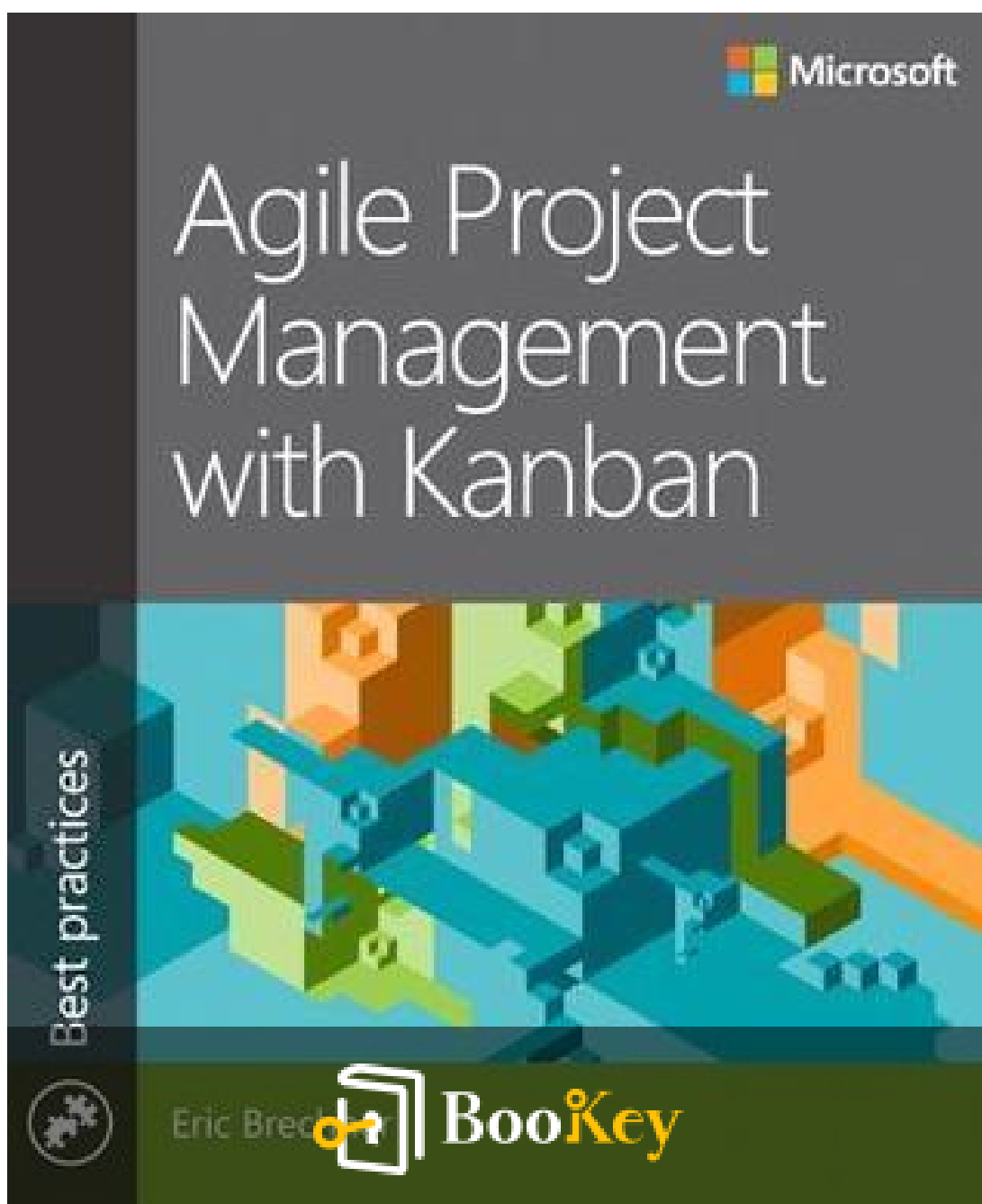


Agile Project Management With Kanban PDF (Limited Copy)

Eric Brechner



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Agile Project Management With Kanban Summary

Streamlining Workflows for Enhanced Team Collaboration and
Efficiency.

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About the book

In "Agile Project Management With Kanban," Eric Brechner unveils a transformative approach to managing projects that emphasizes flexibility, efficiency, and collaboration. This insightful guide introduces readers to the Kanban method, a visual framework that allows teams to optimize their workflow, adapt to changing demands, and enhance productivity without the stress of rigid schedules. Packed with practical examples and actionable advice, Brechner illustrates how implementing Kanban can lead to continuous improvement, greater transparency, and the swift delivery of valuable results in today's fast-paced work environments. Whether you are a seasoned project manager or new to agile methodologies, this book equips you with the tools to revolutionize your project management practice and foster a culture of innovation.

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About the author

Eric Brechner is a seasoned software development professional and a recognized expert in Agile project management methodologies, particularly in the application of Kanban principles. With a rich background that spans over two decades in the technology sector, he has held prominent roles at Microsoft and has been influential in shaping innovative practices that emphasize efficiency, flexibility, and team collaboration. Brechner is not only a practitioner but also a thought leader, frequently sharing his insights through writings and lectures, aimed at helping organizations enhance their project management processes. His work is grounded in practical experience, making complex Agile concepts accessible to teams looking to improve their workflows and delivery outcomes.

