KAN BAN

SUPERPOWERS

**15 Innovative Ways You Can
Unleash the Full Potential of Kanban Boards:**
A Quick-Start Guide for Entrepreneurs
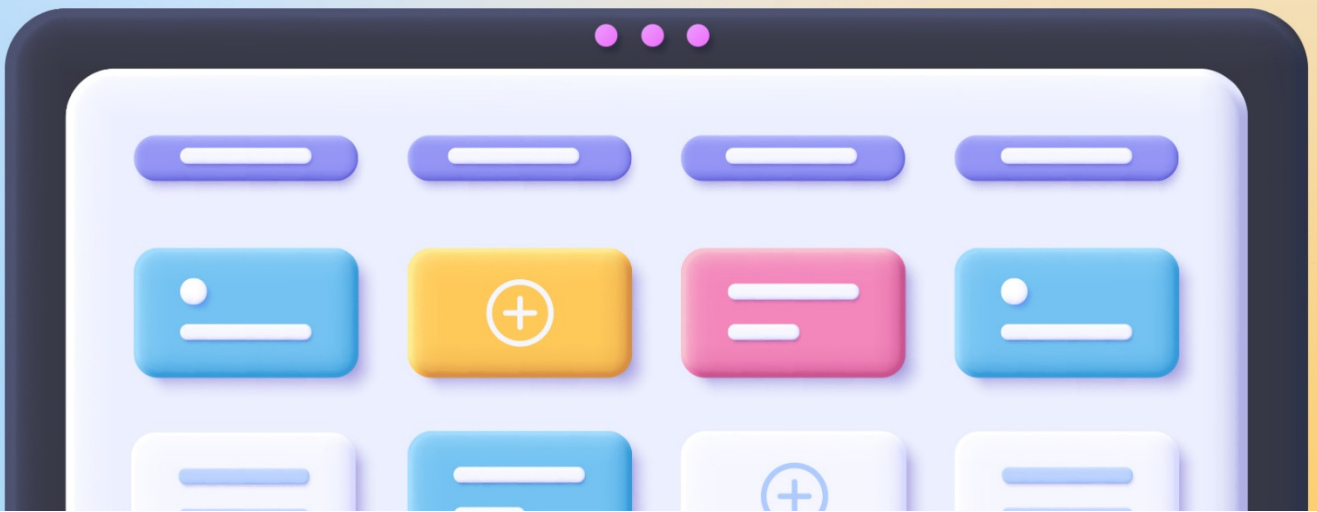
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CHAPTER I.
INTRODUCTION

Welcome to our guide on Kanban boards!

If you're reading this, you're probably already familiar with the basics of Kanban boards, so we'll make this intro quick …

As a refresher, a Kanban board is a visual representation of a workflow that allows teams to see the current workload at a glance.

Now as an entrepreneur, you already know that time is money … and that when it comes to managing projects, every minute counts. That's why Kanban boards are so valuable.

> **FUN FACT!**
>
> In the 1940s, engineer Taiichi Ohno was looking for a way to make Toyota's production processes more efficient. His brilliant idea? Using physical "Kanban" cards, so workers could signal when a certain part was needed on the assembly line. The Kanban boards we know today are a digital representation of those physical cards.

Because Kanban boards visually represent Tasks, they make it easy to see what's in progress, what's next, and what's blocked … so you keep work driving forward, full speed ahead.

A Kanban board also offers 100% transparency, so teams have a shared understanding of the work to be done, who's doing it, and its current status. As a result, your team runs like a well-oiled machine.

Even better, a Kanban board is a fantastic tool for identifying bottlenecks and inefficiencies in workflows, so you can make adjustments that fuel productivity.

In this guide, we'll dive deeper into the world of Kanban boards and show you tons of different ways they can help your team be more efficient.
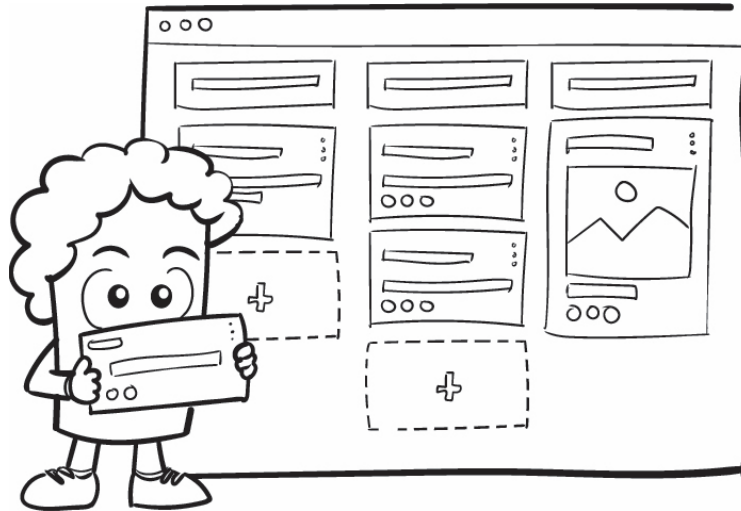
Sound good? Alrighty then, let's get started!

CHAPTER 2.
KANBAN BOARDS: THE BASICS

Kanban boards may look simple, but there are a few core principles that you'll need to understand in order to get the most out of them.

In this section, we'll take a look at the basic building blocks of a Kanban board: Tasks, columns, and labels. You'll also learn about Teamly's time-saving automations.

Tasks - Each Kanban board contains digital cards that store information. In Teamly, these digital cards are called Tasks. Tasks are typically used to describe work that needs to be done, although they can also relay other types of information, such as team goals or announcements.

In Teamly, you can create a new Task by clicking on the "+ Add a task" button and entering a name and description for the Task. You can also optionally add attachments, set due dates, and assign the Task to a team member.

Columns - Tasks are organized into columns, which represent different stages of work progress. For example, you might have columns for "To Do," "In Progress," "Review," and "Done." In Teamly, you can add or remove columns, and you can also customize the order of the columns to match your team's workflow.

Labels - Labels are a way to add additional information to a Task. For example, you might use labels to indicate the type of work that needs to be done, whether that work's been approved, or which department needs to perform the work. In Teamly, you can create custom labels and apply them to Tasks.

By understanding these three basic building blocks of a Kanban board, you'll be well on your way to managing your projects more efficiently.

Another time-saving tool that'll help you manage your projects better is **automations**.

Automations let you create rules about how Teamly handles repetitive tasks. So, you can use automations to specify which action Teamly should perform when certain conditions are met (i.e., If X is true, then do Y).
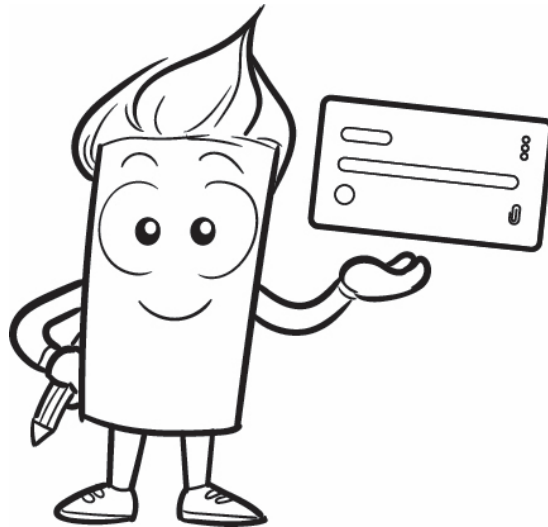
With automations, you can have Teamly do cool stuff automatically, like:

- Assign Tasks
- Flag work that's overdue
- Archive Tasks to keep your board neat
- And much, much more!

Bottom line? Automations make it even easier to manage your team's tasks (effortlessly)!

CHAPTER 3.
GETTING STARTED WITH
KANBAN BOARDS

Teamly's Kanban Boards are incredibly easy to use, even if you've never worked with project management software before.

And to help you get up and running fast, we've created step-by-step tutorials that'll show you everything you need to know to become a Kanban board master!

In this section, you'll learn how to:

- Set up a new Kanban board in Teamly
- Create and assign Tasks to users
- Move Tasks between columns to indicate progress
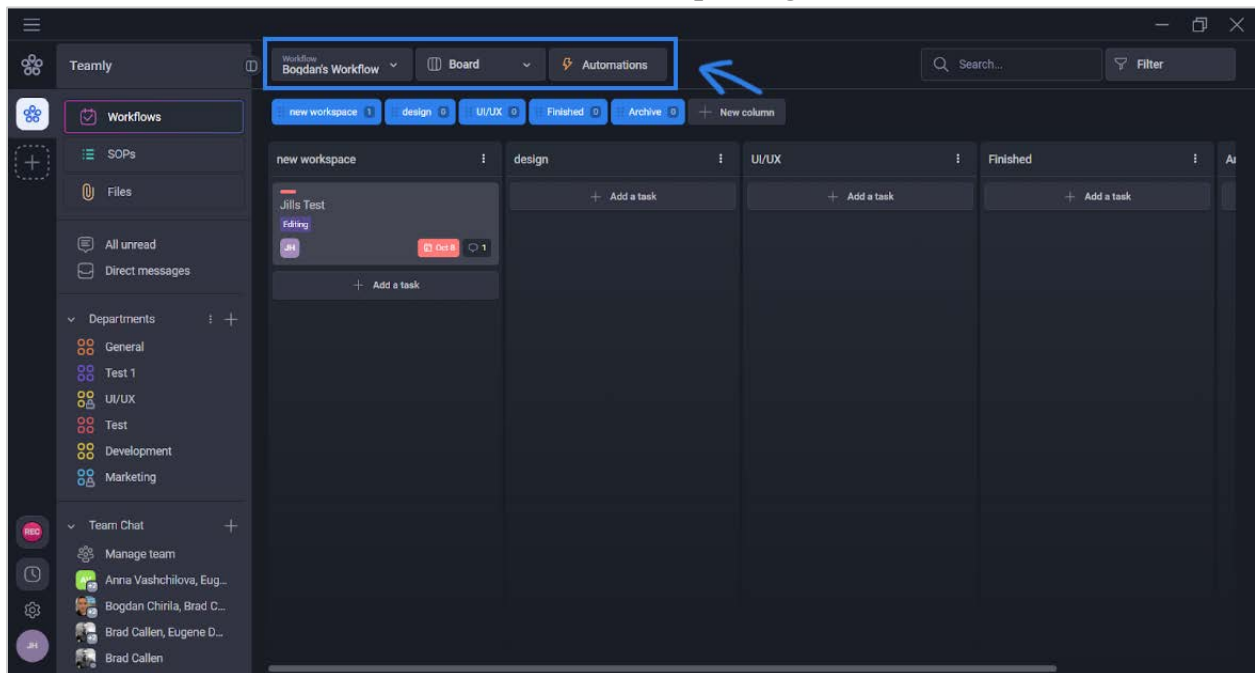- Create custom automations

So, let's not waste any time and get right to it! Scroll to the next page for a quick lesson on how to set up a new Kanban board.

To set up a new Kanban board in Teamly:

1. Click **Workflows** in the left sidebar.
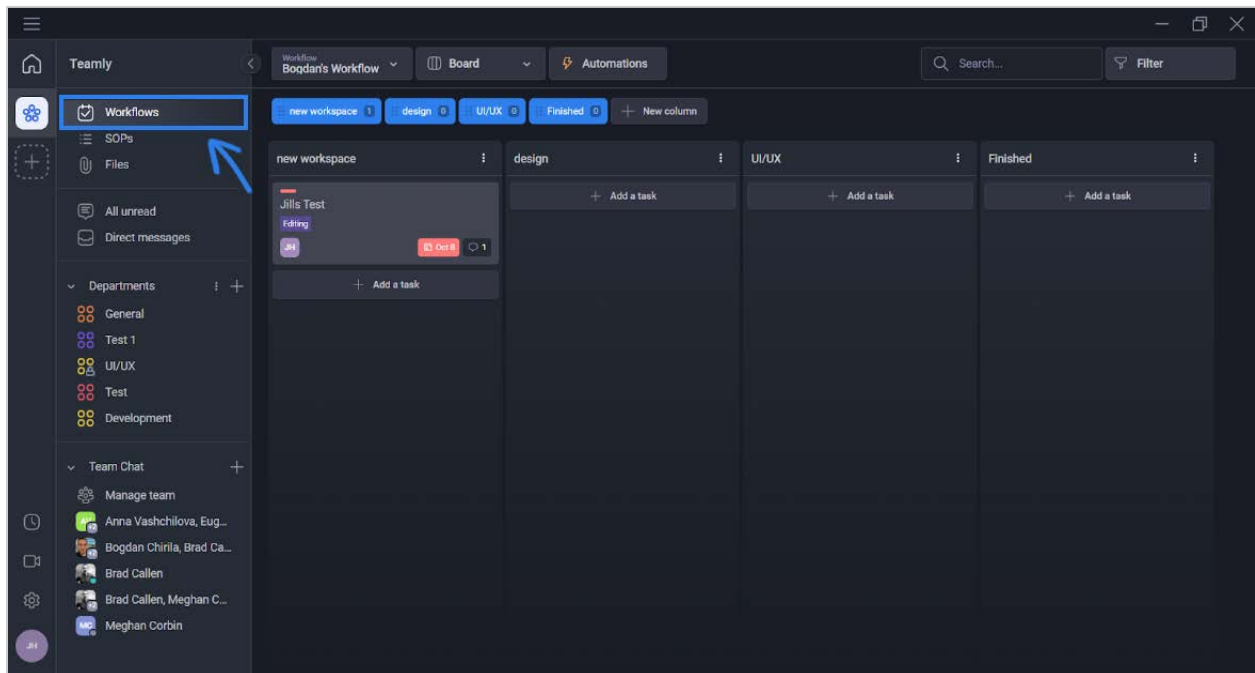
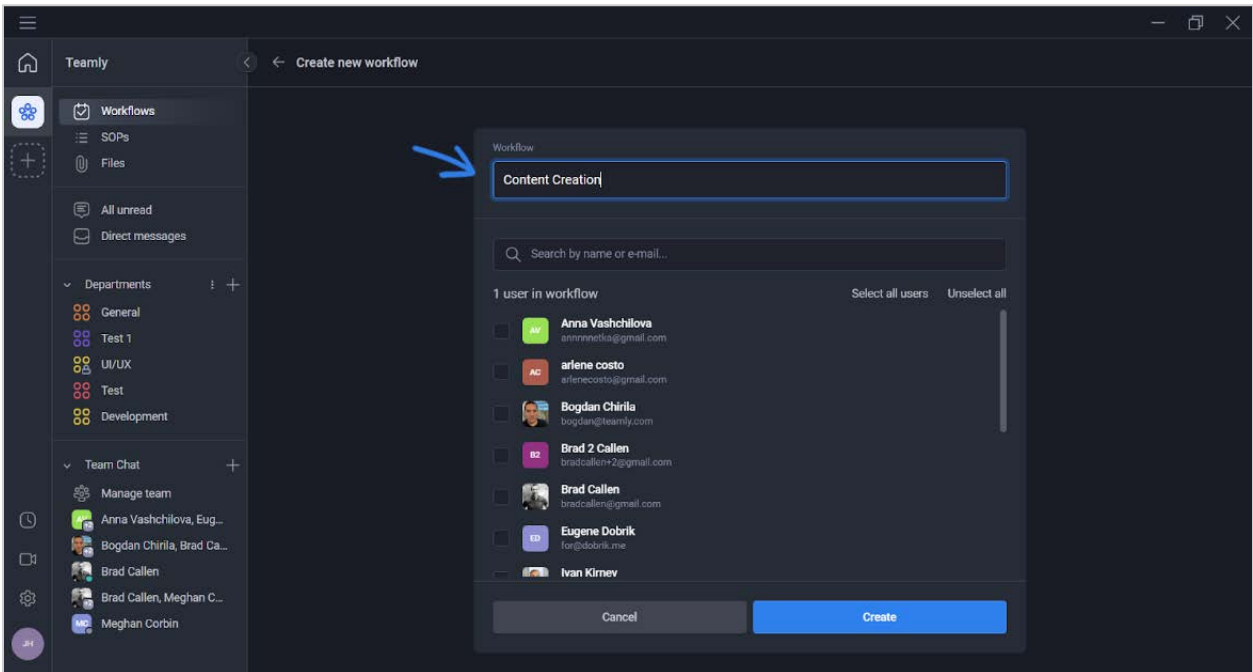2. Click the **workflow picklist** located in the top navigation bar.
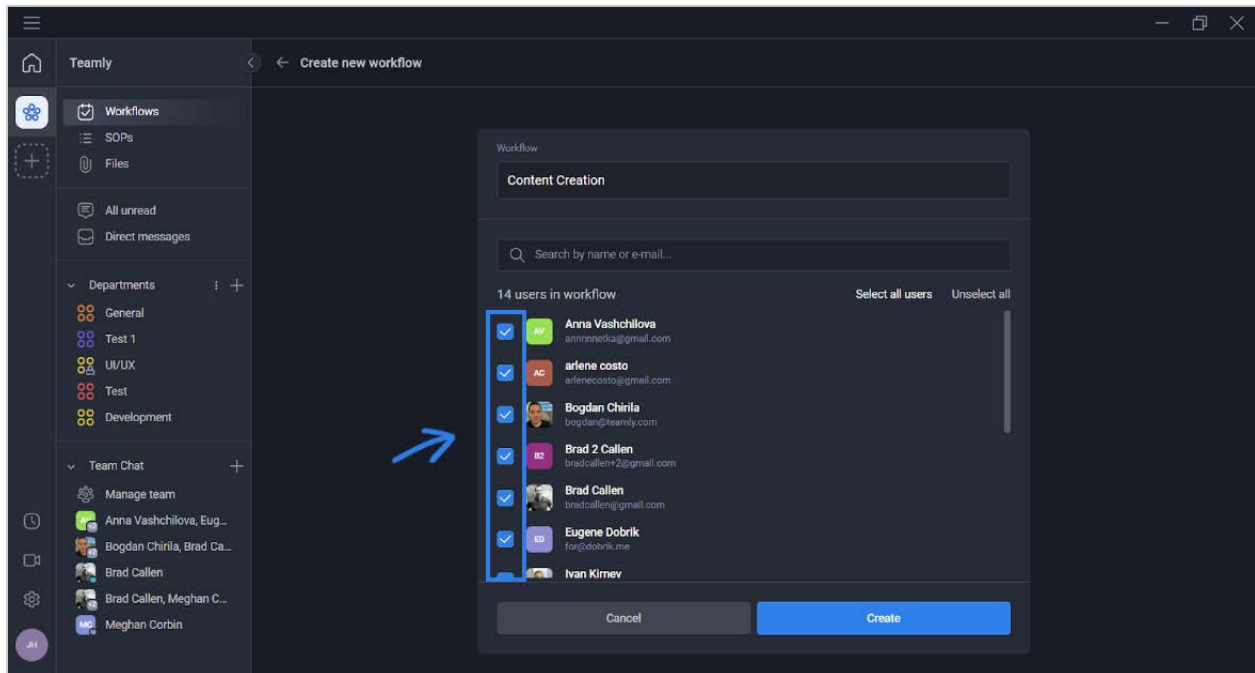
3. Select **+ New Workflow** from the workflow picklist.
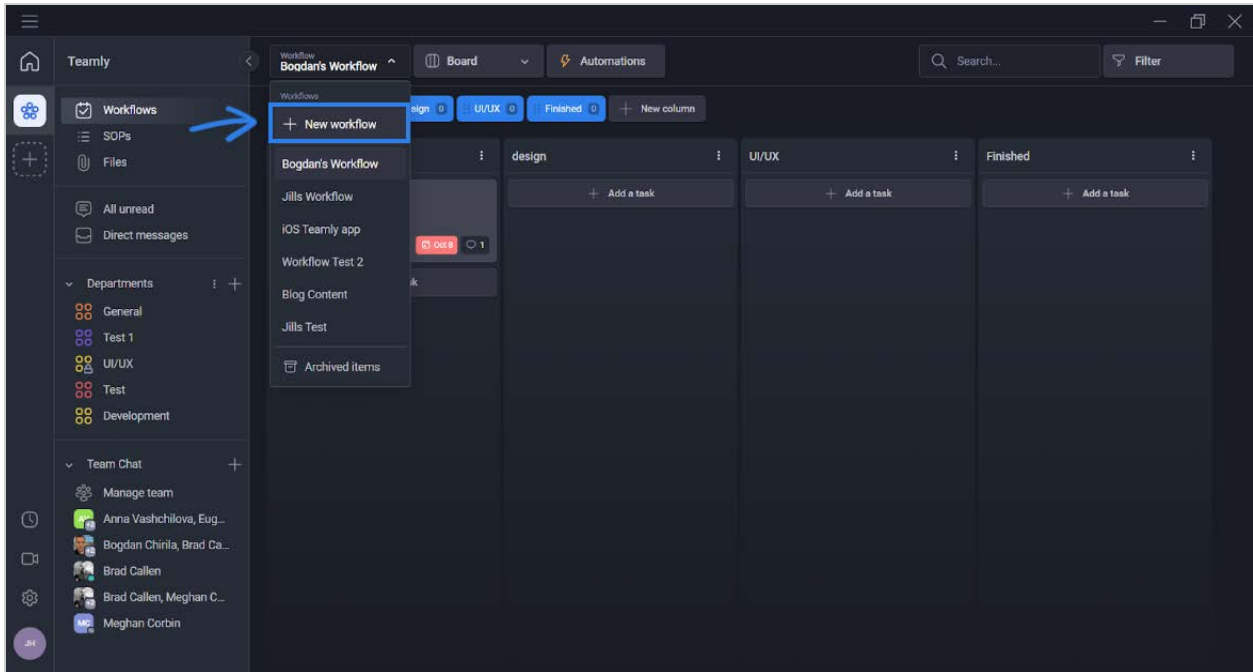
4. Enter a name for your workflow in the **New workflow textbox**.

