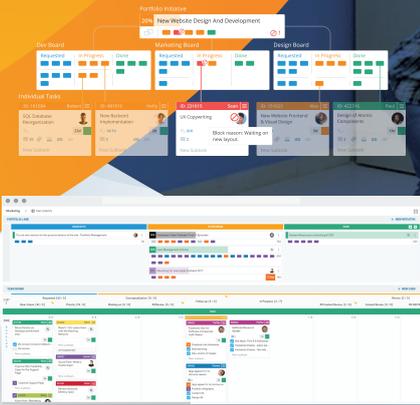




CASE STUDY | JERONIMO PALACIOS AND ASSOCIATES

# Kanbanizing the Lean and Agile Consulting for optimal results



## Jerónimo Palacios & ASSOCIATES

### Introduction

Jerónimo Palacios & Associates are leaders in Training of Agile Methodologies, especially Scrum and Kanban. In their training offer, apart from the certified Scrum and Kanban training, they also have Management 3.0 and workshops on product management, graphic facilitation and work management techniques. They offer open courses and also in-company courses for those companies that prefer to take them privately. They complement their offer with consulting services to companies, where they accompany the client in their transformation, and in the implementation of agile methodologies, a complex process in which they ensure that the value remains within the company, thus ensuring that the process does not end when the trainers leave, but that the company follows its own path within this methodology.

As you can imagine, it was difficult to manage so many activities and clients if there is no general vision. Before Kanbanize, everyone used their own work management tool. As a team, they used the calendar, physical agendas (planners) or the mail to organize themselves as a group. We are proud to present their case because our partners at Jerónimo Palacios & Associates are truly advanced users of Kanbanize. Let's see what problems have been resolved in their company.

### Industry

Consulting

### Use Case

Project Management

### Company Objectives

- Improve efficiency through better visualization
- Map their process as accurately as possible and establish clear work breakdown structure
- Gather reliable metrics to analyze workflow efficiency
- Ensure better communication

### Key Results

- Better Flow Tracking
- Real-Time Visualization
- Knowledge Sharing
- Managing work from anywhere

## Objectives and Use Case

When they decided to implement Kanbanize, they had the strategic objective to ensure sustainable growth as a business. They wanted to be able to manage the work in a comfortable and transparent way for the entire organization and to improve their way of working as a team and company.

Their goal on the team level was to grow as a unit with a common goal and to be aware of the work each one has in order to help each other or make better decisions and prioritization.

In terms of internal work management, they have a well-organized coordination process. They sync every Friday at their weekly meeting. They also make reviews every few days to ensure that they are moving forward and that no one is uninformed. The problem is that not all team members are always present and they have to send reminders by e-mail or add events to the company calendar.

With Kanbanize they are organizing the training preparation, the work for clients, the administration, the process of publication of materials, etc. Our Kanban software helps them improve internal coordination, work more quickly and maintain a true Kanban process. Kanbanize allows them to achieve this by implementing work-in-progress limits (WIP limits), visualizing work on various levels, and different workflows.

They started using Kanbanize by recommendation. Jerónimo knew the tool and usually recommends it during the training of the Lean Kanban University. When the company grew, they discovered that they needed another system to organize that was easier to use and provided a better overview of the whole work in progress. That's how they decided to try Kanbanize and thus be able to give feedback to their students and clients with greater knowledge of the tool.

### Software Criteria Fulfilled

- ☑ Clear visualization and real-time updates
- ☑ Flexible workflows; ability to have various swimlane structures within the same board
- ☑ Highly customizable card and board views
- ☑ User-friendly interface and easy to modify
- ☑ Provides actual project status on all levels
- ☑ Accessible from various locations at the same time, allowing remote teams to sync
- ☑ Flow analytics