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chapter 1 Summary: Getting management consent

Chapter 1: Gaining Management Consent for Kanban Implementation

In this introductory chapter, the author advocates for the Kanban methodology as a superior technique for managing software projects. Kanban emphasizes efficiency, predictability, and simplicity in delivering value to customers compared to traditional methodologies such as Waterfall or Scrum. However, the success of such a transformational change hinges critically on securing management's consent.

The author emphasizes that employees typically follow the directives and reward systems established by management. Therefore, convincing management of the benefits and necessity of Kanban is paramount. A well-structured approach to presenting this proposal includes clearly outlining the problem, proposed solutions, associated risks with mitigations, success measures, and a plan for implementation. A sample proposal letter to management is provided to facilitate this process, encouraging teams to seek approval before moving forward with adopting Kanban.

The chapter outlines specific problems currently faced by the team, such as excessive meetings, lack of real value delivery, unaddressed quality issues, and ultimately, delayed output. Kanban is presented as a solution that

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reduces unnecessary meetings, visualizes workflows, highlights bottlenecks in real-time, and promotes accountability for work quality. While acknowledging that Kanban is not a panacea, the author suggests it can significantly improve project management, thereby resulting in timely deliveries of higher quality products at lower costs.

The chapter also discusses anticipated risks associated with transitioning to Kanban, noting that an initial drop in productivity is common but typically followed by a rebound as teams adapt. The outlined plan delineates four phases for implementing Kanban, contingent on the successful completion of prior phases to ensure engagement and track success through productivity and quality metrics.

After addressing potential management skepticism, the author highlights the importance of hands-on experience with Kanban, recommending Kanban simulations led by an experienced coach. This method helps demystify the approach for management, ensuring their confidence in its adoption.

The concluding sections provide practical steps for gaining management consent, including submitting the proposal, offering informational sessions, and setting performance baselines for continuous tracking of improvements.

In recounting personal experiences from leading Kanban initiatives within the Xbox development teams, the author shares insights into adapting

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Kanban within different organizational contexts, particularly among teams initially trained in the Waterfall method. This demonstrates Kanban's versatility and efficacy in enhancing project management practices across diverse backgrounds.

Overall, Chapter 1 serves as a guiding framework for potential change agents seeking to implement Kanban, emphasizing the importance of management buy-in as a critical first step toward successful adoption.

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Critical Thinking

Key Point: Importance of Management Consent for Implementing Change

Critical Interpretation: Imagine the power of initiating change within your own life or work. Just as the success of Kanban hinges on securing management's consent, your ability to drive personal transformation often relies on gaining the support of key stakeholders in your life—be it family, friends, or colleagues. When you present your ideas clearly, outlining the benefits and how they address existing challenges, you inspire trust and create a collaborative environment that fosters growth. This can lead to more efficient workflows, reduced obstacles, and ultimately, a more fulfilling journey toward your goals.

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chapter 2 Summary: Kanban quick-start guide

Chapter 2 Summary: Kanban Quick-Start Guide

In this chapter, the author introduces Kanban, a streamlined approach to managing workflow that enhances the delivery of high-quality value to customers while adhering to deadlines and budget constraints. Teams that are ready to adopt Kanban, armed with their work items, can follow the practical steps outlined here. For those still in the planning phase or who need to assemble their teams, Chapter 3 will cover effective project planning and team organization.

Quick-Start Steps for Kanban

1. Capture Your Team's High-Level Routine:

Teams often engage in various activities such as product discussions, bug tracking, and customer feedback management. However, Kanban focuses specifically on the intrinsic work that leads to product and infrastructure improvements. Teams should outline their existing high-level routine, simplifying complex procedures where possible. A commonly suggested workflow includes specifying, implementing, validating, and delivering work items.

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2. Redecorate Your Wall:

Once the team's routine is documented, they must visualize it on a Kanban board. This signboard facilitates real-time monitoring of work progress, using note cards to track tasks. The use of a physical board promotes engagement and fast communication among team members, fostering a sense of collective ownership. For maximum efficiency, the board should feature structured columns, including a backlog and various stages of work.

3. Set Limits on Chaos:

Limiting work in progress (WIP) is a crucial element of Kanban that manages the inherent chaos of project management. By establishing WIP limits, teams can better cope with shifting priorities and maintain a consistent flow of work. The WIP limits should be set at manageable levels based on team capacity, ensuring that no single step becomes overloaded, which could slow down the overall workflow.

4. Define "Done":

To maintain quality, teams need to establish criteria for what "done" means at the conclusion of each step. This clarity prevents misunderstandings about completed tasks and enhances accountability within the team. By

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collaboratively defining done rules, team members ensure that quality is consistently upheld throughout the development process.

5. Run Your Daily Standup:

With their Kanban system in place, teams are encouraged to conduct daily standup meetings. These brief sessions serve as an opportunity to address any blockers, review progress, and assign tasks efficiently without delving into lengthy planning sessions. The discussion typically revolves around what team members have accomplished, what they are currently working on, and where they may need help.