5. Click the **checkbox** next to the names of the users who will have access to this workflow.

Note: Users can't view a workflow if they haven't been granted access.

6. Click the **Create button**.
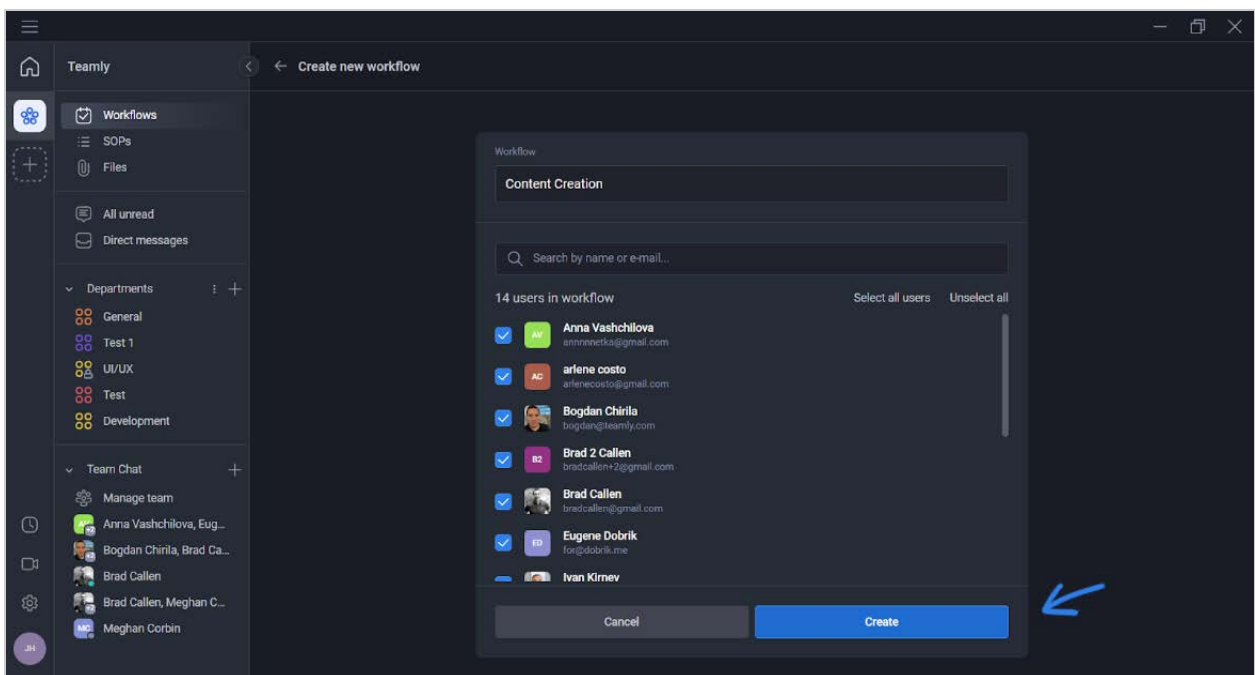
Now that you've created your Kanban board, you'll want to add columns to your workflow. These columns keep work organized by indicating the stage of progress that Tasks are in.

For example, you might create a *Content Workflow* by using the following columns:

- Not Started
- Writing
- Under Review
- Approved
- Published

7. To create your first column, click the **+ New column button**.
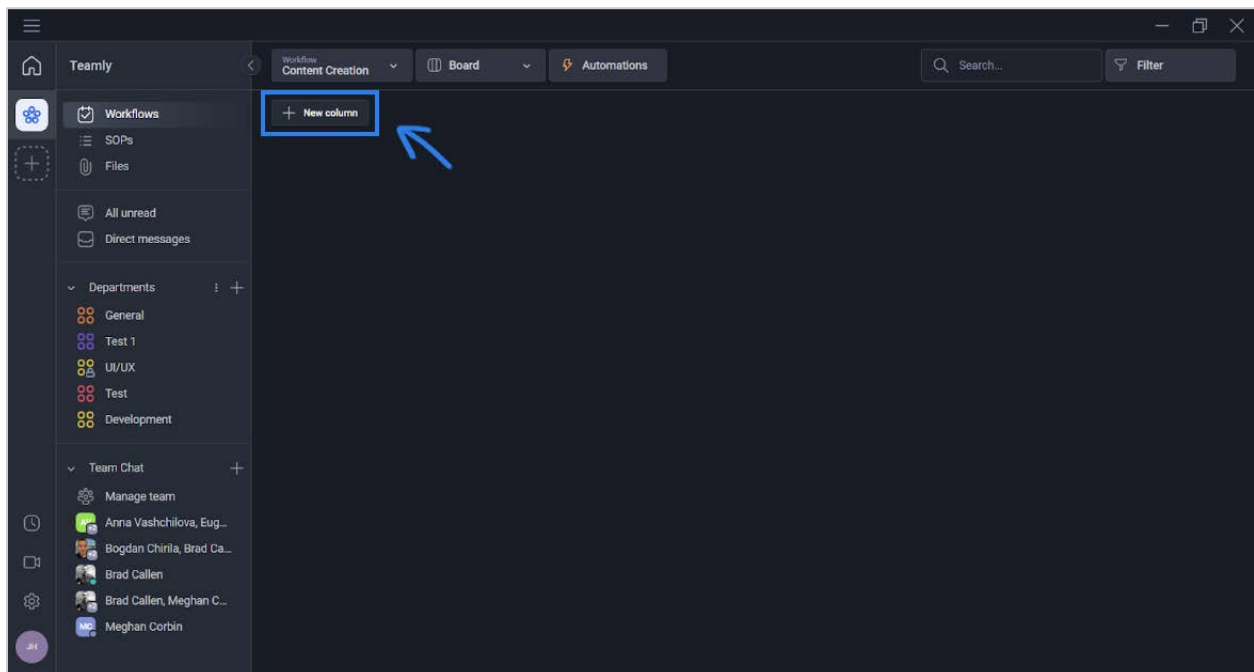
8. Enter the name of your column in the **List title textbox**.
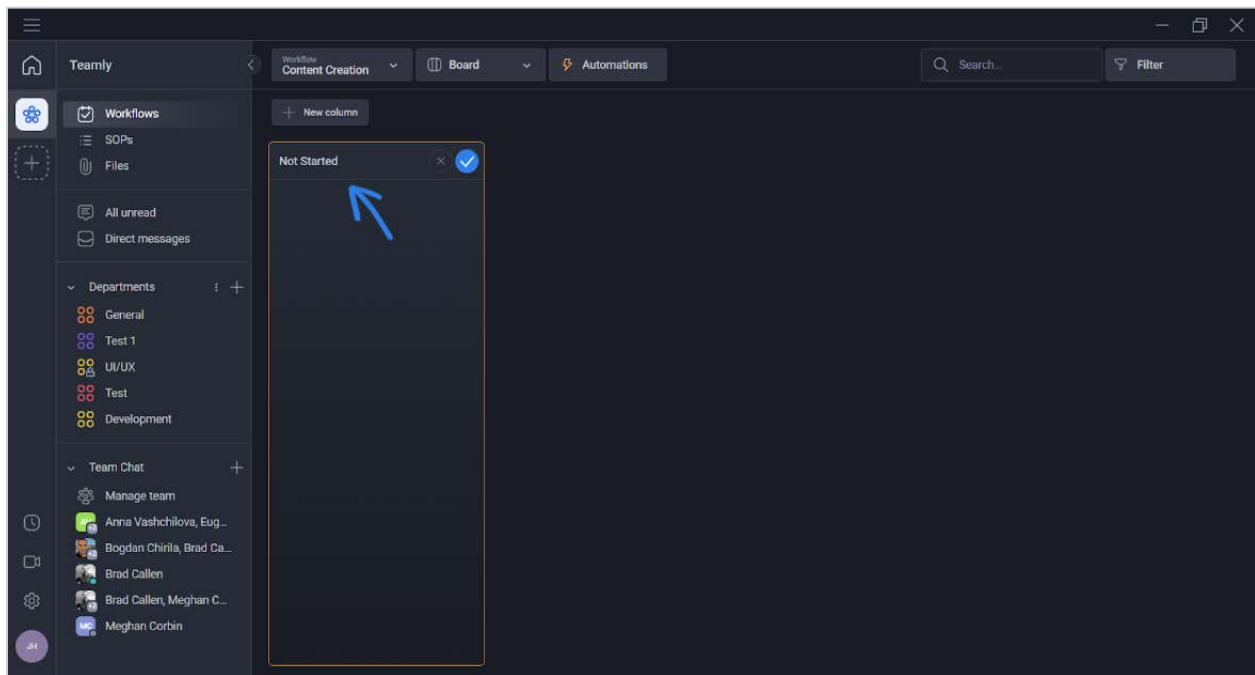
9. Click the **blue checkmark icon** to finish creating your column.
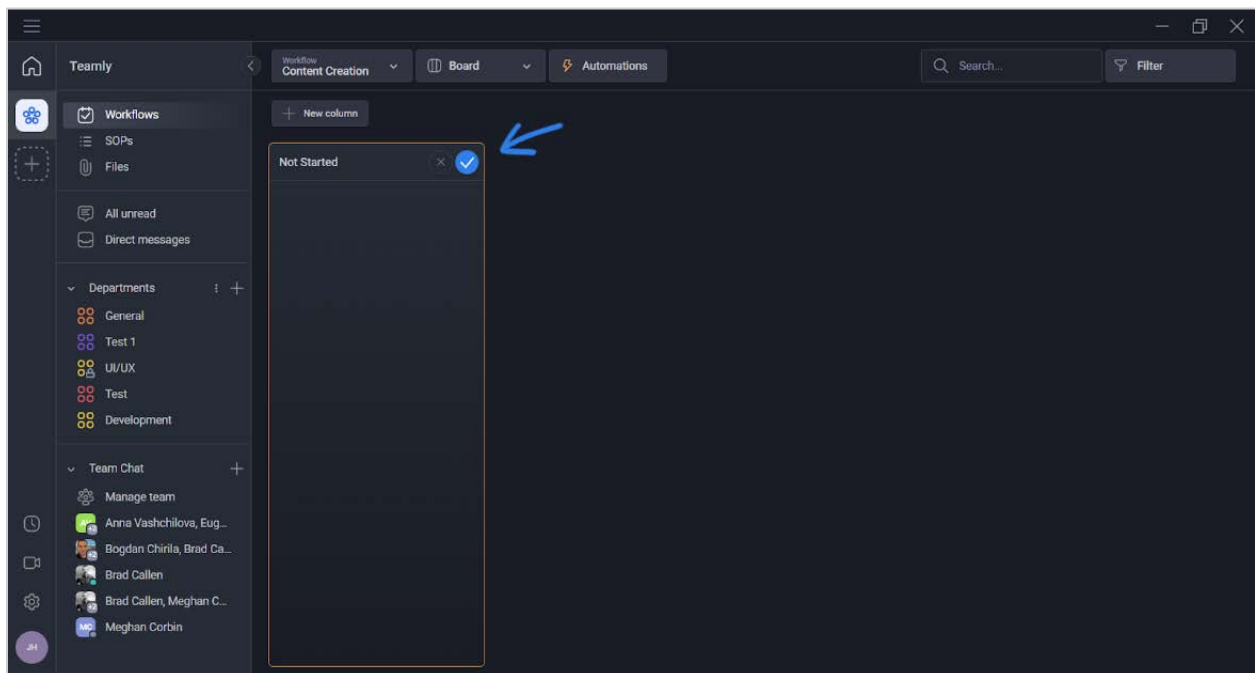
10. Click the **+ New column button** to add your second column.
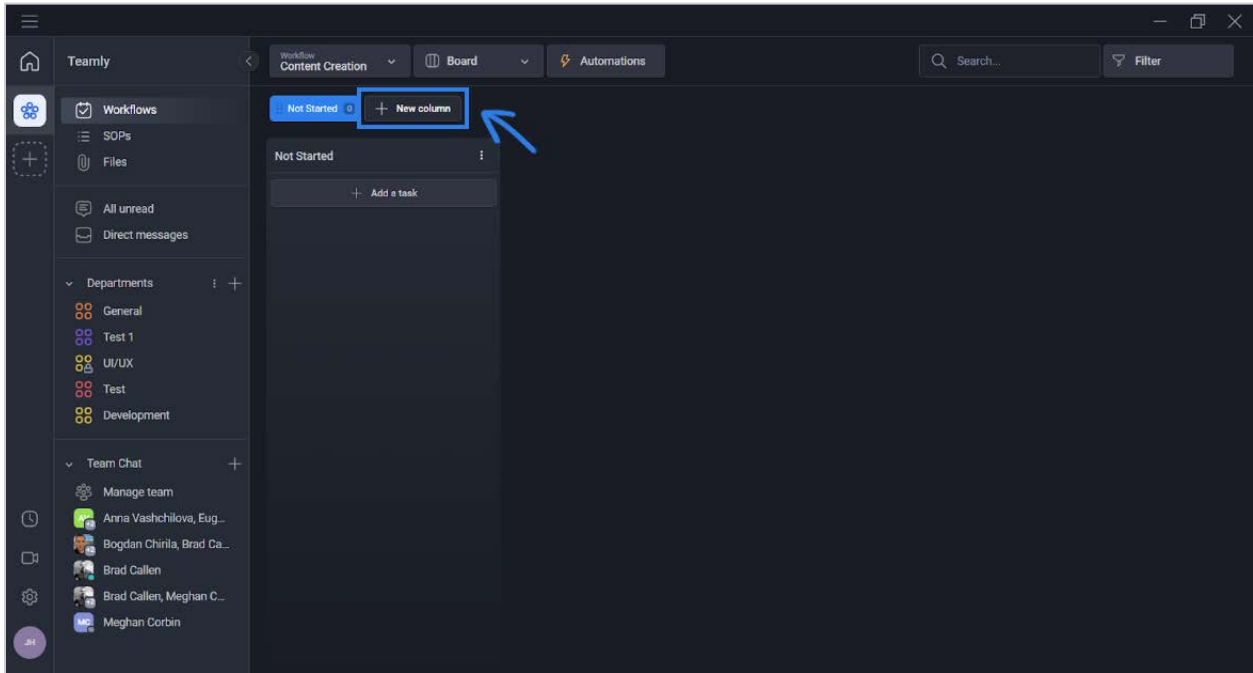
11. Enter the name of your second column, then click the **blue checkmark icon**.
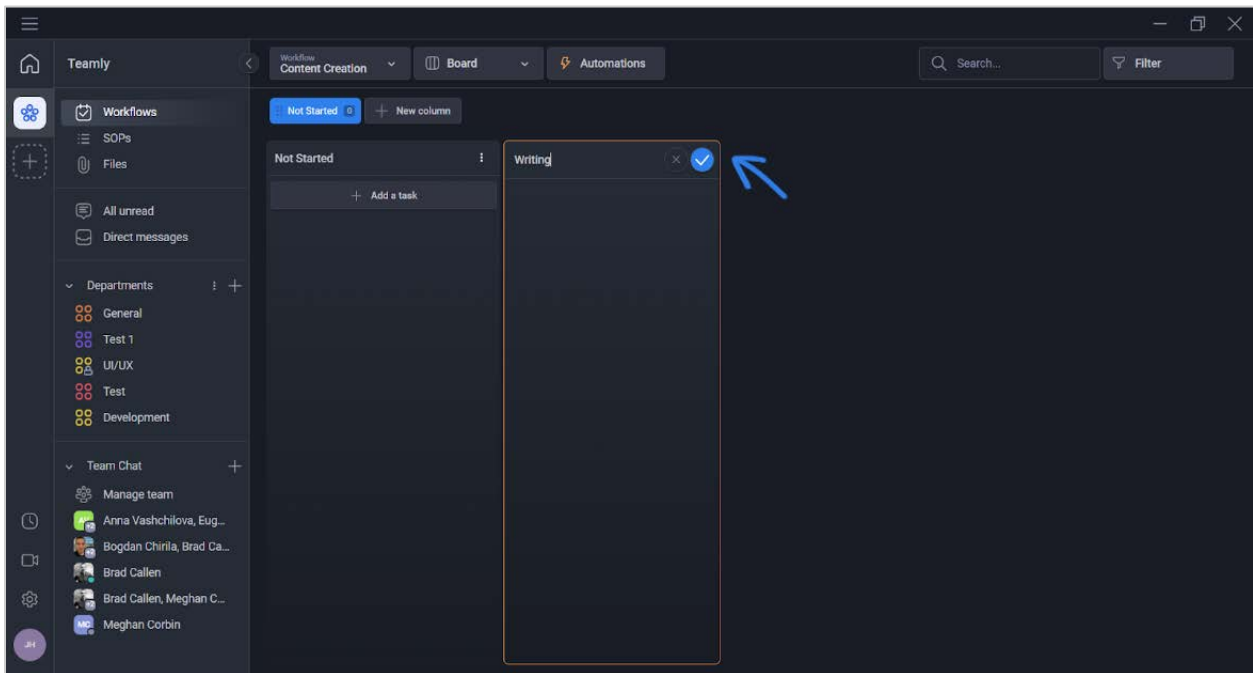
12. Repeat this process until you've finished creating your custom workflow.
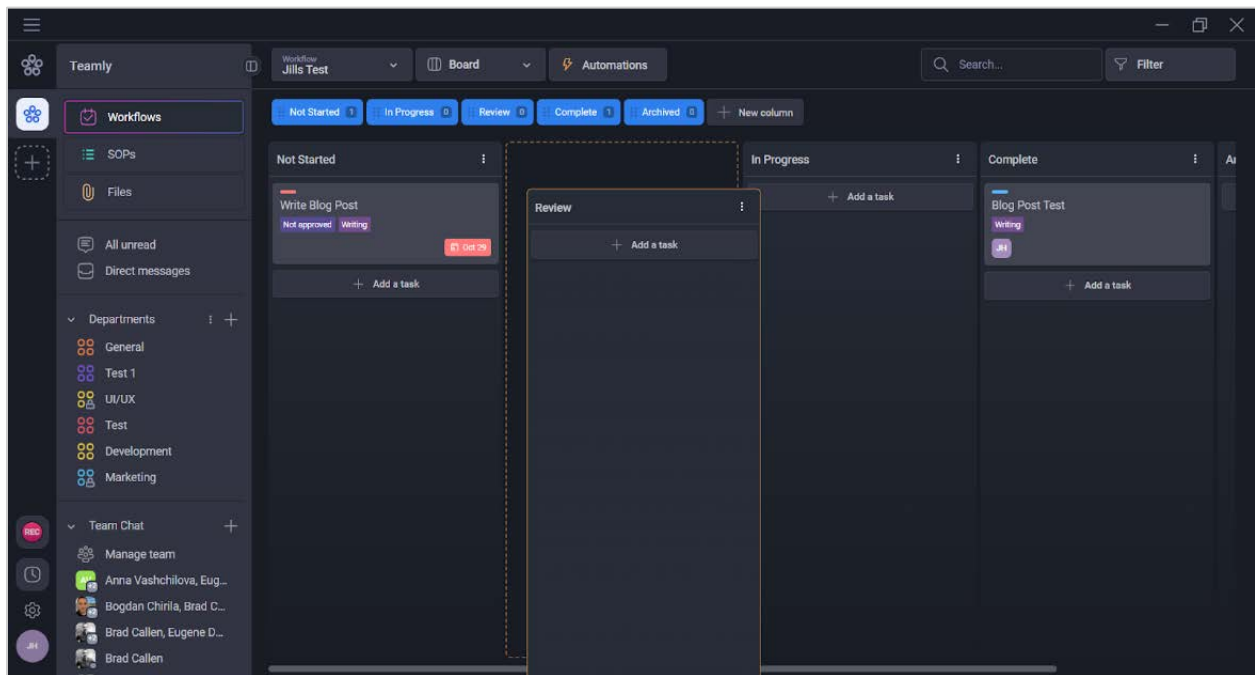
Hint: If you need to reorder columns, just click the top of a column, then drag and drop it to your desired location.