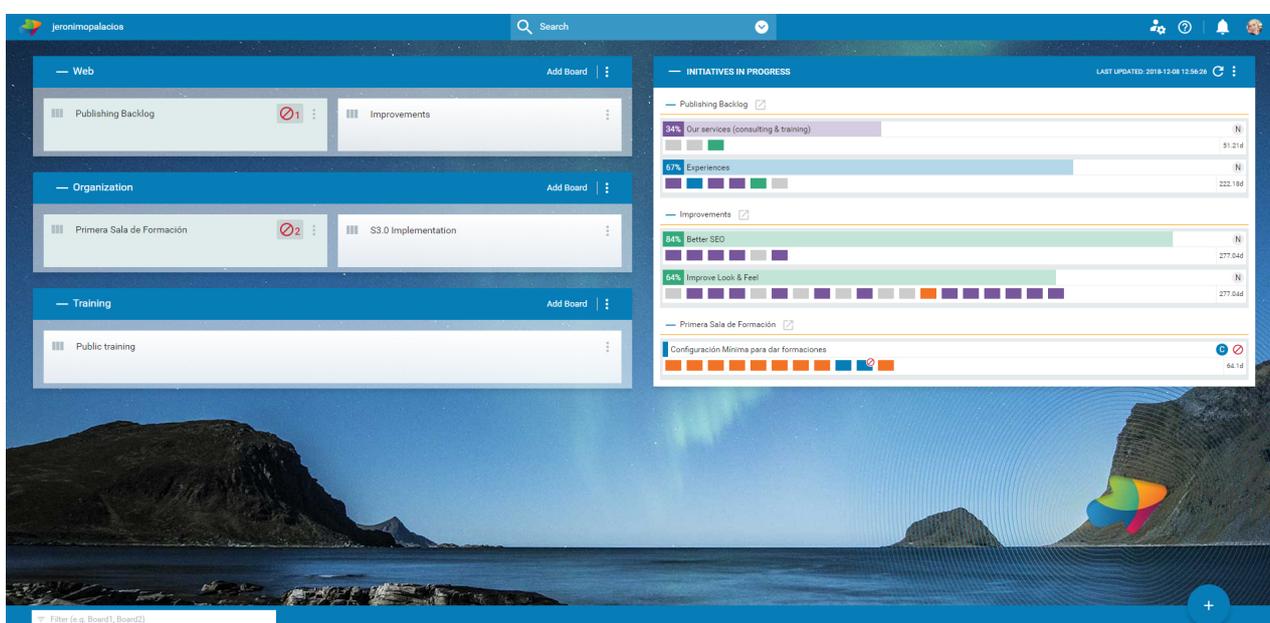
## Process Structure in Kanbanize

The departments are rather circles of action as in Sociocracy. Currently, each circle belongs to a specific service and has at least one Kanban board. All the people who work at Jerónimo Palacios & Associates have access to all the boards. They have 3 service sections and 5 boards.

The team started in the Training and Web circles and now they have added the Organization one which includes also administration and human resources. We thank them for sharing the structure of their boards with us! We start by looking at the Dashboard (Fig.1) - the first thing you see when you enter your Kanbanize account.

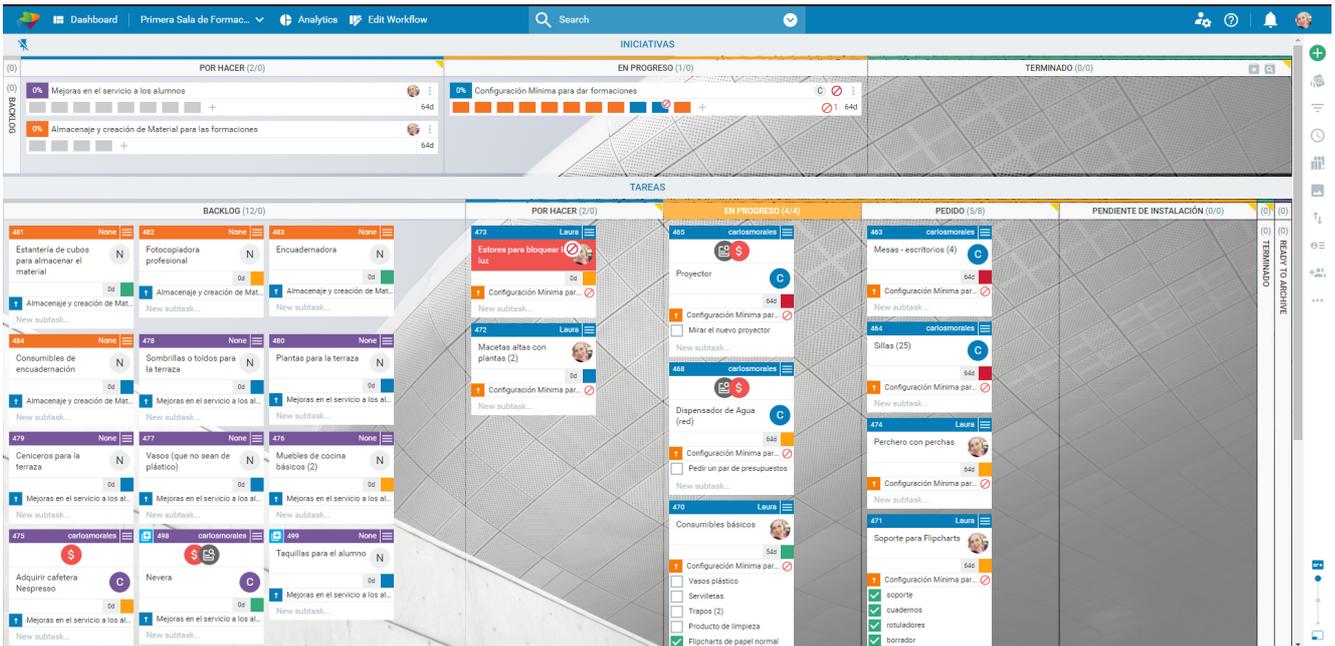
For now, they have three projects - Web, Organization and Training. As true experts in Lean and Kanban, they carefully manage their initiatives at the portfolio level. They are displayed on the main page so they do not lose anything.