Troubleshooting

To facilitate effective implementation of Kanban, the chapter provides practical troubleshooting advice for common challenges. These include strategies for handling situations where a work step reaches its WIP limit, identifying and managing blocked items, and ensuring that team members remain aligned in their efforts.

Conclusion

The chapter concludes with a checklist to guide teams in their Kanban implementation, emphasizing the importance of visualizing workflow,

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setting appropriate limits, defining quality criteria, and maintaining agile communication practices. Kanban's adaptability and emphasis on efficiency make it a beneficial framework for teams looking to maximize their potential and deliver value consistently.

This quick-start guide serves as a foundation for teams eager to adopt Kanban and improve their workflow, setting the stage for deeper exploration of advanced concepts in the subsequent chapters.

Section	Summary
Introduction	Kanban is introduced as a method for managing workflow efficiently, aimed at delivering high-quality value while respecting deadlines and budgets.
Quick-Start Steps	The chapter outlines practical steps for teams ready to implement Kanban:
1. Capture Team's Routine	Teams should document their high-level routines focusing on intrinsic work that improves products and infrastructure.
2. Redeck Your Wall	Visualize the routine on a Kanban board to facilitate monitoring progress and enhancing communication among team members.
3. Set Limits on Chaos	Establish work-in-progress (WIP) limits to manage chaos and maintain a steady flow of work based on team capacity.
4. Define "Done"	Collaboratively establish clear criteria for what "done" means at every step to ensure quality and accountability.
5. Run Daily Standup	Conduct daily standup meetings to discuss progress and blockers without lengthy planning sessions.
Troubleshooting	Provides practical advice for addressing common challenges in

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Section	Summary
	Kanban implementation, including handling WIP limits and keeping team alignment.
Conclusion	A checklist is provided for successful Kanban implementation, highlighting visualization, limit setting, quality criteria, and communication. Kanban serves as a foundational framework for teams to enhance their workflows and consistently deliver value.

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Critical Thinking

Key Point: Set Limits on Chaos

Critical Interpretation: Imagine transforming your daily life by embracing the principle of limiting chaos. Just as Kanban encourages teams to set limits on work in progress, you can apply this wisdom by prioritizing tasks and avoiding overwhelm. Picture your day: instead of juggling too many responsibilities, you focus on what truly matters, allowing yourself to devote energy to fewer, more meaningful activities. This not only enhances your productivity but also reduces stress, fostering a clearer mindset. By defining your own limits and understanding your capacity, you create space for creativity and growth, transforming the way you approach your personal and professional goals.

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chapter 3 Summary: Hitting deadlines

Chapter 3: Hitting Deadlines

In this chapter, the focus is on deploying the Kanban methodology to efficiently deliver value to customers while achieving accurate project timelines and resource allocation. Kanban, which relies on limiting Work in Progress (WIP), creates predictability that enhances quality, agility, and customer satisfaction. By controlling WIP, teams can streamline processes and quickly respond to changes, ultimately shortening their cycle times—this refers to the time taken for a work item to move from specification to validation.

The chapter outlines several crucial steps for successful project planning and team staffing, broken down as follows:

1. Populate Your Backlog

Backlogs can be filled easily if the feature team (a small group of 3-10 people) relies on existing features determined by stakeholders. Each feature, improvement, or task should be put on its note card and placed in the Backlog column on a Kanban board. If the team manages its own backlog, they'll need to gather input from customers and leadership on potential

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improvements. Items should be categorized based on their origins—usage metrics, feedback, leadership ideas, etc.—to facilitate later prioritization.

2. Establish Your Minimum Viable Product (MVP)

An MVP consists of the essential items that must be completed before a product can be released. It typically represents a small percentage of the overall backlog, including core functionalities and features that differentiate the product. Accurately defining the MVP is crucial because it ensures critical functionalities are ready and prevents the team from postponing integral components until later stages.

3. Order Work, Including Technical Debt

With a prioritized backlog, including improvements and technical debt (outstanding bugs, outdated code, and tools that need upgrading), the team will determine the execution order of tasks. Teams should focus on getting higher priority items started quickly, while lower priority tasks are left in their respective piles.

4. Estimate Features and Tasks

Estimating the duration of work items is vital for setting the right expectations with leadership and partners. Estimations use techniques like

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the Wideband Delphi method or planning poker, helping to reach a consensus on how many smaller-sized tasks are needed. Tracking the team's task completion rate over time will assist in refining estimates further.

5. Track Expected Completion Dates

To keep stakeholders informed, the chapter discusses how to dynamically adjust estimates based on the current task completion rate (TCR) and the addition of new tasks (task add rate, TAR). By calculating expected completion dates using pending tasks and updates from the Kanban board, teams can provide realistic timelines.

6. Right-Size Your Team

Finally, based on the calculated expected completion date, the chapter details how leadership can right-size the development team. This involves understanding that increasing team size does not linearly correlate with productivity due to communication overhead. Basic and advanced approaches are given for refining team size estimates, considering current team effectiveness and task resolution rates.

In conclusion, the chapter emphasizes the importance of these structured steps within the Kanban framework to achieve timely delivery of value to customers, while also managing team dynamics effectively. The process

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encourages teams to continuously improve their efficiency through real-time feedback and adjustments, ultimately enhancing predictability in project management.

