months
- ▶ Results right from the very first stand up

WITH CONTINUOUS RESISTANCE

- ▶ Team in charge
- ▶ Extra stand up added
- ▶ Replenishment

AND IT IS STILL HARD WORK TO GET USEFUL INFO OUT

- ▶ Constant up to date status of the available capacity

YOU NEED TO ADJUST TO THE PROCESS OR TOOL

- ▶ More teamwork
- ▶ Sales and research functioning like a team
- ▶ Staff joining

IT ONLY WORKS WHEN YOU STANDARDISE

- ▶ Embracing expedite projects
- ▶ Small and large projects on one board

AND IN THE END IT IS HARD TO MEASURE REAL SUCCESS

- ▶ 30 percent more utilization of our capacity!
 - ▶ Less switching time due to WIP limits
 - ▶ Less hand-overs
 - ▶ Less mistakes, less rework
- ▶ Difference between loss or profit