Fig.1 Dashboard



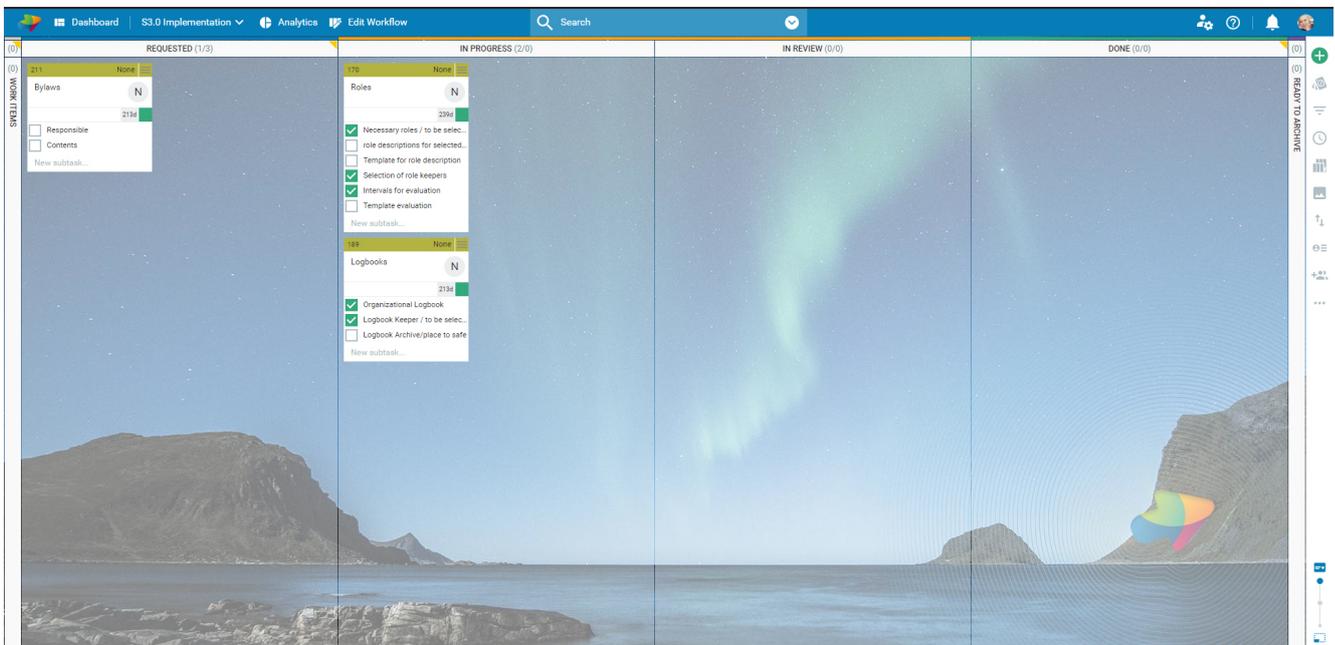
The structure of each workflow depends on the board. We will now show some to see the differences. The first (in Fig. 2) is one of the newest in the organization. In this, they work together with the administration to establish their office in Madrid. The blocked tasks and the initiatives to which they remain are displayed in a glance.

Fig.2 Training Organization Board



The second board (in Fig. 3) is one of the first jobs they did in Kanbanize, to configure their culture, manual and rules of Sociocracy 3.0.

Fig.3 S3.0 Implementation Board



As the most frequent blockers, they identified the columns waiting on an external party. Knowing that allows them to plan better and achieve greater predictability.

## Problems solved with Kanbanize

Although they always worked in an agile way, sometimes the team found problems that only the right software could solve.

- Occasionally, some **tasks were delayed** due to internal or external dependencies causing blockages. In other cases, there are less important tasks that remain unassigned and are not carried out. In addition, they needed to see the urgent ones more quickly in order to respond without causing delays.