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chapter 4: Adapting from Waterfall

Chapter 4: Adapting from Waterfall

In this chapter, the focus shifts to teams entrenched in the traditional Waterfall product development methodology, guiding them to adapt to the more flexible Kanban system. Waterfall, characterized by its sequential phases—specifying requirements, implementing features, and validating them—often leads to long timelines and significant challenges when unexpected changes arise. Teams using Waterfall are accustomed to in-depth planning, but this rigidity can hamper agility and responsiveness to market shifts.

Kanban, in contrast, is designed for smooth and continuous delivery, enhancing productivity, quality, and adaptability. The chapter outlines a pragmatic approach to transitioning from Waterfall to Kanban with minimal disruption, explaining that the familiar roles and methods from Waterfall can largely remain in place during this adaptation process, gradually shifting toward a more agile workflow.

Introducing Kanban to a Waterfall Team

Traditional Waterfall teams generally possess a wealth of experience, having

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developed successful products through established practices. However, evolving market demands are pushing these teams to adopt more agile approaches. To facilitate this transition, it is essential to communicate the rationale for adopting Kanban, leveraging team members' prior knowledge while gently introducing new practices. Initial adaptations should feel familiar, allowing teams to quickly acclimate to Kanban without overhauling their entire workflow.

An example of the transition includes daily standup meetings to discuss project progress and handle obstacles collaboratively. This adjustment allows team members to maintain their productivity while clearly visualizing their tasks and priorities on a Kanban board.

Working in Feature Teams

Kanban encourages daily collaboration among feature teams—multidisciplinary groups dedicated to developing specific product features. While teams traditionally operate within their silos, Kanban promotes cross-discipline interaction during these meetings. By focusing on shared goals, team members can align their efforts, make quick adjustments, and solve issues together.

Completing Features Before Starting New Ones

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One of the key aspects of Kanban is the emphasis on working in small batches. Unlike Waterfall's bulk-processing style, Kanban encourages teams to complete a feature before moving on to the next one. This practice significantly reduces time lags between specification, implementation, and validation stages, allowing for quicker adjustments based on immediate feedback from customers. Traditional practices of extensive specification documentation can be adapted to utilize informal notes and collaborative discussion, reducing the overhead typically associated with Waterfall methodologies.

Dealing with Specs and Bugs

The chapter outlines a more effective approach to managing specs and bugs within Kanban. By completing features more rapidly, teams decrease the time between defining specifications and validating them. While Waterfall often results in high bug counts post-implementation, Kanban's continuous feedback loop enables teams to identify and address issues promptly. The validation process is integrated into the workflow at shorter intervals, ensuring any problems are resolved quickly.

Engaging with Customers

In a traditional Waterfall environment, interaction with customers is relatively infrequent, often limited to milestones or final release phases.

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With Kanban, teams can engage with customers more continuously, integrating their feedback at various stages of product development. This leads to enhanced satisfaction as companies are able to respond to customer needs in a timely manner.

Celebrating Performance Improvements

Monitoring progress is crucial for the transition. By measuring metrics such as completed tasks and unresolved bugs, teams can demonstrate the effectiveness of their new Kanban practices, which should lead to improved productivity and quality over time. Celebrating these wins boosts morale and reinforces commitment to the new system.

Rude Q&A

In addressing potential concerns and questions from team members about adopting Kanban, the chapter includes a Q&A section that tackles common worries surrounding role changes, the introduction of new processes, and the perceived burden of increased interaction and workflow management. Responses highlight that the team remains in control while making improvements to their work environment.

Checklist

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A checklist at the end summarizes key actions for teams to transition from Waterfall to Kanban effectively, emphasizing reassurances for team members, the establishment of daily standups, and the importance of customers' feedback.

This well-structured chapter serves as a comprehensive guide for Waterfall teams aiming to transition to Kanban, emphasizing gradual adaptation, maintaining core functionalities, and celebrating improvements, ultimately enhancing productivity and responsiveness in product development.

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chapter 5 Summary: Evolving from Scrum

Chapter 5: Evolving from Scrum

In this chapter, the author provides guidance for teams transitioning from Scrum, a popular agile framework, to Kanban, an evolution of agile project management aimed at optimizing flow and productivity. For those currently using Scrum, this chapter offers insights on making the switch smoothly. If you are unfamiliar with Scrum, it is advisable to familiarize yourself with it, as it serves as the foundation for understanding this transition.

The chapter begins with the author's personal journey, contrasting the traditional Waterfall method with Scrum. The author emphasizes the significant improvements brought by Scrum, such as iterative development, empowerment of teams, and closer customer engagement. However, after discovering Kanban through Corey Ladas and David Anderson, the author found Kanban to be an even more effective method, allowing for a seamless flow of work without the constraints of time-boxed sprints.

To facilitate the transition, the author outlines key concepts that shift from Scrum to Kanban, such as roles, workflow events, and the importance of continuous feedback. While Kanban allows for roles like Scrum Master and Product Owner, it encourages a more fluid team dynamic where

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responsibilities can be shared rather than strictly delineated as in Scrum.