Once you've finished creating your custom workflow, you're ready to create your first task.

To create and assign a Task:

1. Click the **+ Add a Task button** in the column that you want to add a Task to.
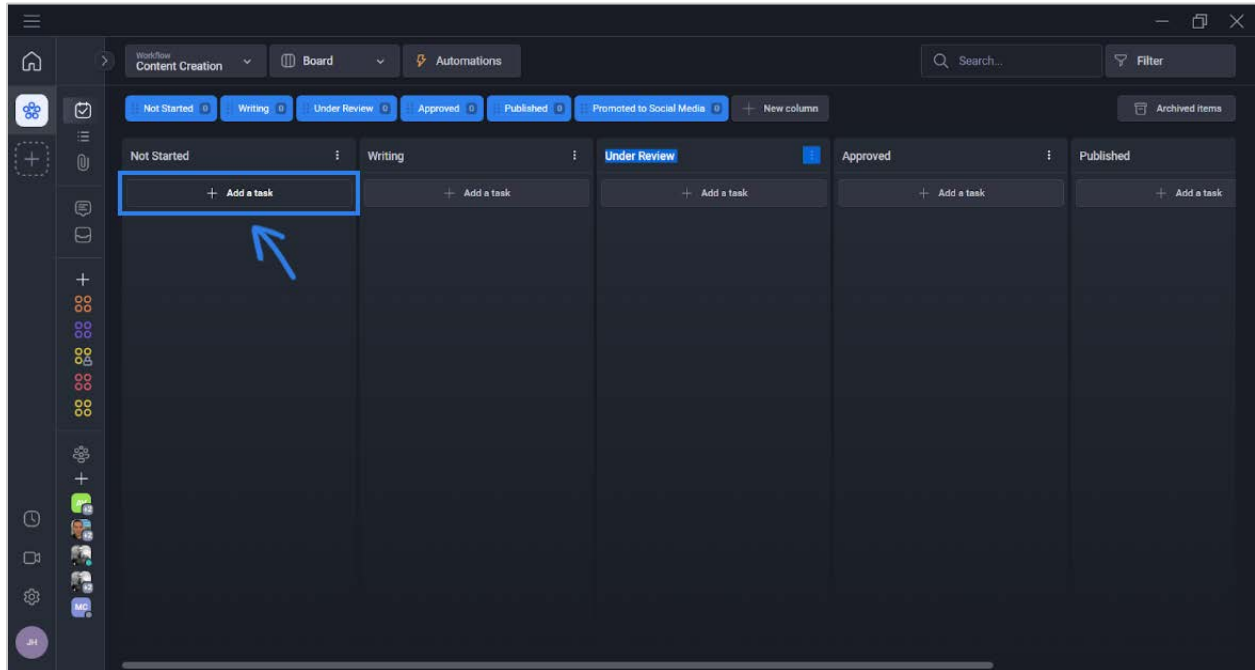
2. Enter a name for your Task in the **Task title textbox**.
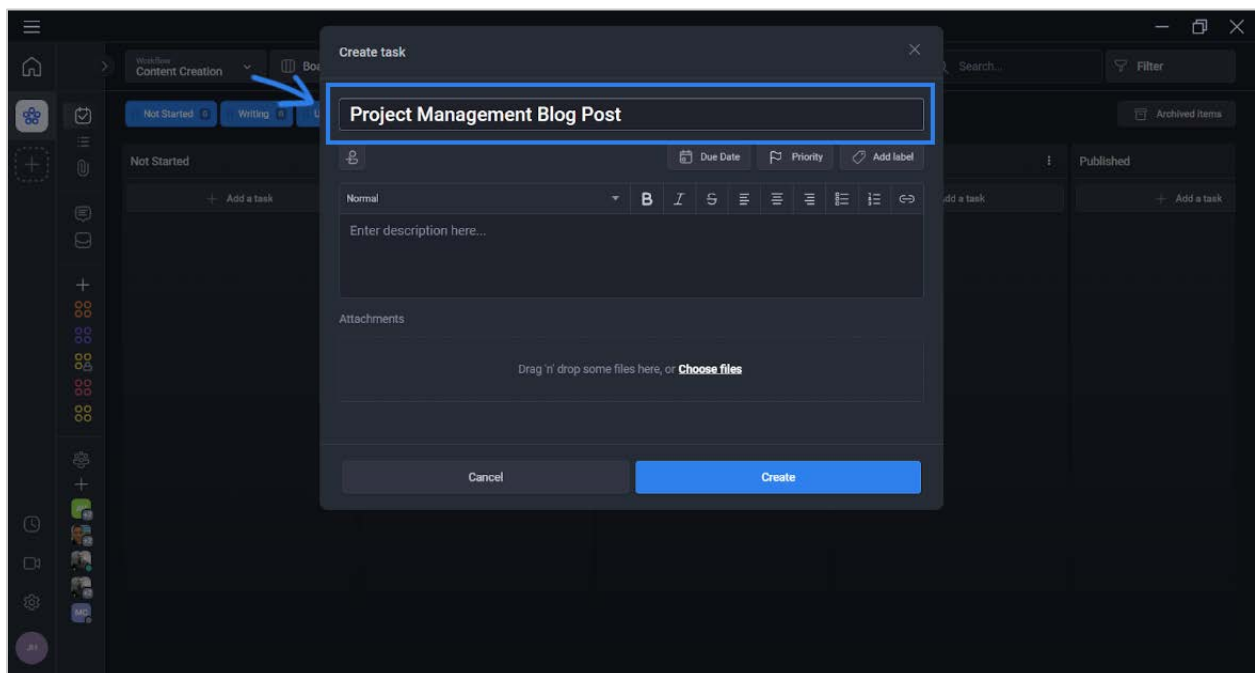
3. OPTIONAL: Enter a description of your Task in the **description textbox**.
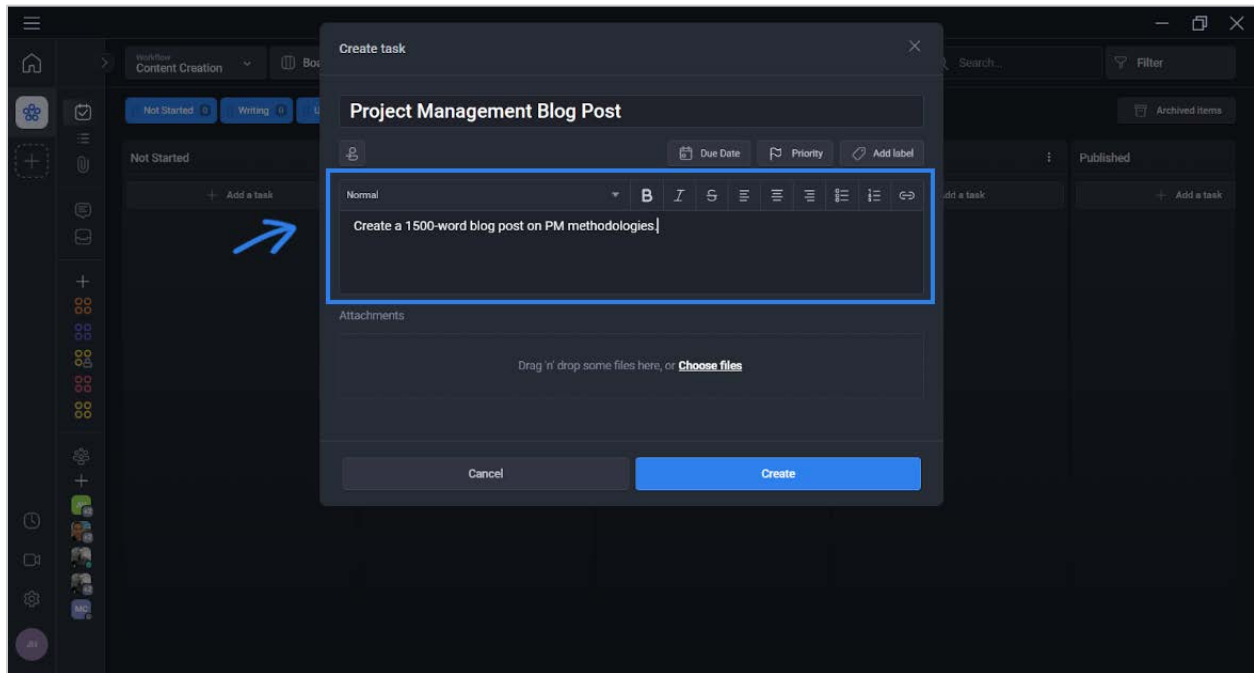
4. OPTIONAL: Click the **Due Date button** to select a due date for the Task.
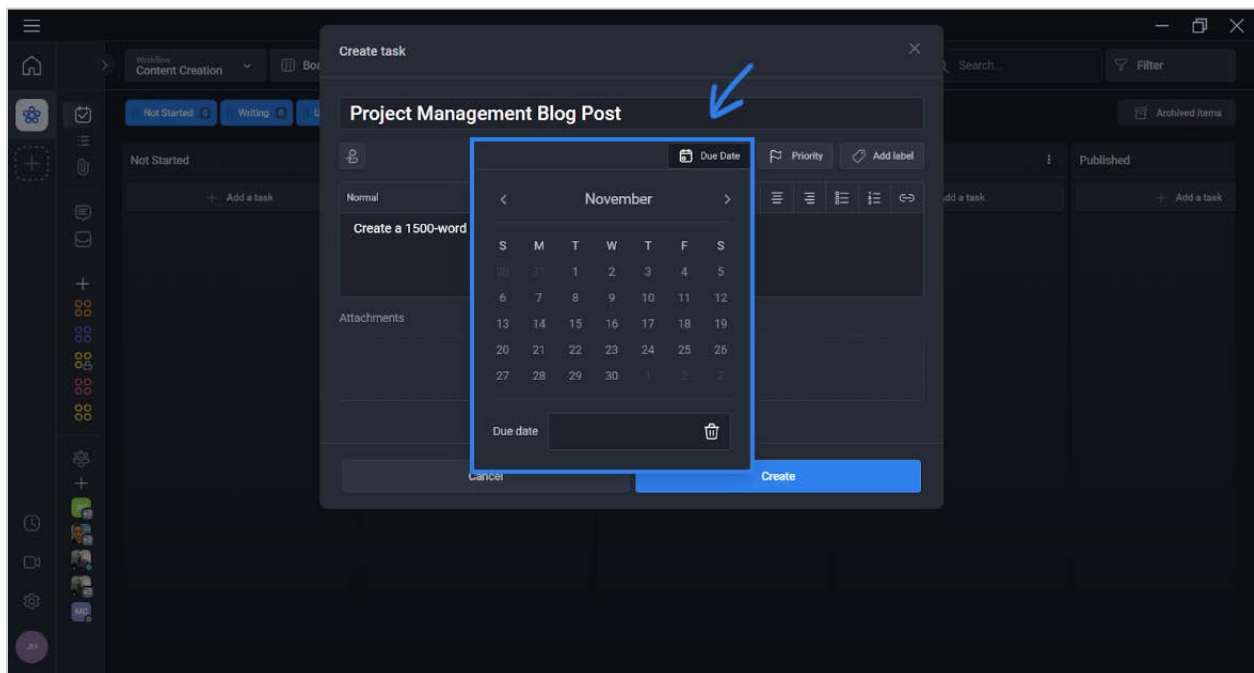
5. OPTIONAL: Click the **Priority button** and select a priority to indicate the Task's importance.
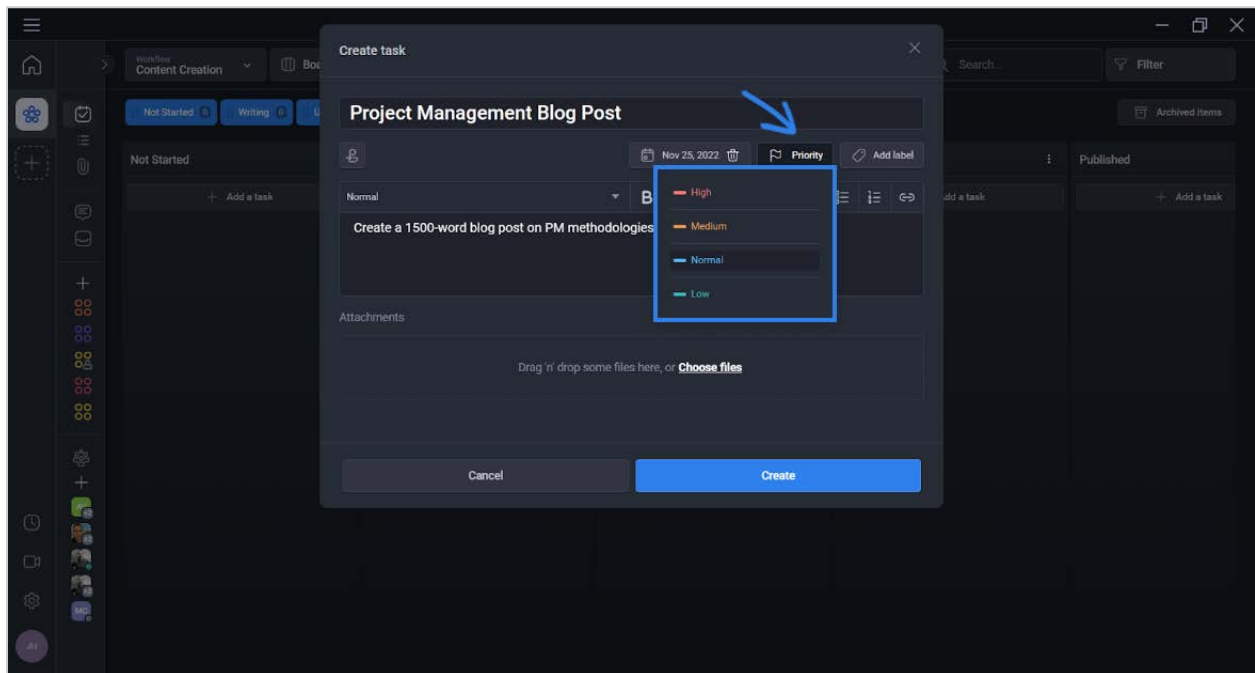
6. OPTIONAL: Click the **Add label button** to add a Label to your Task. If you don't want to use a label, go to Step 12.
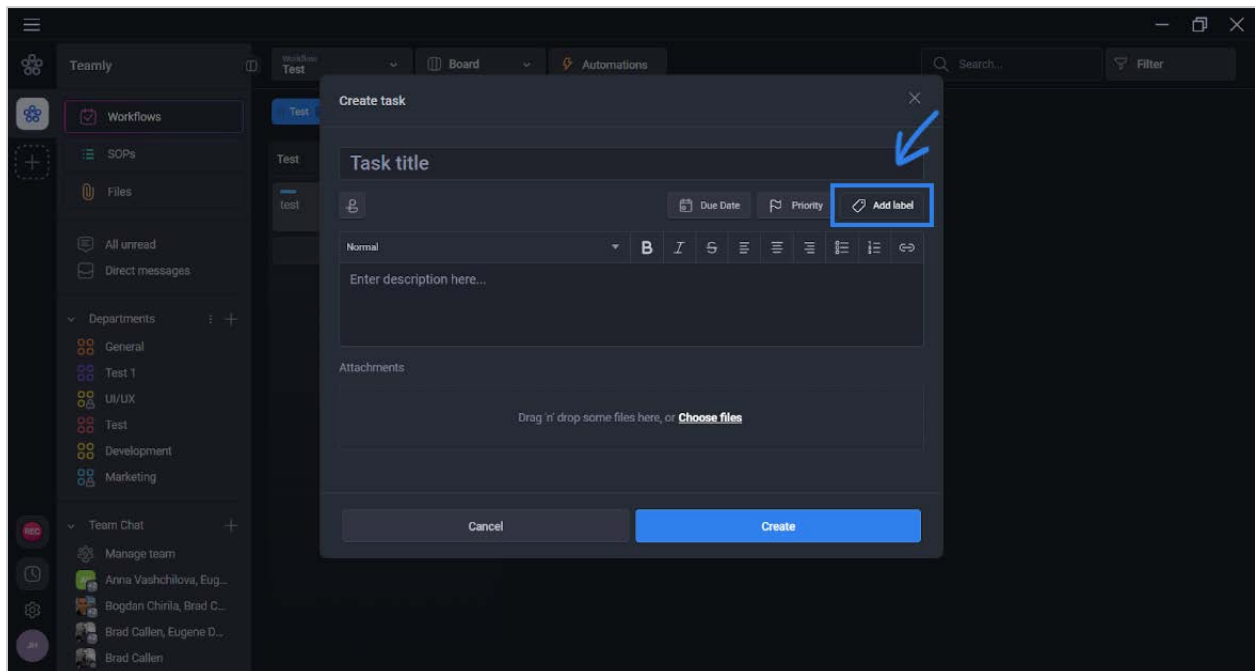
Note: Labels are fully customizable and can be used to further classify your Tasks.