With Kanbanize they visualize all the phases that cause the delay. They can mark queues and activity columns to calculate the cycle time correctly. The possibility to include a deadline and establish a business rule that reminds them of the task eliminates the possibility of forgetting something.

- They were worried about the stress caused by the fact that the completion of a task **depended solely on the memory of the person in charge** and each one of them is responsible for many tasks. That's why they needed to automate the process and eliminate that factor.

Now when they have the history of each card, the business rules to automate notifications and the WIP limits to prevent overloading of team members, that danger no longer exists. With Kanbanize they have their process rationalized and execution does not depend solely on someone's memory.

- Their previous form of management didn't allow them to have an **overview of everything that is being worked on at any given time**.

With the implementation of Portfolio Kanban, the company gains visibility of the work of all the teams and all the projects in progress. That helps them in planning and evaluating performance.

- **Changes in priorities that were not made explicit** were also part of the problem.

In Kanbanize it is very easy to mark priority. We can see in Fig. 1 that they are using that functionality actively. The rectangle below the assigned photo is green, yellow or red, indicating priority as low, normal or high.

- Another problem was that **the team is distributed**. Part of the team is in Granada (southern Spain) and another part in Madrid. Also, due to their type of work, they often have to travel individually and the communication of the team is more difficult if it is not through a digital tool.

Everyone has access to the boards at each moment of each place, which greatly facilitates communication and exchange of data.

## Solution

When introducing Kanbanize, in Jerónimo Palacios & Associates they needed to implement some changes to the process as well. They gave access to all employees to the tool and all the boards are open (except personal ones if they have them). Also, they implemented initiatives, allowing them to see the progress of all projects in a glance.

They try to implement everything they know about Kanban and Kanbanize allows them to do everything from a pull system, a series of policies to build a real flow for the work up to WIP limits per column.

When they describe the most useful features, they stress:

- Portfolio implementation and the ability to assign some tasks to initiatives with a business overview turned out to be very beneficial.
- The possibility of adding subtasks in the form of a checklist.
- The visibility of the blockages in the boards from the dashboard.

As they work on many initiatives of different types, the opportunity to link cards both horizontally and vertically becomes a big differentiator. They are fluent in their training and consulting activities without depending on the personal capacity of the employees or the good memory of someone. In addition, these improvements are shared with all team members, even when they are not in the same city.

## Results

With the use of Kanbanize in Jerónimo Palacios & Associates, they achieved transparency of work on a team level in the different circles and also on the company level. They managed to automate most of the process and gain predictability.

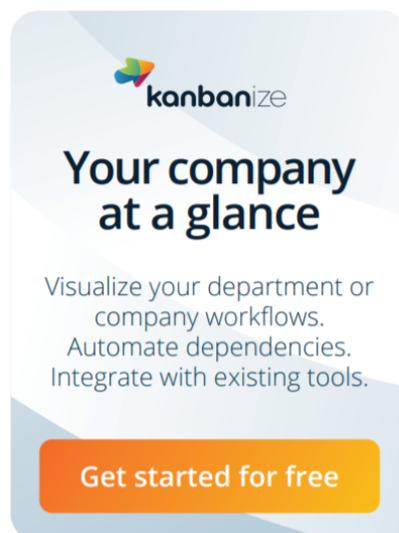
Transparency and team participation have improved beyond the production circles. Right now the business unit members also use it to help and contribute to the customer service projects. And at the same time, it has helped them to realize that they are not taking advantage of Kanbanize to its full potential and they want to improve their knowledge of the product to achieve even more. This proved to be an impulse to further pursue a Kaizen culture of continuous improvement.

The main practical benefits that stand out are:

- The ability to update progress anywhere and at any time.
- To directly involve management in the team discussion regarding a specific task.
- The possibility of discovering blockages and visualizing dependencies.

## Final Thoughts

In the end, it would be useful to mention that it is a recognition for us to be the selection of Jerónimo Palacios & Associates because they are one of the most outstanding Lean / Agile experts in Spain. It is a pleasure to be able to help the Kanban consultants to implement Kanban completely in their organization. The results they have shown are an example of consulting firms also needing powerful tools to manage their work.

A promotional card for Kanbanize. At the top left is the Kanbanize logo. Below it, the text "Your company at a glance" is written in a large, bold, black font. Underneath, three lines of smaller text describe the tool's capabilities: "Visualize your department or company workflows.", "Automate dependencies.", and "Integrate with existing tools." At the bottom of the card is a prominent orange button with the text "Get started for free" in white.