Introducing Kanban to a Scrum Team

The transition begins by acknowledging the benefits of Scrum while introducing Kanban as an enhancement of Scrum's agile principles. The author suggests introducing Kanban gradually, framing it as an iterative step to improve existing processes rather than a complete overhaul. By removing time constraints associated with sprints, teams can respond to customer feedback and process improvements more dynamically.

Team members who are accustomed to Scrum may initially resist changes. However, they should be reassured that these adjustments are designed to improve workflow and maintain the roles they are familiar with. Kanban emphasizes clarity in task management through visual representations, such as a Kanban board, where each card represents a work item that flows through different stages: Specify, Implement, and Validate.

Mapping Roles and Terms

One key concern for teams evolving to Kanban is the role mapping from Scrum. The author explains that the positions of Scrum Master and Product Owner can be retained, or their responsibilities can be spread among the team, fostering a more collaborative environment. With the shift, the entire

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team becomes responsible for overcoming obstacles to maintain a steady flow of customer value, highlighting the importance of collective engagement with customers.

In Kanban, the flow is characterized by specific done rules for each stage, ensuring consistent delivery of high-quality output. This transparency allows team members to supervise progress, identify blockers, and work collaboratively to resolve issues.

Evolving the Events

The traditional events found in Scrum, such as Sprint Planning, Reviews, and Retrospectives, are transformed in Kanban. While daily standups remain a crucial rhythm in both methodologies, Kanban forgoes many of Scrum's formal meetings in favor of real-time workflow management and continuous delivery of product increments. This allows feedback from customers to be integrated promptly, improving the responsiveness of the team.

Key to this transition is the continued assessment of team performance. The author stresses the importance of measuring productivity and quality through metrics such as completed tasks and unresolved bugs, which directly relate to the team's agility. Regular reporting on these improvements helps build commitment and morale among the team and management.

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Celebrating Performance Improvements

As teams adopt Kanban, it's essential to communicate successes, even incremental ones. The chapter emphasizes documenting performance improvements in productivity and quality, visually demonstrating the benefits of transitioning from Scrum to Kanban. This not only reassures team members but also helps maintain motivation throughout the transitional phase.

Rude Q&A

To address potential concerns, a "Rude Q&A" section is included, anticipating common questions from team members. This section provides straightforward answers to questions about remaining agile, the loss of structure with Kanban, the continuity of customer feedback, the need for ongoing improvements, and the flexibility of roles within the team. The responses highlight that Kanban allows teams to manage their workflow efficiently while maintaining a customer-centered approach.

Checklist for Evolving from Scrum

The chapter concludes with a practical checklist to facilitate the transition from Scrum to Kanban. This includes clarifying the benefits of evolving to Kanban, detailing the adjustments in roles and events, promoting continuous

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improvement, measuring relevant productivity metrics, and celebrating achievements to reinforce team spirit and confidence.

In summary, the chapter provides a comprehensive framework for Scrum teams to evolve into Kanban, emphasizing the benefits of enhanced agility, improved workflow, and continuous customer engagement, while being mindful of team dynamics and responsibilities.

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Critical Thinking

Key Point: Emphasis on Continuous Feedback

Critical Interpretation: Imagine a work environment where feedback is not just a scheduled event, but a constant conversation—this is the heart of Kanban. By embracing the principle of continuous feedback, you can enhance personal growth and adaptability in your life. Just as Kanban encourages teams to respond to customer needs dynamically, you can learn to adapt more readily to life's changing circumstances and the feedback you receive from experiences. This ongoing dialogue with yourself and your surroundings fosters resilience and a growth mindset, inspiring you to make meaningful adjustments rather than waiting for the 'perfect moment' to act.

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chapter 6 Summary:

Deploying components, apps, and services

Chapter 6: Deploying Components, Apps, and Services

In this chapter, we focus on the deployment of completed work from the right side of a Kanban board, building on the previous chapter's insights about managing the backlog. The deployment process is critical as it ensures a smooth workflow, allowing teams to continuously deliver value to customers. The core idea here is that just as an organized backlog promotes efficient workflow, a structured deployment approach enhances the delivery of features and services.

The chapter outlines four primary deployment models utilized by feature teams:

- 1. Integrate Code into the Main Line:** Commonly applied in large projects with centralized version control systems, teams regularly merge code from various development branches into the main branch, ensuring unified progress.
- 2. Submit Pull Requests:** Frequently used in the context of open-source software (OSS), code changes are pushed to repositories (like GitHub) and reviewed before integration.

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3. **Publish to Online Stores:** For apps and digital media, completed work is published to online catalogs, such as Google Play, to reach customers effectively.

4. **Propagate Code to Servers:** Often adopted for web services or SaaS, where components are deployed directly onto web servers or virtual machines.

Each of these deployment models requires tracking completed items and understanding how the Kanban framework influences deployment rhythms and customer feedback cycles.

Continuous Integration

Continuous Integration (CI) is a software development practice aimed at facilitating the consistent integration of high-quality code into a mainline branch. CI allows teams to automatically build and test code changes, ensuring that new code can be integrated multiple times a day without issues. For smaller projects, the integration process is straightforward, while larger projects necessitate careful management to avoid conflicts between merging teams.