7. After clicking the **Add label button,** click the **+ Create new label button**.
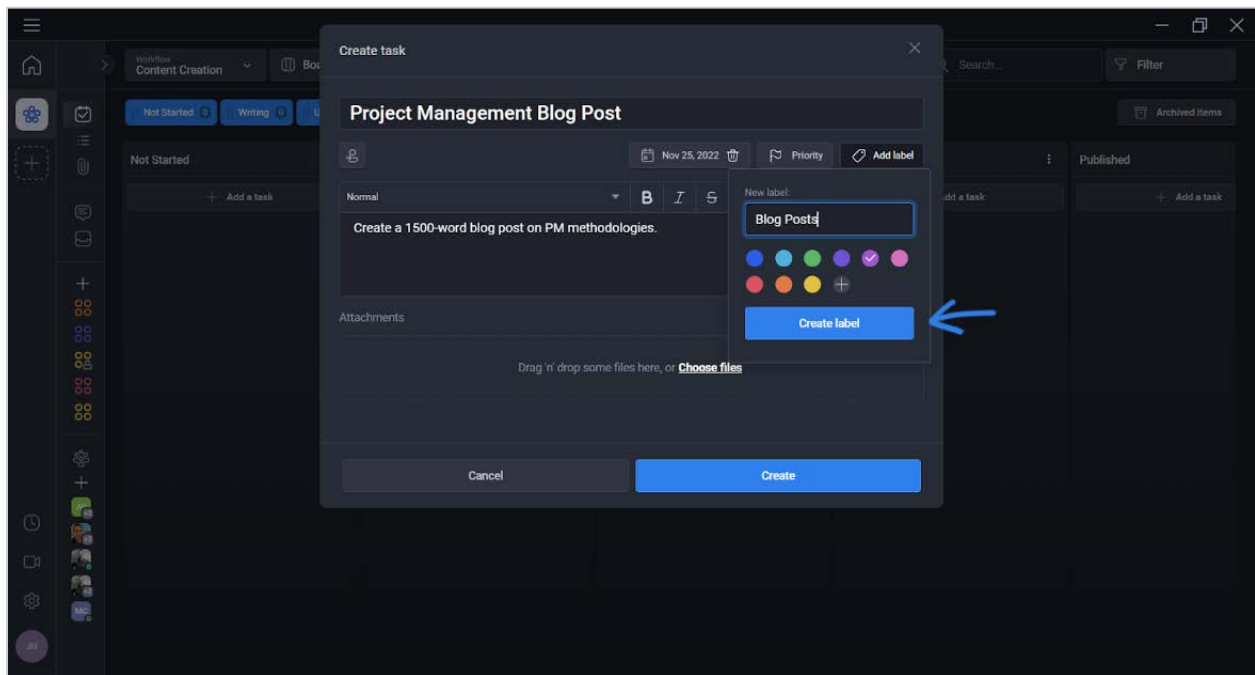
8. Enter the name of your label in the **New label textbox** and select the color you want to associate with the label.
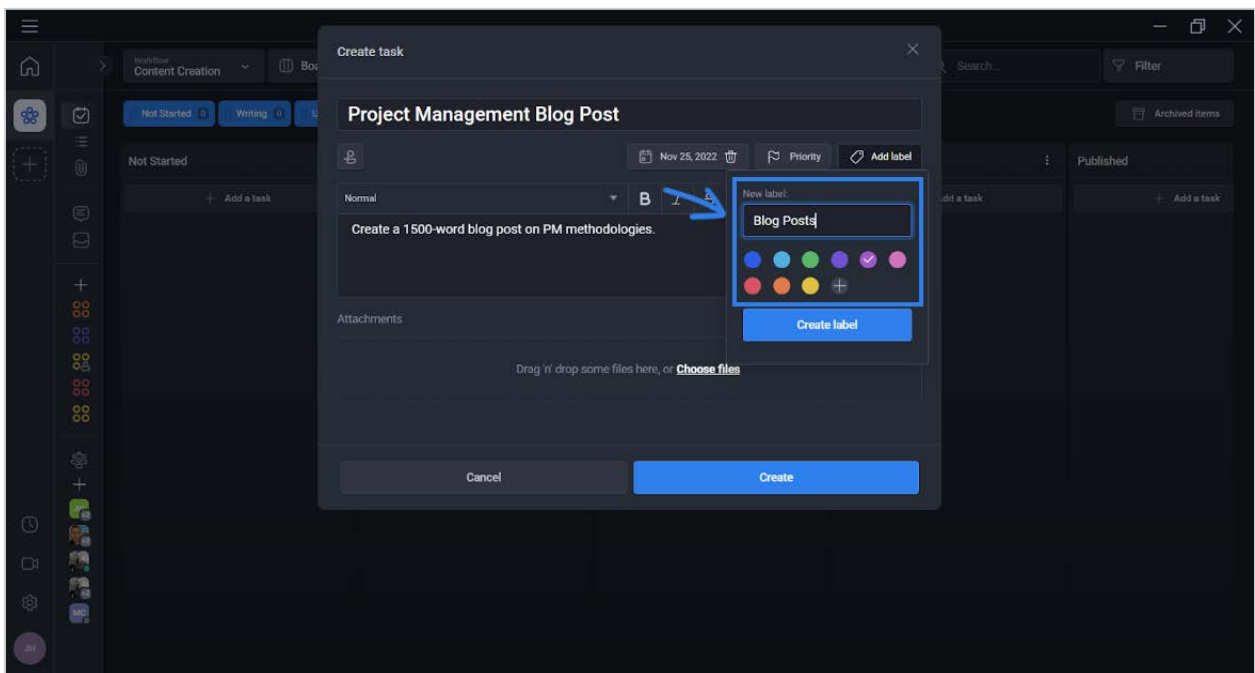
9. Click the **Create label button**.
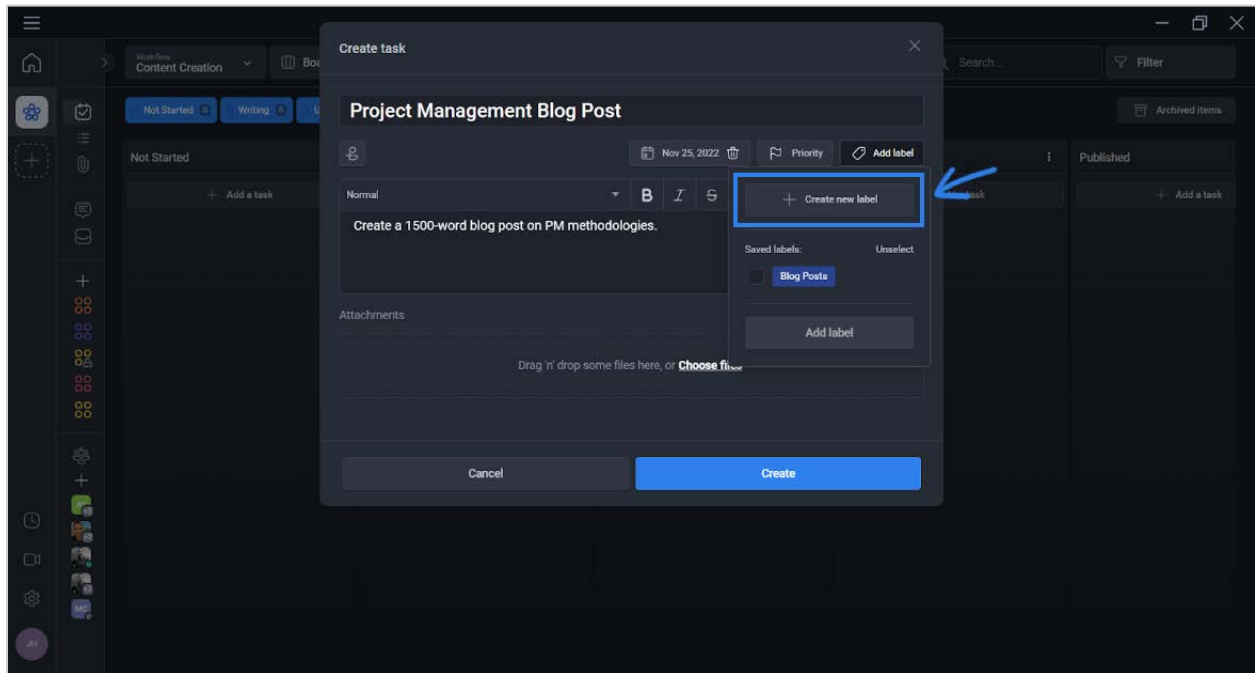
10. Click the **checkmark box** next to the label(s) that you want to add to your Task.
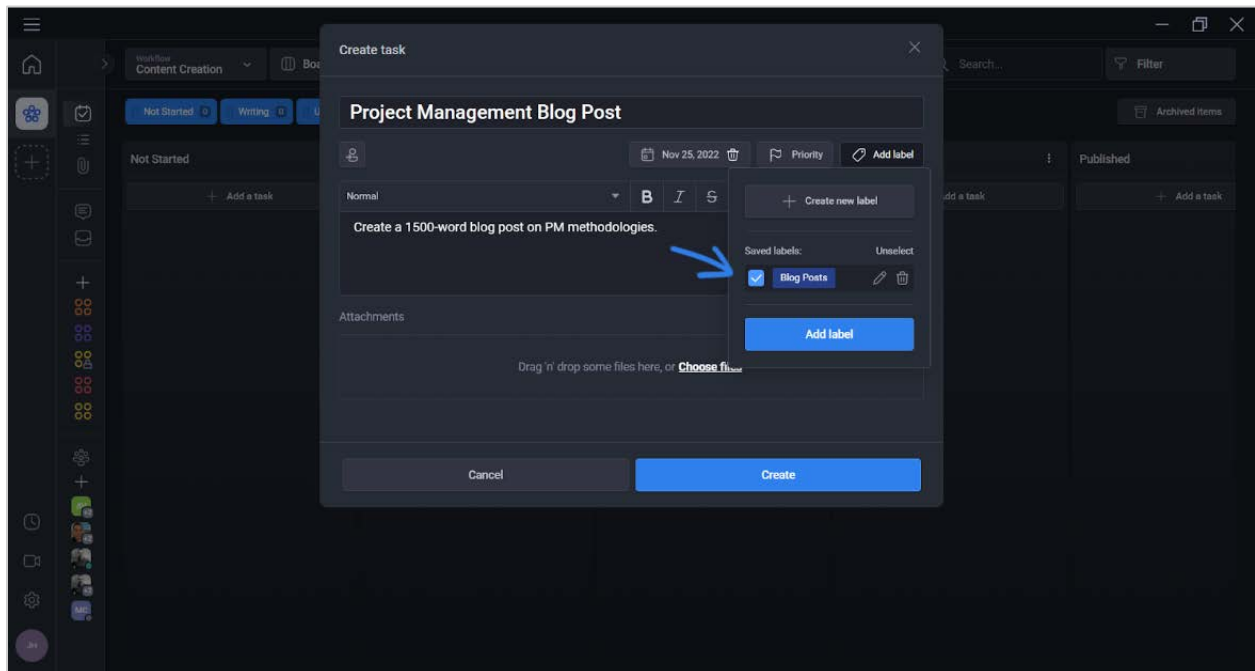
11. Click the **Add label button**.
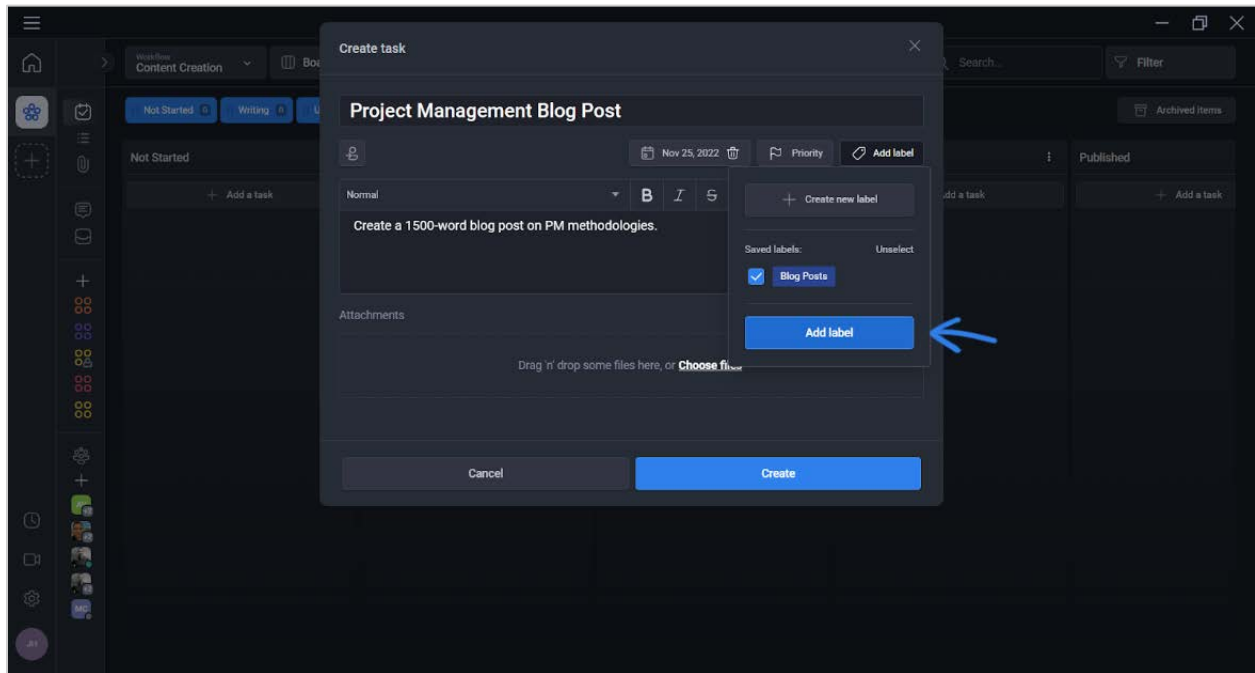
12. OPTIONAL: Click the **Assign user button** to assign user(s) to the Task. If you don't want to assign anyone to the Task, go to Step 14.
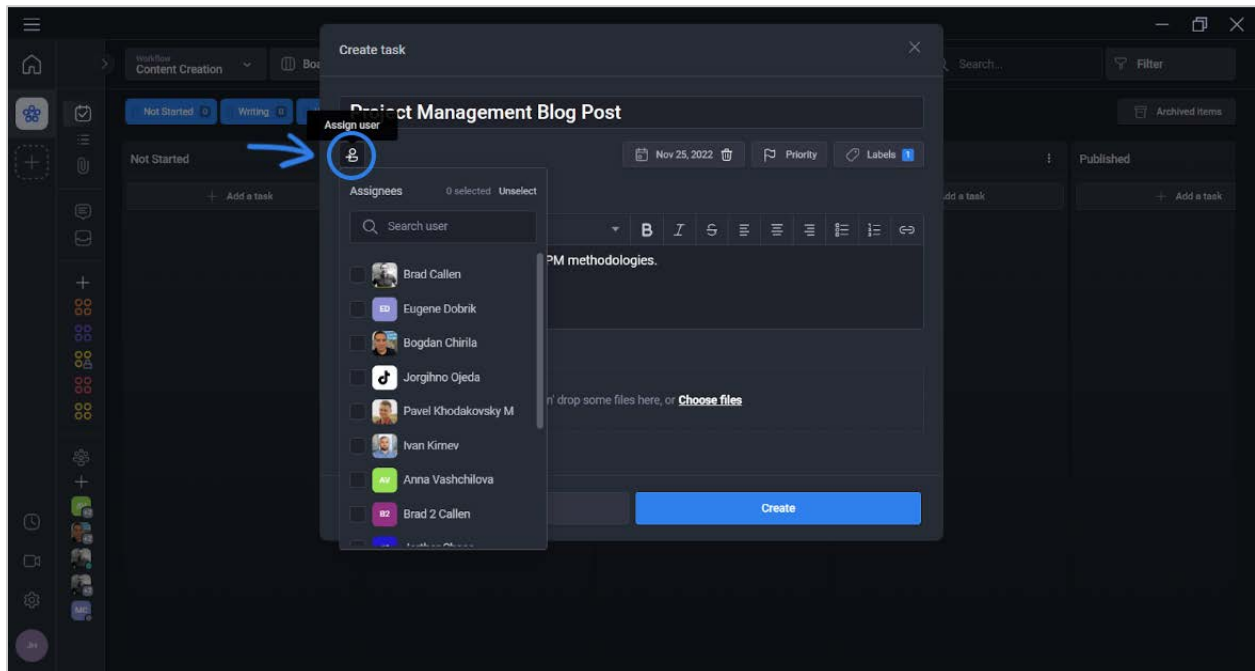
13. Click the **checkbox** next to the name of the user(s) that you want to assign the Task to.
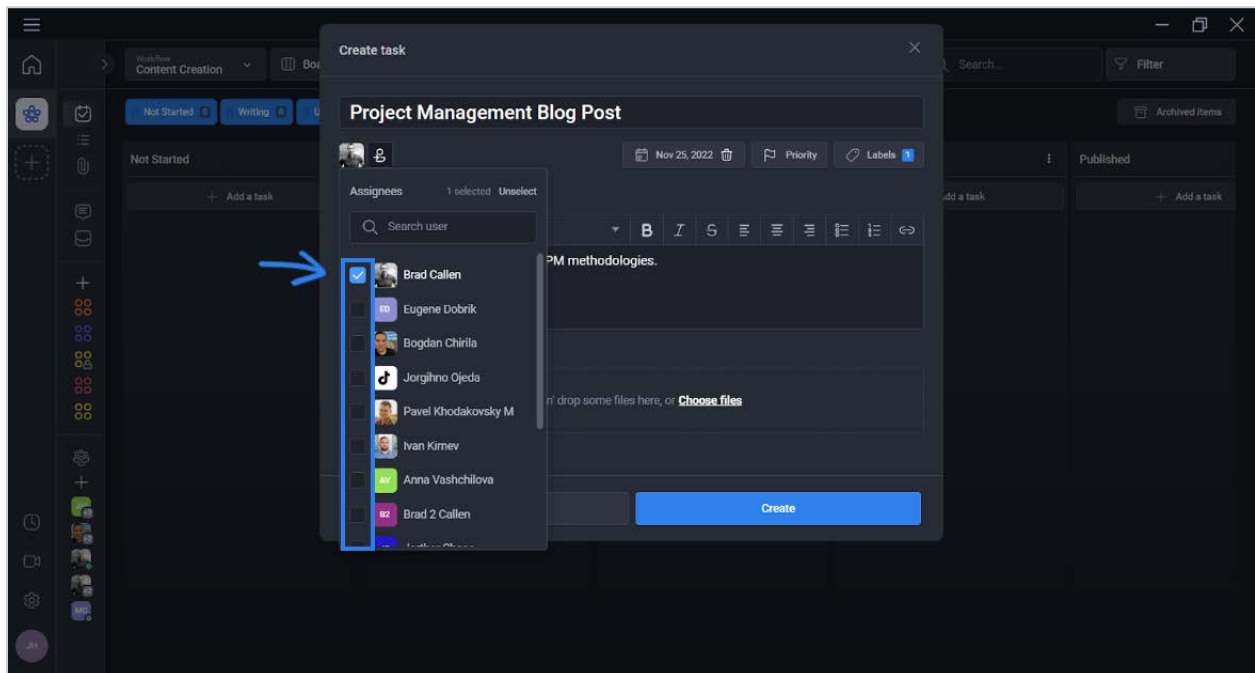
14. OPTIONAL: Click the **Choose files link** to add files to your Task.
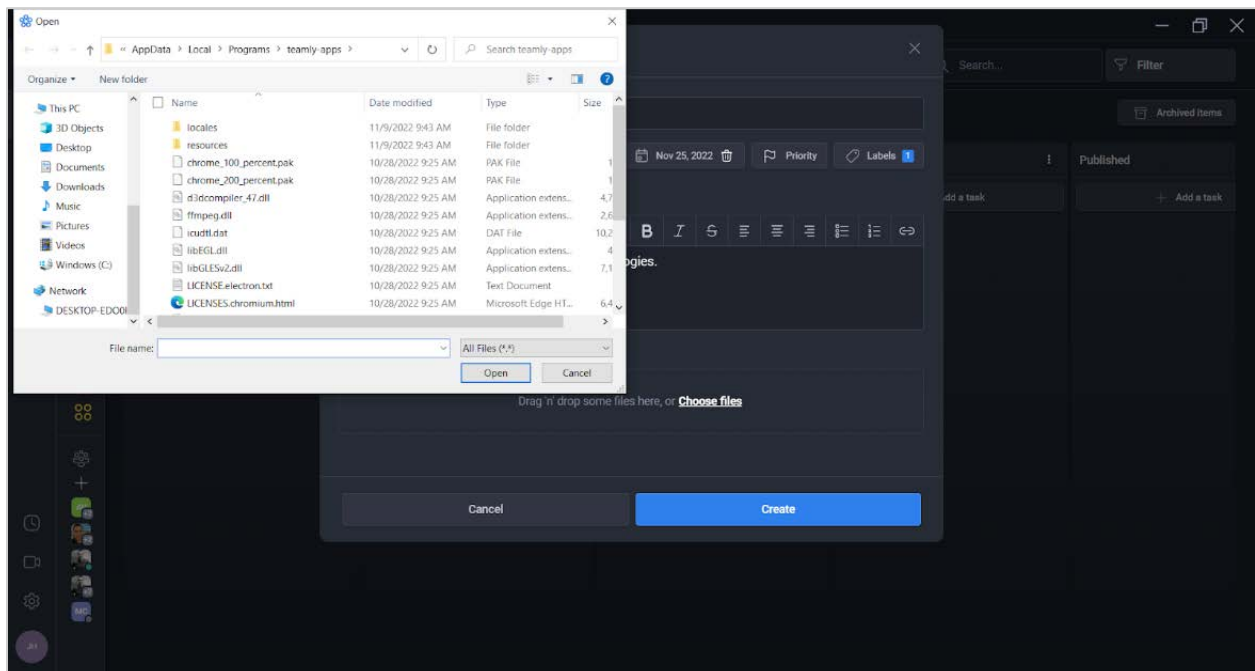
15. Once you're done editing your Task, click the **Create button**.
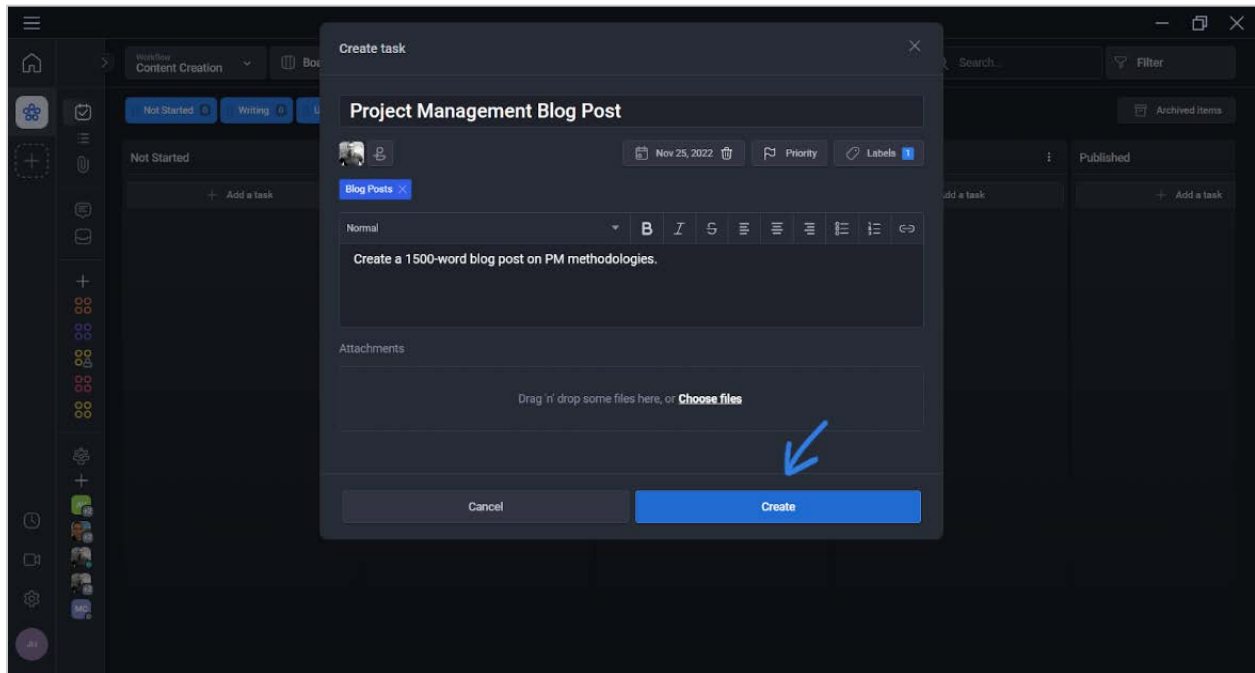
To move Tasks between columns:

Drag-and-drop Tasks to move them from one column to another.
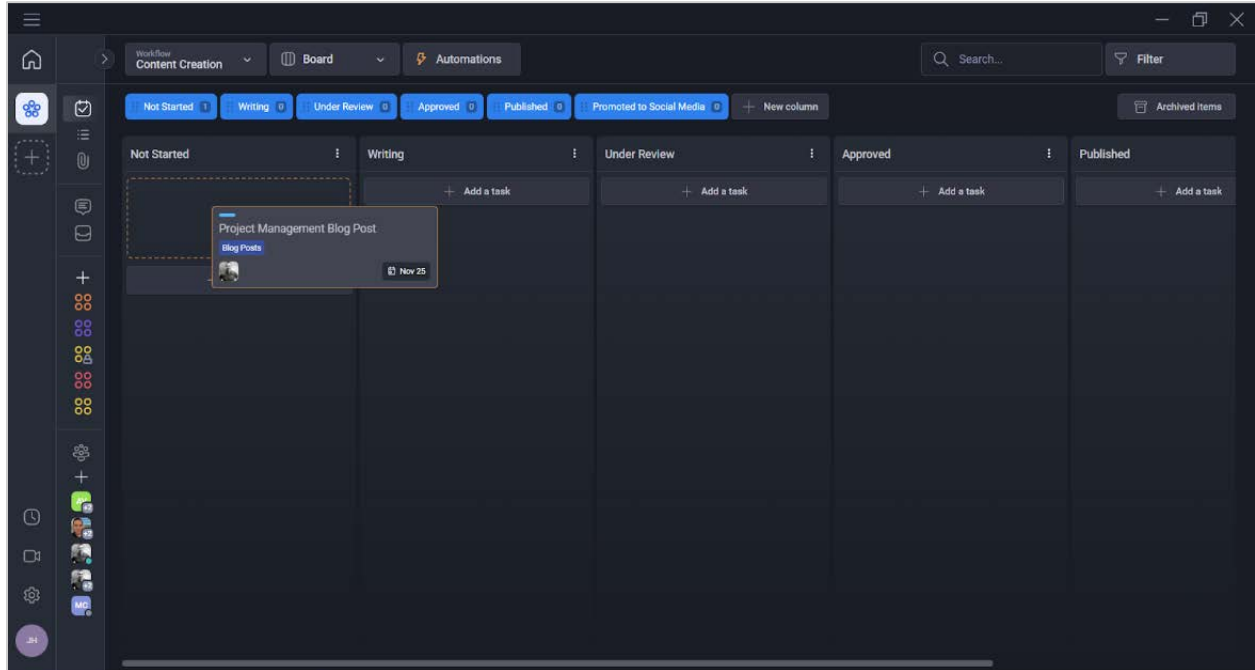
To create a custom automation:

1. Click **Workflows** in the left sidebar.
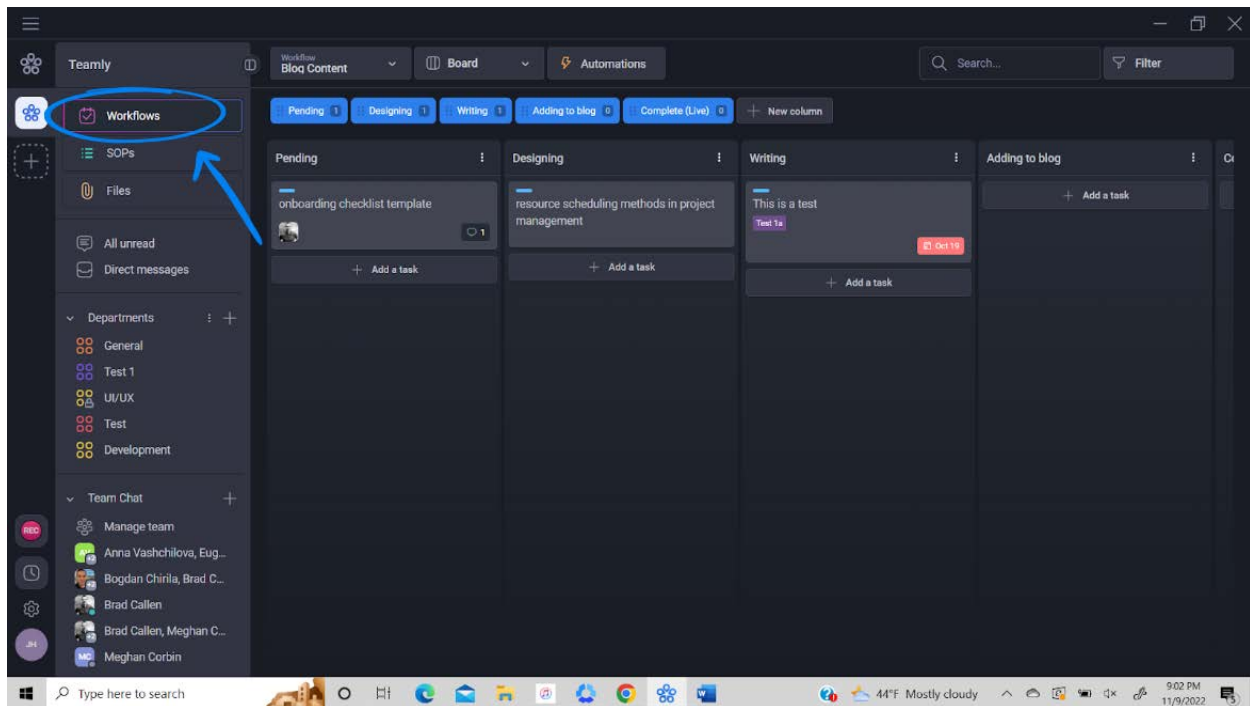
2. Select the workflow you want to add an automation to from the **workflow picklist**.
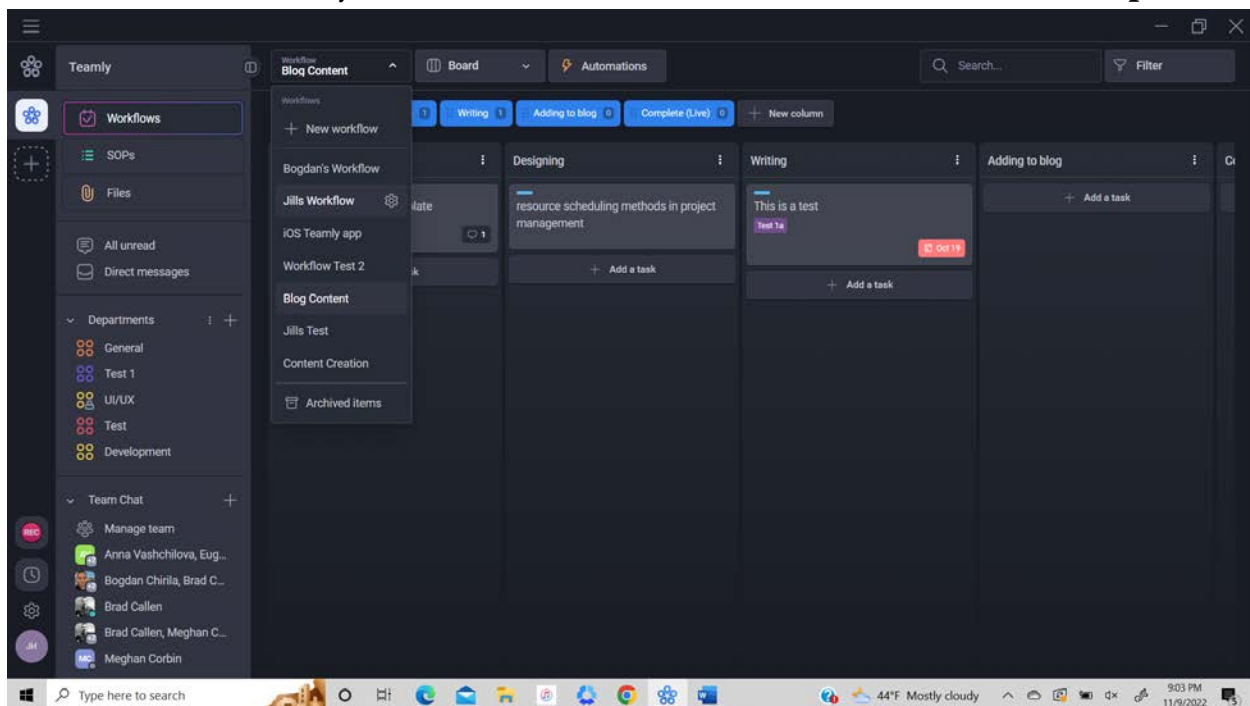
3. Click the **Automations button** in the top navigation.
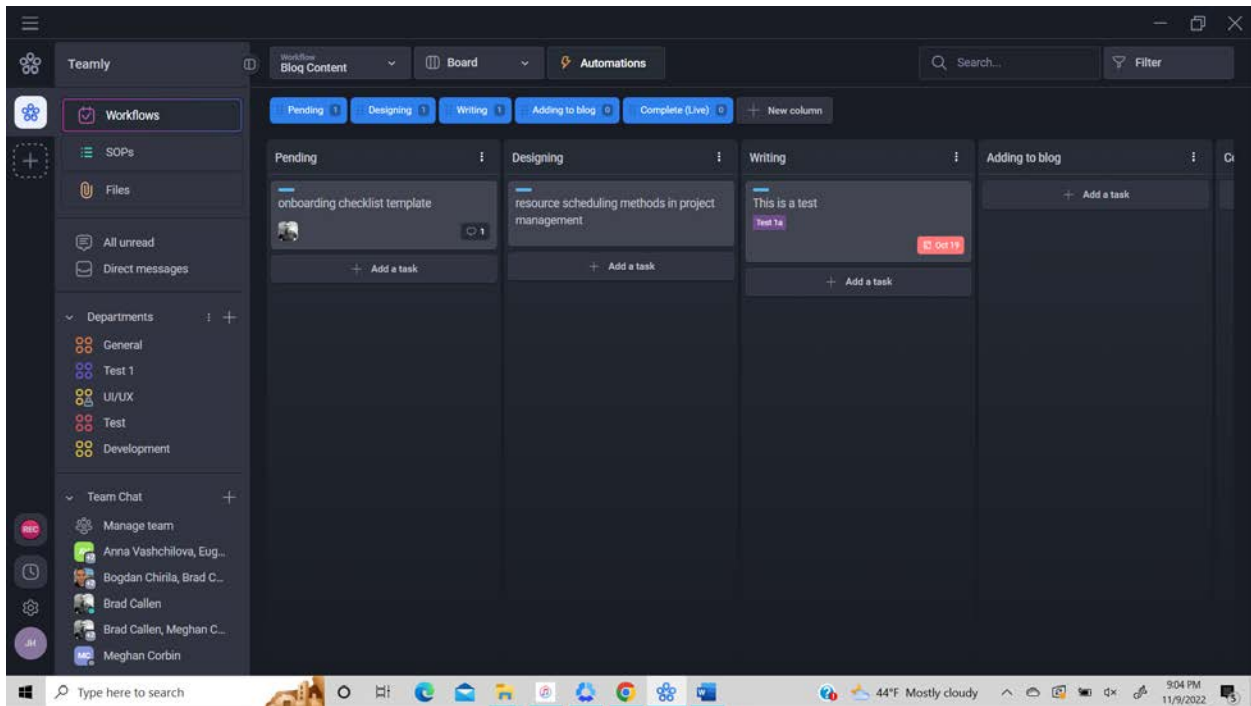
4. Click the **+ Create automation button**.
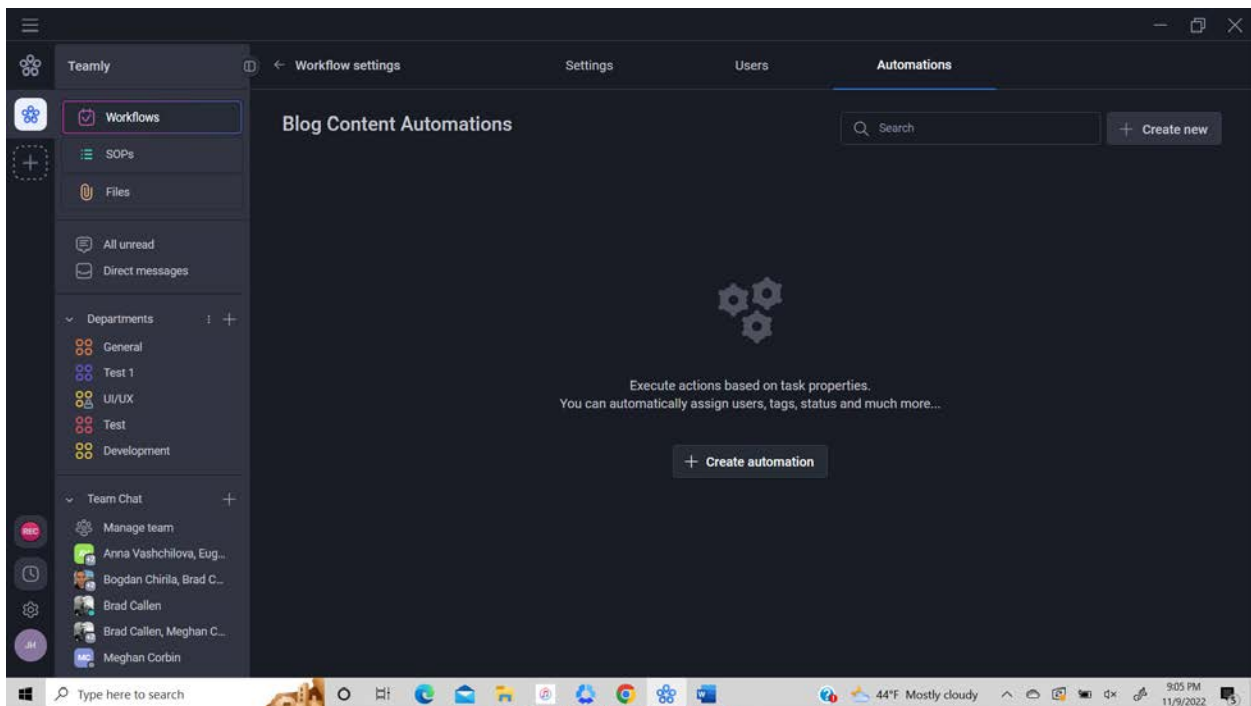
5. Click the text that says "New Automation," then enter the name of your automation.
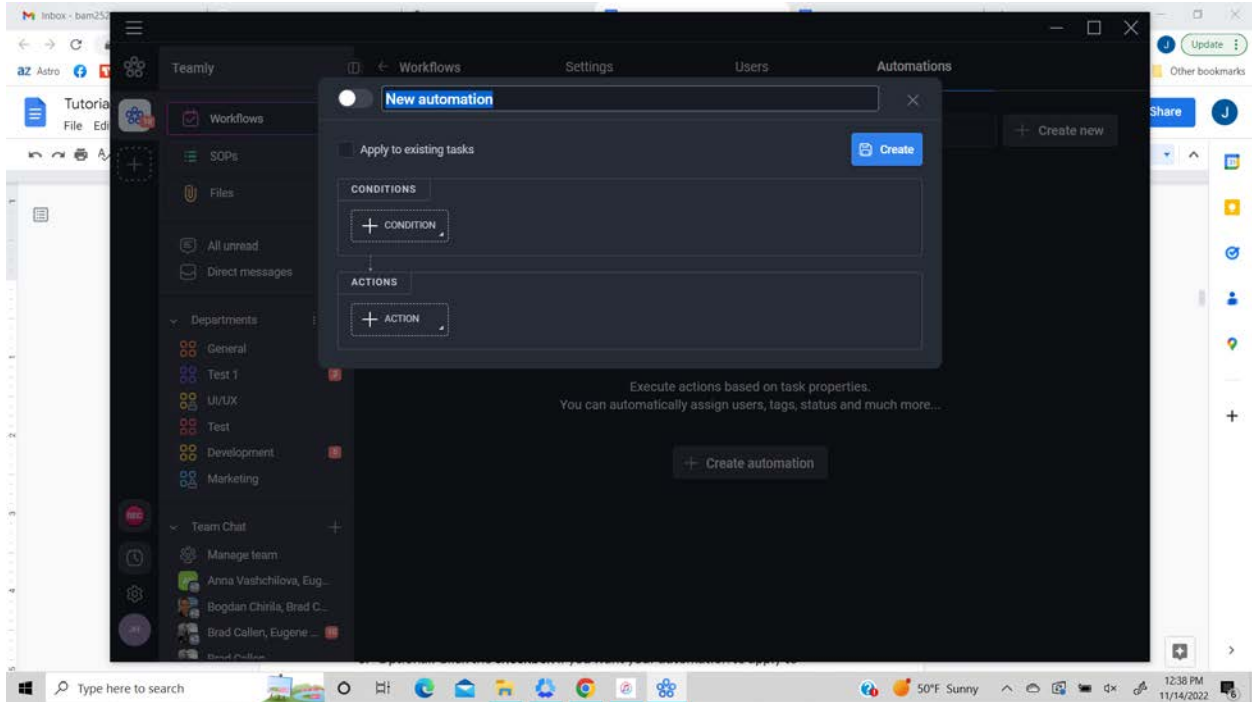
6. Click the **checkbox** if you want your automation to apply to existing Tasks. If you only want your automation to apply to new Tasks, leave the **checkbox** unchecked.
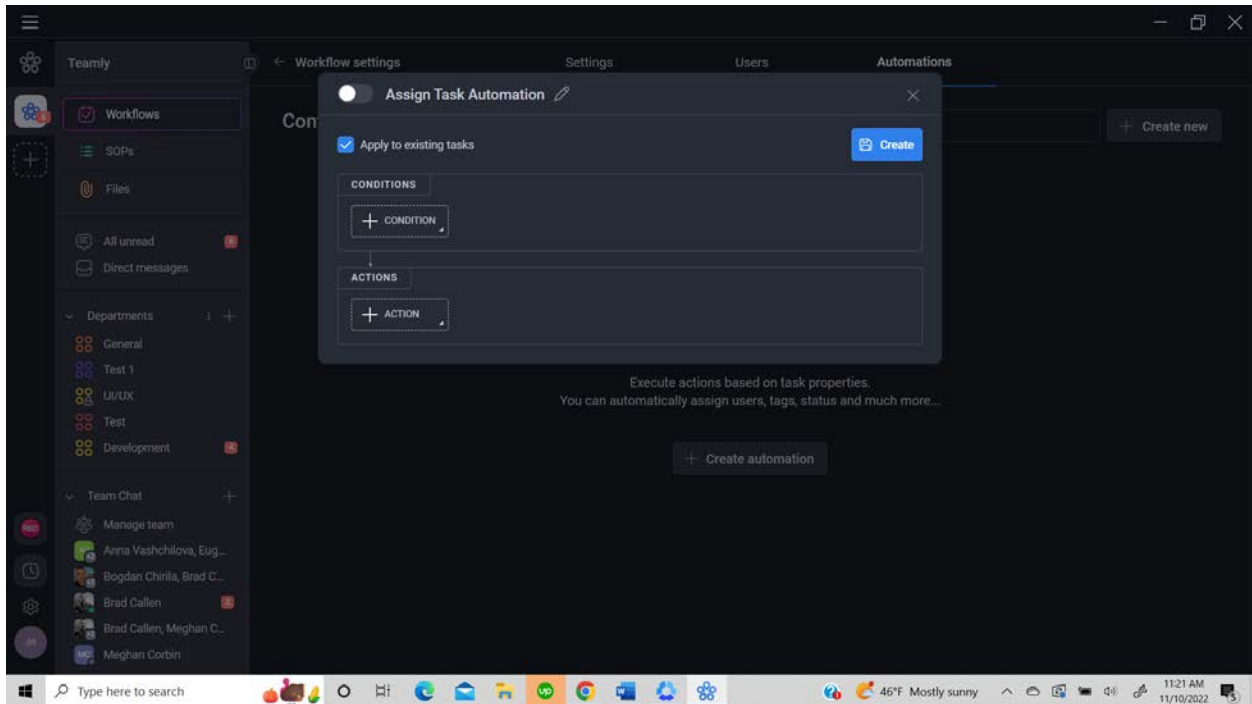
7. Click the + **Condition button**.
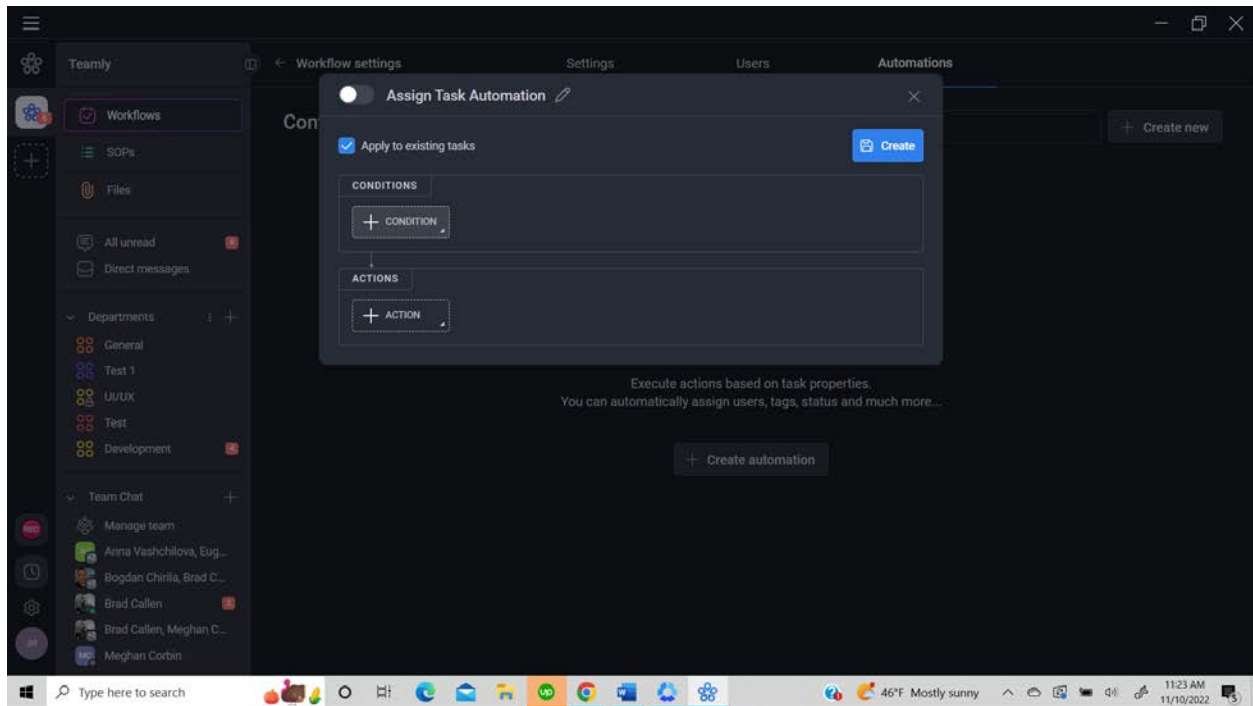
8. Create your IF condition by selecting from the **condition picklists**.
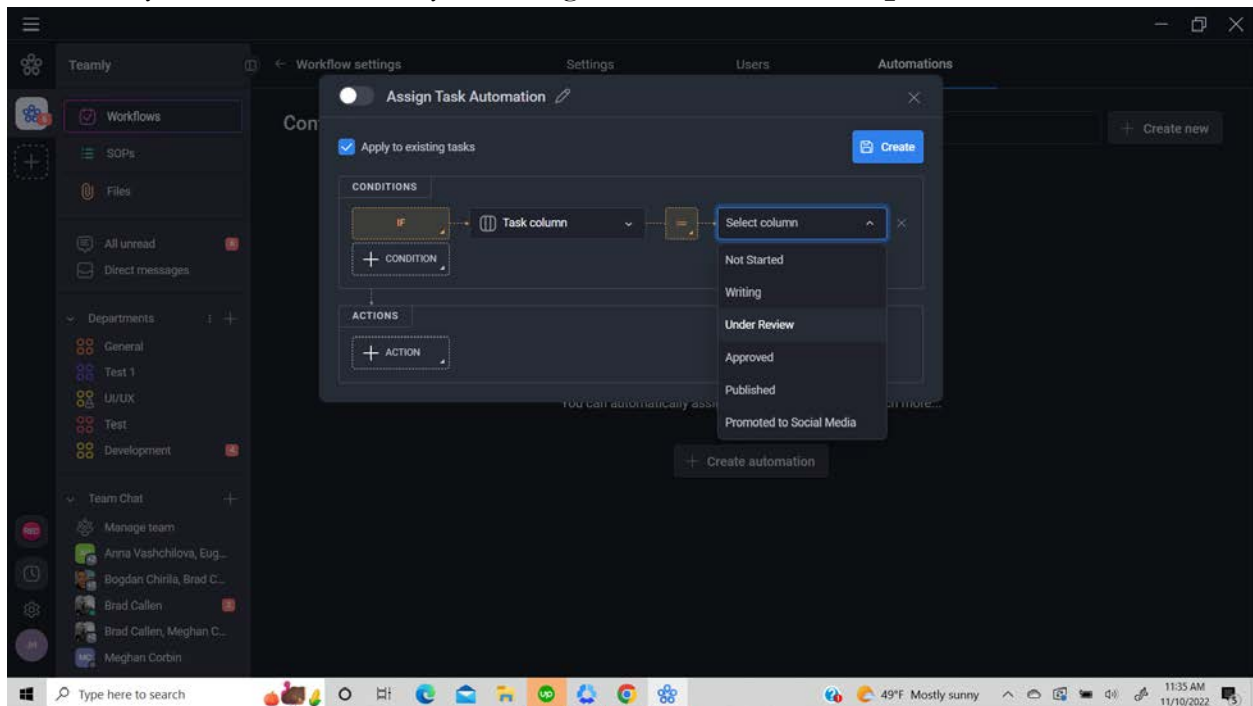
9. Click on the **+ Action button** to tell Teamly what to do when this condition is met.
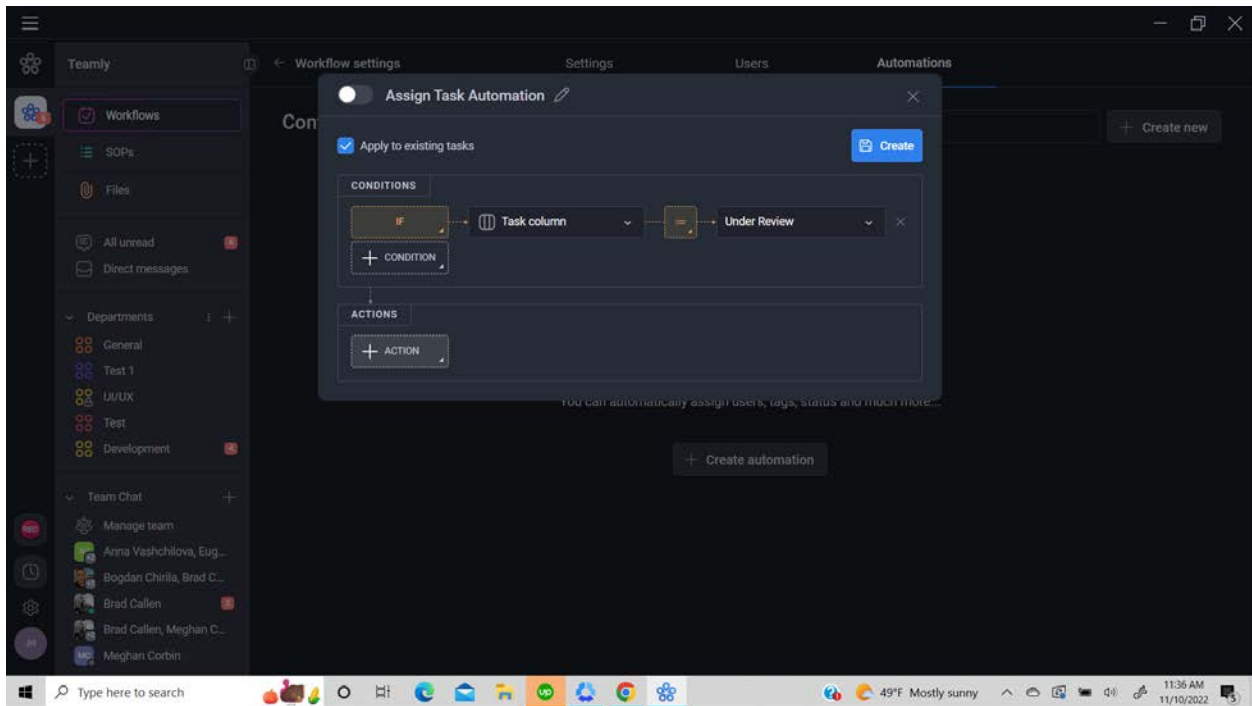
10. Enter the action Teamly should take by selecting from the **action picklists**.
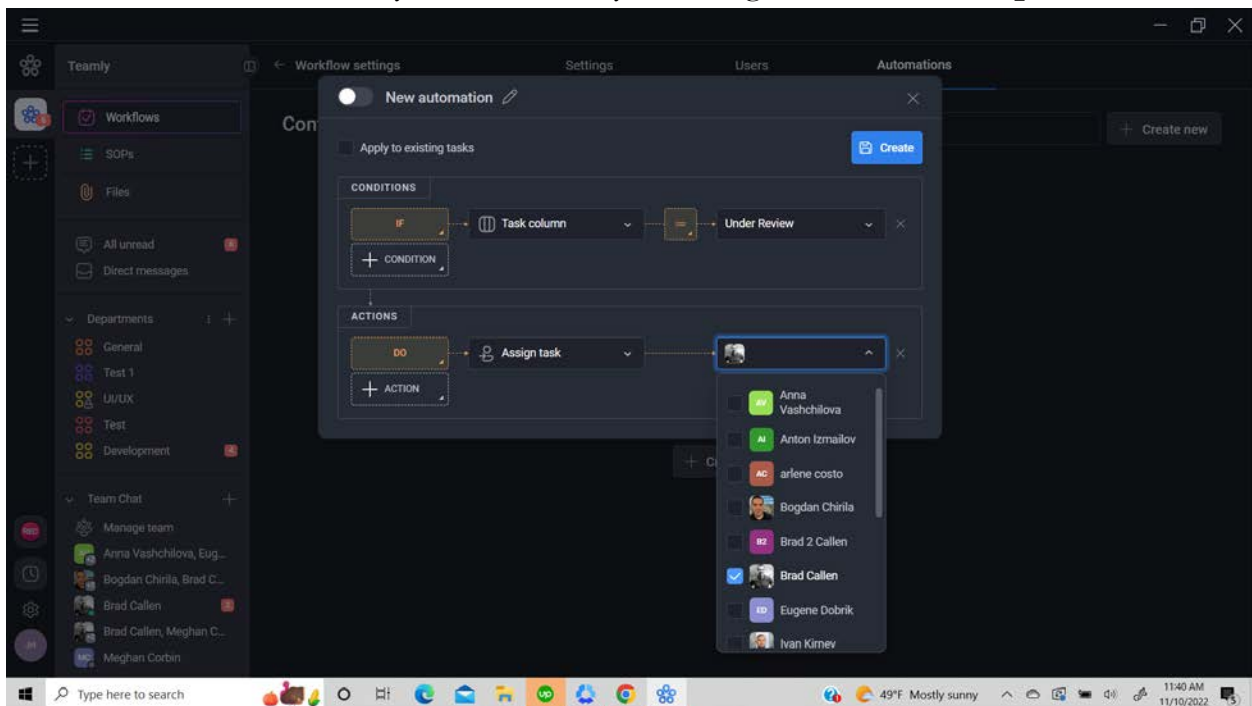
11. Toggle the **ON/OFF switch to** ON to immediately begin using the automation.
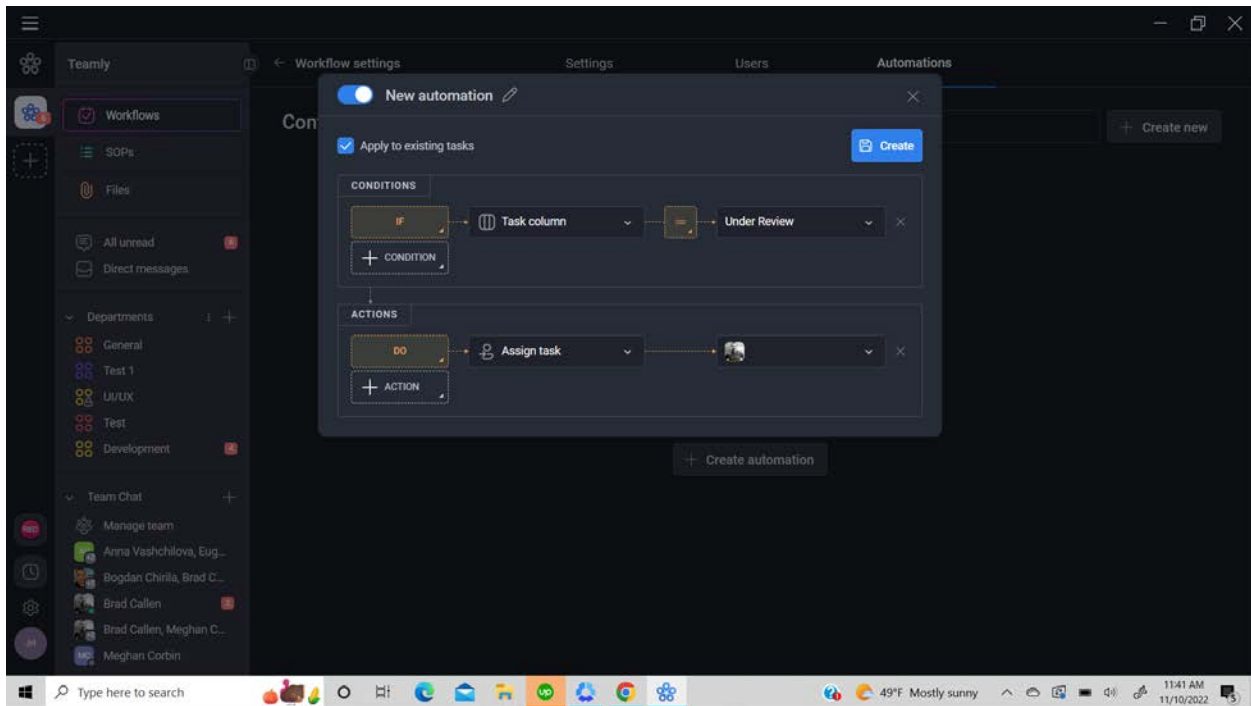
12. Click the **Create button** to finish creating the automation.
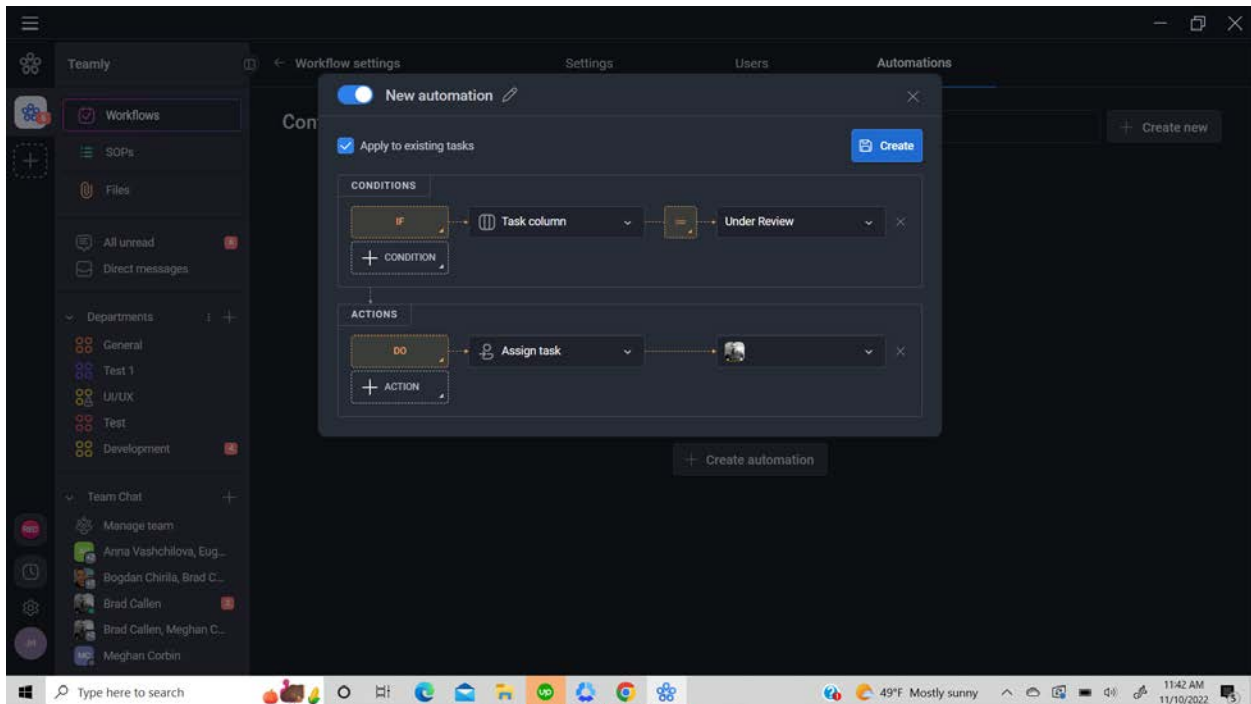
CHAPTER 4.
15 INNOVATIVE WAYS
TO USE KANBAN BOARDS
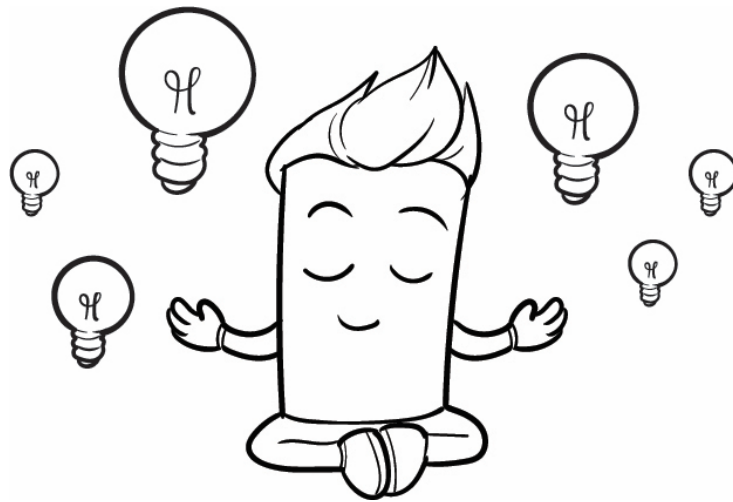
Kanban boards are incredibly versatile tools that can be used in a wide variety of contexts.