To mitigate potential conflicts, teams can adopt a **Forward and Reverse Integration** strategy, where they regularly pull the latest code from the main branch into their development environment, resolve any conflicts, and

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subsequently merge their changes back into the main branch in a controlled manner. This strategy helps maintain stability and allows teams to coordinate better when multiple branches are involved.

To enhance transparency, the chapter suggests dividing the "Done" section of the Kanban board into sub-sections dedicated to tracking reverse integrations, special FastTrack items, and completed work. This way, stakeholders can readily see the status of their requests.

Continuous Push

The chapter also delves into **Continuous Push**, which relates CI principles to distributed version control systems like Git. Using this model, individual developers can work in isolated environments and push changes to a central repository, which is often hosted on platforms like GitHub. The approach emphasizes managing merge conflicts effectively, similar to CI strategies, but it benefits from the controlled flow of changes inherent to distributed systems.

To organize this process, Kanban can be employed to track pull requests and ensure that work items remain visible until accepted and integrated into the upstream repository. A dedicated “FastTrack” section for urgent items can expedite the deployment of critical updates, enhancing the team's responsiveness to stakeholders.

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Continuous Publishing

Originating in the early 2000s, **Continuous Publishing** allows for dynamic content release strategies where updates are made available as soon as they are ready, rather than waiting for a pre-set deadline. Kanban proves to be an effective tool for managing this workflow by allowing teams to track different states of publishing—Pending, Submitted, and Deployed.

In contexts like Xbox, where daily updates and new content are critical, maintaining such an agile publishing system involves managing diverse content types and audience access. The chapter discusses the intricacies and synchronization challenges present when developing apps alongside operating system updates, emphasizing the need for careful coordination between teams.

Continuous Deployment

Continuous Deployment arose from web companies striving for rapid productivity and customer feedback. This model involves automatically deploying code changes directly to production, significantly reducing the turnaround time for delivering features to customers. It relies heavily on monitoring to catch and mitigate any potential issues quickly, with rollback options available should problems arise post-deployment.

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The chapter also underscores the need for effective audience control, allowing teams to release new features initially to a limited audience to address any unforeseen issues before broader availability. Such deployment strategies minimize the necessity of maintaining extensive preproduction environments, which are costly and often do not reflect real-world conditions accurately.

Conclusion and Checklist

In conclusion, Chapter 6 emphasizes the value of deploying components, apps, and services through a structured approach using Kanban. A checklist is provided at the end, summarizing key actions for each continuous model—ensuring that teams can effectively manage integration, push changes, publish content, and deploy services, thereby enhancing their productivity and responsiveness to customer needs.

By integrating concepts from CI, Continuous Push, Continuous Publishing, and Continuous Deployment, teams at organizations like Xbox have transformed their workflows, rendering deployment an efficient and reliable process that caters to the demands of a fast-paced, customer-centric environment.

Section	Summary
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Section	Summary
Deployment Overview	Focus on deploying completed work using structured approaches that enhance delivery and customer value.
Deployment Models	<p data-bbox="400 443 1426 517">Integrate Code into the Main Line: Regular merging of code in large projects.</p> <p data-bbox="400 551 1315 624">Submit Pull Requests: Code changes reviewed before integration, commonly in OSS.</p> <p data-bbox="400 658 1378 732">Publish to Online Stores: Apps and media are published to platforms like Google Play.</p> <p data-bbox="400 766 1410 840">Propagate Code to Servers: Direct deployment to servers for web services or SaaS.</p>
Continuous Integration (CI)	Facilitates consistent integration of quality code; strategies for managing merge conflicts include Forward and Reverse Integration.
Continuous Push	Emphasizes isolated development and controlled changes in distributed systems with Kanban supporting pull requests visibility.
Continuous Publishing	Dynamically releases updates as they are ready; employs Kanban to manage publishing states like Pending and Deployed.
Continuous Deployment	Automatically deploys code to production; relies on monitoring and audience control for effective rollout and feedback.
Conclusion	Reiterates the importance of structured deployment models using Kanban to transform workflows for better productivity and responsiveness.



chapter 7 Summary: Using Kanban within large organizations

Chapter 7 Summary: Using Kanban within Large Organizations

This chapter focuses on the challenges and strategies for implementing Kanban in large organizations, where project coordination involves multiple teams and complex dependencies. It is not aimed at smaller, independent projects. Instead, it provides insights tailored for teams working within extensive organizational structures, emphasizing the need for structured management as they navigate diverse methodologies and varying quality standards.

Understanding the Organizational Landscape

In large organizations, different teams might employ various project management methodologies like Scrum, Waterfall, or Kanban itself. This variety can create challenges in coordination as teams may have differing expectations for quality and delivery timelines. To ensure success, teams must align their backlogs with the overarching project goals, manage dependencies, and effectively communicate status, all while maintaining productivity during project milestones or stabilization periods.

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Key Areas of Focus

- 1. Deriving a Backlog from Big Upfront Planning:** A successful project relies on a high-level vision, architecture, and schedule that guides the overall direction. However, it's crucial to balance planning; too much can lead to wastefulness, while too little can cause chaos. Teams should utilize the high-level vision to derive specific tasks for their backlogs based on how their work contributes to the broader goals.
- 2. Ordering Work Based on Dependencies:** Each team's work must consider its dependencies on other teams. This requires careful coordination to avoid disruptions from late or unstable deliverables. Various approaches can be employed to effectively order work: automated methods using tools, intensive manual work through meetings, or socially driven discussions that foster communication among teams.
- 3. Fitting into Milestones:** Teams must plan how they can fit their deliverables within project milestones. Estimating completion dates for work items involves computing task completion rates and using these metrics to schedule deliverables that align with the larger project timeline.
- 4. Communicating Status Up and Out:** Regular updates on work item

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statuses to stakeholders are essential. This helps ensure everyone is aware of progress and any potential delays. Teams can efficiently sync updates with the project's online tracking system, minimizing additional workload.

5. Handling Late or Unstable Dependencies: Teams will inevitably face dependencies that are either late or do not meet quality standards. Strategies like creating mock implementations (fakes or shims) can temporarily bridge gaps. Proactively managing and communicating about these issues with partner teams is critical to maintain momentum and collaboration.

6. Staying Productive During Stabilization: In the final stages of large projects, stabilization involves fixing bugs and validating systems. Teams can still be productive by engaging in activities such as addressing technical debt, prototyping new ideas, or improving tools and infrastructure while also supporting partner teams in stabilization efforts.

Checklist for Effective Kanban Implementation

- Understand the organization's high-level vision and architecture.
- Establish how your team will contribute to this vision and architecture.
- Maintain a clear understanding of the team's Minimum Viable Product (MVP) within the broader context.
- Organize work in a way that accommodates dependencies with partner

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teams.

- Fit deliverables into project milestones effectively, keeping communication transparent regarding progress.
- Define and document common terms like “complete” and “done” with peer teams to avoid misunderstandings.
- Prepare for and address late or unstable dependencies proactively.
- Plan constructive activities during project stabilization to maintain team engagement and productivity.

By adhering to these strategies and frameworks, teams can navigate the complexities of large-scale projects, ensuring that they deliver value while aligning with the broader objectives of their organization.

Section	Summary
Chapter Title	Using Kanban within Large Organizations
Focus	Challenges and strategies for Kanban implementation in large organizations with multiple teams and complex dependencies.
Key Topics	Considerations for various project management methodologies, communication, and productive work environments.
1. Backlog Development	Balance high-level vision and planning to derive specific task backlogs.
2. Ordering Work	Coordinate dependencies to avoid disruptions using automated, manual, or social approaches.
3. Milestone Integration	Align deliverables with project milestones based on task completion metrics.

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Section	Summary
4. Status Communication	Regularly update stakeholders on work item statuses via online tracking systems.
5. Dependency Management	Use mock implementations to manage late or unstable dependencies proactively.
6. Productivity During Stabilization	Engage in constructive activities like addressing technical debt while stabilizing projects.
Checklist for Implementation	Align with organizational vision, manage dependencies, maintain clear definitions, and plan for stabilization activities actively.

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chapter 8: Sustained engineering

Chapter 8 Summary: Sustained Engineering

In the realm of software development, teams inevitably face the challenge of maintaining and fixing issues after a product is released—this critical maintenance phase is known as "sustained engineering" (SE). Despite the goal of minimizing defects during development, unplanned maintenance requires effective prioritization and scheduling alongside regular feature development. James Waletzky introduces Kanban as a structured model to manage SE processes effectively.

Defining the Framework for Sustained Engineering

Waletzky begins the chapter by clarifying essential terms, challenges, and roles within the SE process:

1. Common Vocabulary.

- Establishing consistent terminology across support, development, and engineering teams is crucial for communication. Common terms include "escalation" for serious issues requiring immediate attention and "incident" for reported problems.

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2. Challenges and Goals:

- Engineering teams face delays in resolving customer issues due to competing priorities and a lack of visibility across team functions. Kanban aims to tackle these challenges by streamlining processes.

- Goals include minimizing distractions, fixing the right issues efficiently, improving team collaboration, and measuring effectiveness through KPIs.

Stakeholders and Team Dynamics

Three core roles form the backbone of SE:

- **Customer Support:** Primary interface with customers, manages reported issues.
- **Product Management:** Owns the product roadmap and prioritizes tasks for the engineering team.
- **Core Engineering Team:** Cross-functional group responsible for addressing bugs and maintaining product integrity.

Deciding on ownership models for SE can vary widely:

- A **dedicated SE team**, focused solely on resolving post-release issues, allows core engineers to concentrate on new features but may lack motivation.



- Appointing a **dedicated SE person** within the core engineering team fosters direct communication but might lead to the dilution of responsibilities.
- Having the **core engineering team** directly handle incoming escalations can create accountability, although it risks distracting them from ongoing developments.

Structuring Support Tiers

Waletzky outlines a three-tier support system beneficial for medium to large organizations:

- **Tier 1:** Frontline support handles simple issues directly with customers.
- **Tier 2:** Engages in deeper problem-solving for more complex issues.
- **Tier 3:** Involves the core engineering team for high-impact escalations.

This tiered approach minimizes distractions from the engineering team by filtering out minor issues before they reach critical engineering resources.