While they're most commonly employed in professional settings, they can also be used to accomplish personal objectives, such as planning a vacation, managing a home renovation, and even tracking weight loss … which is why when it comes to Kanban boards, the <u>only</u> limit is your imagination!

In this section, we'll look at 15 innovative ways you can use Kanban boards at work to fuel productivity, efficiency, and collaboration.

We'll also share links to pre-made templates you can use right inside Teamly, so you can immediately take advantage of these examples and incorporate them into your workflow.

Guaranteed that regardless of which industry you're in or what you're offering, there's a Teamly template here that will help your team improve collaboration, increase efficiency, and boost productivity.

INNOVATIVE USE #1:
MANAGING A SOFTWARE DEVELOPMENT PROJECT

One of the most popular ways to use Kanban boards is in the context of software development. The visual, real-time nature of a Kanban board makes it an ideal tool for tracking the progress of tasks like coding, testing, and deployment.

In a software development project, you might use columns to represent the different stages of a Task's progress, such as "Planning," "Designing," "Coding," and "Testing & Deployment."

When managing a software development project with Teamly, you can use <u>our pre-made template</u> specifically designed for software development that includes the mentioned columns, or you can create custom columns, labels, and workflows to match your team's specific needs.

By using a Kanban board to manage your software development project, you'll be able to establish the timeline and sequence of tasks needed to complete your project, while tracking your team's progress every step of the way!