Collaboration Techniques

The chapter emphasizes the need for effective collaboration among teams,

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introducing structured techniques such as:

- **Triage Meetings:** These are critical assessments of escalating issues, ensuring that the most serious problems are prioritized and addressed first, similar to a medical triage system that prioritizes patient treatment based on urgency.
- **Quick-Solve Meetings:** Aimed at resolving minor escalations quickly, these swift discussions help clear the queue for potential escalations that don't require code changes, preventing backlog.

Implementing the Kanban Workflow

A robust Kanban implementation is essential for managing SE effectively:

- A specific Kanban board visualizes the workflow, ranking escalations in one section and bugs in another, ensuring clear separation and prioritization.
- Defined "done" rules clarify when an item can be moved through the workflow, enhancing accountability and reducing ambiguity.

Tools and Troubleshooting

Waletzky stresses utilizing tools that enhance visibility and streamline processes, recommending the integration of customer support systems with engineering tracking to maintain clarity on issue resolution.

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Common problems associated with Kanban implementation for SE include issues like overwhelming escalations, low team morale, and visibility challenges. Waletzky suggests practices such as regular retrospectives and continuous improvement initiatives (kaizen) to address these issues and

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chapter 9 Summary: Further resources and beyond

Chapter 9: Further Resources and Beyond

In previous chapters, you were introduced to the Kanban methodology, highlighting its adaptability from traditional Waterfall frameworks and its evolution from Scrum practices. Kanban excels in facilitating continuous integration and deployment of services and applications, making it suitable for a broad range of team sizes and organizational structures, including larger projects and sustained engineering efforts.

Though you now have a fundamental understanding of Kanban, you likely have questions: Can Kanban be applied universally? What practices align with or diverge from Kanban? Why is the Kanban approach effective? And how can you enhance your methods beyond Kanban? This chapter seeks to expand your knowledge of Kanban and offer pathways for transcending its framework to foster improvement in your business and personal endeavors.

Expanding Kanban to New Areas

Kanban can be employed for various activities, both in business and personal life, as long as there's a clear beginning and end to the work involved. It can be scaled to accommodate numerous team members, making it ideal for collaboration in large groups—up to around 100

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participants—through a physical or virtual signboard. Scaling Kanban requires careful management to avoid overwhelming the workflow, necessitating team subdivisions as complexity increases.

Incorporating "swim lanes," or separate pathways for different types of tasks (e.g., escalations vs. bugs), enhances the visibility and management of diverse work items, which is crucial for larger teams.

Personal Kanban

For personal initiatives such as home projects or school assignments—activities that have defined start and end points—Personal Kanban can provide structure and focus. Utilizing a simple signboard with a backlog and a "Doing" column, individuals can track progress while adhering to a personally set WIP (Work In Progress) limit to maintain focus. The satisfaction of moving completed tasks to a "Done" column aids in motivation and productivity.

Mixing Agile and Lean with Kanban

Kanban's flexibility allows it to interweave with various Agile and Lean practices. Techniques such as test-driven development (TDD), refactoring, acceptance test-driven development (ATDD), behavior-driven development (BDD), pair programming, and the principles of DevOps can all align seamlessly with Kanban's workflow management capabilities.

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- **TDD** emphasizes writing tests for code changes before actual coding occurs. You might integrate TDD within your Kanban board by modifying implementation steps to ensure adherence.
- **Refactoring** allows for code restructuring without changing behavior and can become part of the work's done rules.
- **ATDD** and **BDD** focus on writing tests and behaviors that enhance clarity and assure quality at higher abstraction levels.
- **Pair Programming** promotes collaboration between two programmers to drive better focus and code quality, providing opportunities for knowledge sharing.
- **DevOps** cultivates a partnership between developers and operations for seamless service deployment.

Why Kanban Works

The effectiveness of Kanban is driven by a combination of visualization, minimalism, and principles from queuing theory such as Little's Law. This framework provides transparent feedback on workflow health, promotes continuous improvement, and minimizes work in progress to speed up response times. Kanban encourages a single-piece flow, where the ideal is having only one item in progress at any time.

Improving Beyond Kanban

To push beyond Kanban's limitations, consider reimagining your workflow steps and embracing a broader perspective. The combination of critical chain

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project management and Lean principles—where waste reduction and enhanced throughput are prioritized—can yield remarkable improvements.

- **Critical Chain:** Focus on shortening the critical steps in your workflow and reallocating resources for maximum efficiency.
- **Lean Development:** Identify and eliminate waste across various aspects of development, ensuring alignment with customer value.

Lastly, global optimization involves understanding customer value delivery in broader contexts, like in systems thinking, to enhance overall value. It requires examining your workflows and processes with a keen eye for inefficiencies and opportunities for collaborative change.

Checklist for Further Learning

To deepen your understanding and apply these insights, consider the following actions:

- Separate swim lanes on your Kanban board for distinct workflows.
- Expand your board to include upstream and downstream processes.
- Utilize Personal Kanban for personal tasks organization.
- Familiarize yourself further with the intercompatibility of other Agile and Lean methodologies.
- Apply a critical chain approach to streamline your workflow.
- Employ Lean strategies to enhance quality and eliminate waste.
- Pursue global optimization within your organization by understanding

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value streams.

This chapter serves as a guide to exploring beyond your current capabilities with Kanban and empowers you to embrace continuous improvement and innovation in your projects and practices.

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