INNOVATIVE USE #2:
PLAN AND EXECUTE A MARKETING CAMPAIGN

Marketing campaigns can be complex, with many different moving parts that need to be coordinated and tracked. Fortunately, Kanban boards are a great tool for organizing and prioritizing campaign Tasks, such as creating social media content, running ad campaigns, and analyzing results.

When planning a marketing campaign with Teamly, you can use our Teamly template specifically designed for product launches, brand launches, and new marketing campaigns, or you can create your own custom workflow.

By using a Kanban board to plan your marketing campaign, you'll be able to see the state of your project at a glance and quickly identify any bottlenecks or inefficiencies in your workflow. You'll also be able to leave feedback right inside Teamly Tasks to ensure that everyone on your team is on the same page.

INNOVATIVE USE #3:
ORGANIZING A CONFERENCE OR EVENT

Organizing an event can be challenging, since there are lots of different elements that need to be managed, such as booking the venue, arranging catering, and of course, promoting the event. Fortunately, Kanban boards to the rescue!

With a Kanban board, you can create custom columns to represent the different stages of the Tasks, or you can use our Event Planning template, which includes "Planning," "Venue & Vendors," "Promoting," "Executing," and "Follow Up" columns.

By using a Kanban board, you can visualize the Tasks required to organize your event, while easily collaborating with your team on all of the event's details. As a result, you can rest easy, knowing your event will go off without a hitch!

INNOVATIVE USE #4:
LAUNCHING A NEW PRODUCT

Bringing a new product to market can be a complex and demanding process that involves many different stages, from prototyping and testing to manufacturing and distribution. Happily, a Kanban board is ideal for staying on top of it all.

For instance, you can use a Kanban board with columns representing the different stages of the Tasks, such as "Research & Development," "Design & Prototype," "Testing & Quality Control," "Manufacturing," and "Launch Preparedness." To simplify the process, you can use our Teamly template or if you want, you can create a Kanban board with custom columns.

By using a Kanban board for a new product launch, you can track launch progress and make sure everything is on schedule, while improving visibility so team members can identify bottlenecks at a glance.

With increased efficiency and better collaboration, you'll find it even easier to launch your new product on time and within budget!

INNOVATIVE USE #5:
MANAGING A TEAM OF FREELANCERS OR CONTRACTORS

When working with a team of freelancers or contractors, you want to stay on top of the work you've assigned … without feeling like you have to micromanage everyone to do it! Enter Kanban boards. A Kanban board makes it easy to assign Tasks, track progress, and communicate with contractors.

Simply create columns to represent the different stages of Tasks, such as "Assigned," "In Progress," "For Review," and "Completed,'' or save time by using the Team Management template we've created.

To stay on top of your schedule, add due dates to Tasks and use a priority label, so freelancers know how to prioritize their time when they're working on multiple assignments.

By following these simple steps, you'll find it easy to manage your team of freelancers, no matter where they're located or what time zone they're in!

INNOVATIVE USE #6:
PLANNING A BOOK, ONLINE COURSE, OR CREATIVE PROJECT

When working on a creative project, it can be all too easy to become overwhelmed and get bogged down by the myriad details you need to keep track of … which is one reason Kanban boards are so valuable. A Kanban board is the perfect tool for organizing and prioritizing creative Tasks, such as writing, editing, and design.

When planning a book, lead magnet, online course, or other type of creative project, you can create columns to represent different stages in your workflow. For example, in the case of a book, you might decide to use our Book Creation template which has columns like "Research & Outline," "Writing," "Editing," and "Design & Production."

And if you were creating an online course, you might create a Kanban board with our eCourse Launch template which has columns for "Planning," "Creating," "Branding," "Selling," "Launching," and "Post-Launch" activities.

By using a Kanban board for your creative project, you can easily track and manage all the various pieces parts that go into a successful creative endeavor … so your final creation is a big hit!

INNOVATIVE USE #7:
MANAGING A PERSONAL TASK LIST

Organization is the Holy Grail when it comes to time management and personal productivity. Get this wrong, and you'll quickly find yourself overwhelmed by a seemingly endless to-do list. But, get it right (using a Kanban board, of course) and you can tackle your tasks like a boss. Bam!

When managing your personal Task list, you can create columns to represent when you'll work on your Tasks, such as "Today," "This Week," and "This Month." To make sure you're focusing on what's most important, you can also indicate the priority of each Task and optionally set deadlines. When you complete your Tasks, simply archive them to keep your Kanban board looking neat.

If you're chomping at the bit to get started, our Personal Productivity Planner template is the way to go. Or, if you'd rather create your own customized Kanban board, that's always an option too.

By using a Kanban board for managing your personal Task list, you'll easily be able to keep track of everything you have on your plate, such as to-dos, errands, hobbies, and appointments. And with that kinda organization, higher productivity can't be far behind!

INNOVATIVE USE #8
MANAGING A CUSTOMER SUPPORT TEAM

When managing a customer support team, you naturally want to make sure that customer inquiries and requests are handled promptly and efficiently. Fortunately, a Kanban board is a great tool for assigning and tracking customer support Tasks.

To create your board, consider using columns to represent the different stages of support tickets, such as "New," "Investigating," "Resolving," "Awaiting Input," and "Resolved." To ensure that support tickets are handled in a timely manner, you can also indicate the priority of a Task, assign specific team members, and group Tasks by category using labels.

For your convenience, we've created a Support Ticket Management template that uses the mentioned columns, or if you like, you can create your own custom board in Teamly.

By using a Kanban board to manage your customer support team, you'll be able to see the state of customer inquiries and requests at a glance and quickly identify any bottlenecks or inefficiencies in your workflow.

You'll also be able to ensure that customer support tickets are handled promptly and efficiently, which helps to improve customer satisfaction and retention. Talk about a win-win!

INNOVATIVE USE #9:
ONBOARDING NEW EMPLOYEES

Onboarding new employees can be time-consuming, especially when you're dealing with multiple new hires at once. Fortunately, with a Kanban board, it's super easy to create a simple, repeatable onboarding process that you can use for each new hire. Even better, you can add self-directed activities to the Kanban board, so your new hires take ownership of the onboarding process.

In Teamly, we offer two different onboarding templates you can use. The first is our 30-60-90 Day Onboarding template. In this template, you'll add onboarding Tasks for your new hires to perform on day 1, week 1, and of course, at the 30-, 60-, and 90-day employment mark.

By contrast, our Onboarding Management template uses columns to represent different stages of onboarding, such as "New Hire Paperwork," "Responsibilities & Training," and "Assessment & Review."

Regardless of whether you use one of our templates or create your own custom board, you'll find that Kanban boards are the ideal way to standardize a successful onboarding experience for your new hires.

As a result, creating a Kanban board may just be the easiest thing you can do to improve employee retention and performance -- with next-to-no effort!

INNOVATIVE USE #10:
MANAGING A SALES PIPELINE

Managing a sales pipeline is crucial for business success, as it allows you to track leads and deals from initial contact to close. And the best way to manage that sales pipeline? With a Kanban board, of course! A Kanban board is an incredibly effective tool for organizing and tracking the progress of leads throughout your sales process.

For instance, when managing a sales pipeline, you can create custom columns to represent the different stages of the sales process, like "Contacted," "Qualified," "Nurturing," "Wins," and "Losses." Or if you want, rather than building a board from scratch, you can save time with our CRM Pipeline template.

By using a Kanban board to manage your sales pipeline, you'll be able to see the status of leads at a glance, while making sure leads are moving through the pipeline efficiently … making it that much easier for you to close those deals!

INNOVATIVE USE #11:
ORGANIZING AND MANAGING A CONTENT CREATION TEAM

Managing a content creation team can be a challenge, especially when you have many team members working on multiple projects simultaneously. Fortunately, a Kanban board is a great way to organize, track, and manage your writing, editing, and design tasks.

For example, when managing a content creation team, you can create custom columns to represent your workflow, such as "Writing," "Design," "Approved," and "Published." Or, if you'd rather not customize, just use our Content Management template to get started immediately.

Regardless of which option you choose, a Kanban board provides content management teams with full transparency. As a result, team members know what their peers are working on and which stage of the workflow Tasks are in.

Not only does this information promote team cohesion and synergy, but it also helps teams produce high-quality content and meet deadlines!

INNOVATIVE USE #12:
PLANNING AND EXECUTING AN EMAIL MARKETING CAMPAIGN

Email marketing campaigns are an important way for businesses to reach out to their customers and prospects. Fortunately, Kanban boards are a great tool for organizing and prioritizing campaign Tasks such as creating content, designing templates, and analyzing results.

When planning and executing an email marketing campaign with Teamly, you can use our Email Marketing Campaign template which includes columns like "Planning," "Content Creation, "Design," and "Analysis." Alternatively, you can create your own custom workflow.

By using a Kanban board to plan your email marketing campaign, you'll be able to see the state of your project at a glance and quickly identify any inefficiencies in your workflow. You'll also be able to leave feedback right inside Teamly Tasks to ensure that everyone on your team is on the same page.

Bottom line? With superior management capabilities, your email marketing campaign will be better positioned to meet your engagement, conversion, and revenue objectives!

INNOVATIVE USE #13:
ORGANIZING AND MANAGING A REMOTE DESIGN TEAM

When working with a remote design team, you need a way to organize and track multiple projects going on simultaneously, as well as the myriad of tasks that go into designing logos, websites, and marketing materials. Enter Kanban boards! A Kanban board makes it easy to assign tasks, track progress, and communicate with your team.

Simply create columns to represent the different stages of Tasks, such as "Concept Development," "Design," "Revision," and "Approval," or save time by using the Remote Design Team Management template we've created.

To stay on top of your schedule, add due dates to Tasks and use priority labels, so team members know how to prioritize their time when they're working on multiple assignments. You can also enter design feedback and questions right inside Tasks to facilitate team communication.

By following these simple steps, you'll find it easy to manage your remote design team, even when working in different time zones. Even better, your team members will have the perfect management tool to assist them in producing high-quality designs that meet your requirements!

INNOVATIVE USE #14:
RUNNING A REMOTE TEAM MEETING

If you want to run a remote team meeting with ease, Kanban boards are about to become your new best friend! With a Kanban board, it's a breeze to organize and track the tasks involved in running a remote team meeting, such as creating an agenda, assigning action items, and tracking progress on tasks.

When running a remote team meeting, you can create custom columns to represent the different stages of the meeting, such as "Agenda Development," "Meeting Preparation," "Meeting," and "Follow Up." Alternatively, you can use our Remote Team Meetings template or Meeting Agenda template to prepare for your meeting, depending on which style you prefer.

By using a Kanban board, you can plan your meeting agenda, while easily assigning action items to team members and tracking progress. As a result, you can rest easy, knowing your meeting objectives will be met!

INNOVATIVE USE #15:
MANAGING A SOCIAL MEDIA STRATEGY

A social media strategy can help businesses build brand awareness, increase customer engagement, and drive sales. Yet managing a social media strategy can be a challenge if you don't have a good system in place. Fortunately, a Kanban board is a great way to manage your social media-related Tasks, such as creating content, obtaining approvals, and publishing posts.

With a social media strategy, you might use columns to represent the different stages of a Task's progress, such as "Ideas," "To Do," "Content," "Graphics," "Needs Approval," "Needs Revisions," and "Published."

When managing a social media strategy with Teamly, you can use our pre-made template or you can create custom columns, labels, and workflows to match your team's specific needs.

By using a Kanban board to manage your social media strategy, you'll be able to see the state of your social media efforts at a glance. You'll also be able to ensure that your social media strategy is on track to meet your objectives of building brand awareness, increasing customer engagement, and of course, driving sales!

CHAPTER 5.
KANBAN BOARD BEST PRACTICES
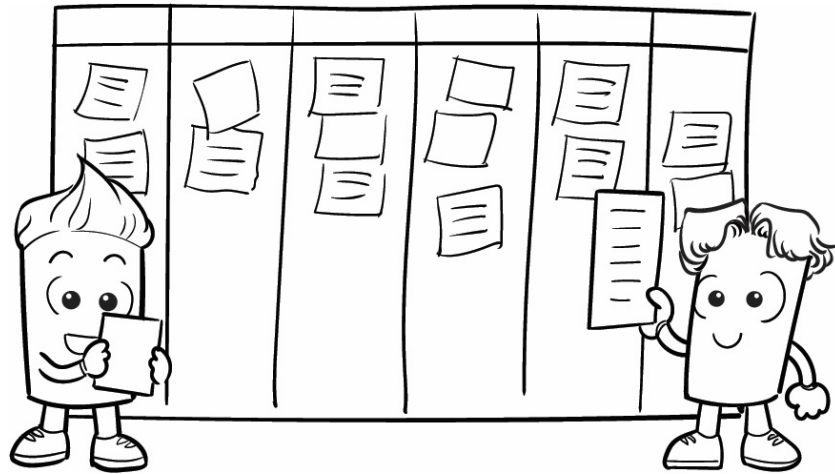
Kanban boards can be a powerful tool for managing projects and teams, but to get the most out of them, it's important to follow some best practices.

Here are 10 tips to help you optimize your Kanban boards:

1. Keep your Kanban board simple.

You want your Kanban board to be easy to understand and navigate, which is why you'll want to avoid adding too many columns, labels, and other elements that can ratchet up its complexity. A simple board is not only highly effective, but it's also easier for team members to grasp quickly and use correctly.

2. Designate a board owner.

You'll want to designate a board owner for each Kanban board in your workspace. Board owners are responsible for maintaining the board by adding and removing Tasks as necessary, so the board is kept up-to-date, accurate, and relevant.

Additionally, a board owner can be the go-to person for any questions or concerns related to the board, and they can also be responsible for training new team members on using the board. Having a designated board ensures that the board is being used consistently, while improving your team's overall efficiency.

3. Establish policies for shared boards.

Who's responsible for moving Tasks and when do they get moved? Answering these questions will be important because it establishes a shared understanding among team members about how your Kanban board should be used.

As a result, team members will know the status of tasks and find it easier to anticipate what needs to be done next. This understanding not only helps to improve collaboration among team members, but also ensures that work stays on track and is completed on time.

4. Save time with templates.

Templates save teams time, while also making it easier to get started with Kanban boards. Even better, by selecting templates from <u>Teamly's template library</u>, you'll be able to set up your own boards quickly and efficiently, while making sure you're following best practices.

5. Prioritize tasks.

When creating a new Task, be sure to give it a priority. For instance, in Teamly, Tasks can be labeled Low, Medium, or High priority. By giving Tasks a priority label, team members will know how to prioritize their time, so the team's most important Tasks are completed first.

6. Categorize Tasks with labels.

Labels are a powerful tool for categorizing Tasks, and they can be used to accomplish a variety of different aims. For example, you might use labels to

indicate the status of a task, such as "Approved," "Awaiting Client Feedback," or "Needs Edits."

Alternatively, you might use labels to indicate the type of Task, such as "Bug," "Feature," or "Maintenance," so team members understand the nature of the Task and can decide how they want to approach it.

Labels can also be used to indicate the area of work, such as "Frontend," "Backend," or "Support." As a result, the team understands the scope of the Task and subsequently, can direct it to the team member most capable of handling it.

As you can see, labels are a great way to communicate helpful information about Tasks, which is why they're a no-brainer for any best practices list!

7. Limit work in progress.

To avoid overload, team members should limit the number of tasks they're working on at any one time. Why? Because research overwhelmingly shows that limiting the number of Tasks in a team's "Work in Progress" (WIP) column significantly increases productivity.

For instance, one study conducted by the Lean Enterprise Institute found that when teams implement WIP limits, they reduce two of the biggest productivity killers, multitasking and context switching. As a result, they increase their productivity by 25-50%!

8. Update Tasks in real-time.

Updating a Kanban board in real-time allows team members to have an accurate understanding of the status and progress of Tasks at all times. As a result, team members can make more informed decisions about how to allocate resources and prioritize their work.

In the absence of real-time updates, the information on the Kanban board may become outdated or inaccurate, which can lead to poor decision-making and wasted resources.

Worse, team members may lack a clear understanding of the tasks that are being worked on, which can lead to misunderstandings, confusion, and mistrust.

9. Automate repetitive tasks.

Automating repetitive tasks is a great way to improve the overall efficiency and productivity of your team. For example, you can automate the process of moving Tasks between columns on the Kanban board. Alternatively, you might automate the process of updating the status of Tasks.

Automations like these ensure that the information on the Kanban board is accurate and up-to-date. Plus, by eliminating the need for manual intervention, teams reduce the likelihood of human error and increase the consistency and accuracy of the workflow process.

10. Continuously improve.

Continuously review your processes and make adjustments as needed. This is important because over time, you may find new ways to maximize your team's efficiency.

By periodically reviewing and improving your workflows, you'll always get the most out of your Kanban boards and the Teamly software. Plus, you'll be able to identify ways to work more efficiently and effectively, so your team not only meets its goals, but exceeds them!

By following these best practices, you'll be able to optimize your Kanban boards, improve your workflows, and boost your team's productivity!

CHAPTER 6.
CONCLUSION

In this guide, we've covered the basics of Kanban boards, shown you how to set them up, and explained how they can be used to improve project management, team efficiency, and cost savings.

We've also shown you 15 innovative ways that Kanban boards can be used for a variety of different projects, from managing a software development project to planning a marketing campaign and more.

And of course, you've learned 10 best practices you can use to optimize your Kanban boards and boost your team's productivity.

Now it's time to put your newfound knowledge into action!

With Teamly's Kanban boards, you'll be able to streamline your workflow, collaborate more effectively, and improve your project management.

So don't wait, start using Teamly's Kanban boards today and discover for yourself how much more efficiently your team operates with Teamly.

Thanks for reading, we're looking forward to hearing about the great results you get with Teamly's Kanban boards!