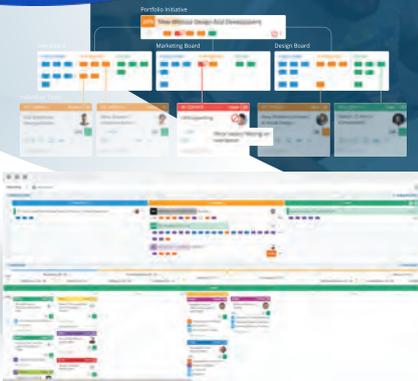


True Lean Company Meets a True Kanban Software

End-to-end Portfolio Kanban implementation for success



Industry

IT Services

Use Case

Project Management Portfolio
Kanban

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 between the two offices of the company

Key Results

Optimized efficiency
Better Flow Tracking
Real-Time Collaboration
Knowledge Sharing
Managing work fluently

"Kanbanize is a useful tool to monitor team members' work and reflect upon what's happening in projects and their tasks. We stopped making assumptions and started analyzing the reality."

Introduction

Calidae is an Information Technology and Services company based in Barcelona, Spain. It was founded in 1999 by Jordi Medina Fruitós and Jose Martínez Ruiz. Now, 19 years later, Calidae works with some of the most influential companies and has a vast portfolio of happy customers. They are now 30 people and they manage to grow their business without large scale that might challenge them in preserving the established culture. And, as we know, culture is the most important thing for successful companies.

We talked to Jordi Medina to understand their Lean journey and how they discovered Kanbanize and became our partner.

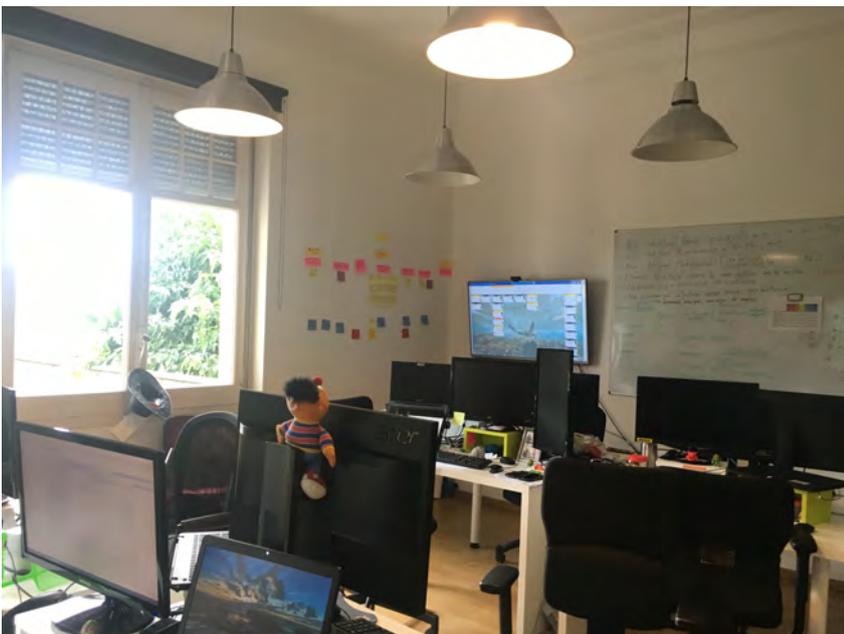
As Jordi says, they were doing Lean from the very beginning before they even knew about Lean and Agile. This resonates with our core belief at Kanbanize that Lean is just common sense and comes naturally when organizations are aimed at being efficient and productive.

Calidae has two offices - the Headquarters in Caldes de Montbui, a thermal water resort near Barcelona and the Barcelona office where the Marketing team is located. We visited the HQ and met the whole amazing team! Here's what we saw and learned there. Follow us as we enter the Calidae house :)

Scaling the Physical Board to Powerful Digital Tool

They started with Agile 5-6 years ago when these approaches were already gaining popularity in the technology world. At first, they had a physical Kanban board in the office but soon they faced the limitations it held to a mature Kanban implementation. Calidae have two offices, remote employees and cross-team collaboration that required something more powerful to help them manage their workflow. They had difficulties keeping the board in order, counting cards, tracing completed tasks and pulling statistical data. Another obvious problem became the need for more boards that were, of course, taking a lot of space. They were seeking ways to optimize the time spent in maintaining the physical board and started searching for the right tool to meet their needs.

The first unsuccessful attempt was trying Jira for a project and then experimenting with some other tools for Agile project management. All of them somewhat lacked the potential to support a mature Kanban implementation, especially powerful flow analytics and automation that would reduce waste. This is how we met each other in January 2018 when Gerard Chiva (one of the leading Agile Consultants in Spain) introduced us to each other. At Calidae, they admit that what made them turn to Kanbanize instead of other Kanban software solutions were exactly the powerful analytics module, the Business rules, and the user-friendly interface. Almost a year later, they do not regret their decision to leave their old tool for Kanbanize.



CALIDAE HOUSE

Software Criteria Fulfilled

- Clear visualization of task dependencies
- Advanced reporting functionality
- Powerful flow analytics
- User-friendly interface
- Flexible workflows; ability to have various swimlane structures within the same board
- Highly customizable card and board views
- Process automation through business rules
- Provides actual project status on all levels

Integrations Implemented

Slack

Email Integration

What benefits did Kanbanize bring?

The team identifies a few main points when it evaluates the impact of introducing Kanbanize. We have summarized the points where improvement in their work process is most visible.

- ◆ Optimizing for Efficiency

We know that visualization is key when we optimize for efficiency. This is why Calidae needed to make sure that they remove waste from their process. And there is no better way to do this than ensuring optimal visualization of the workflow. Visualizing work is the first Kanban principle and it also lies at the core of Kanbanize. The flexibility of the software and the possibility to create custom public filters with aggregated data from different boards provided greater visualization of their work. Calidae also make use of the different board view options and in the photo below, we can see a whole board in a glance from the 'bird eye view'. They use various card linking options and never lose the big picture even when they're working on complex projects.



- ◆ Better Flow Tracking

Understanding the importance of maintaining a healthy flow, Jordi and his team needed a partner in analyzing progress and help them to keep improving their Key Performance Indicators. Therefore, the powerful flow analytics in Kanbanize turned out to be an important differentiator for their choice of tool.

Working on complex projects also requires advanced reporting. When the team needs to compare projects' performance and profitability, they use the Advanced Search Panel and generate all the charts they need by applying custom filter combinations. This way they are able to analyze the workflow based on real data. Comparing projects and cycle times proves to be important for continuously improving their KPIs.

- ◆ Real-Time Collaboration

As a true Lean company, Calidae started with a physical board in the very beginning and had to switch because of the limitations it holds for the dynamic work in IT. Now, years later, they have big screens in every room that project their Kanbanize boards and this way they combine the benefits of a physical and digital board! Everyone can gather around it and discuss and at the same time access it from everywhere.

- ◆ Knowledge sharing

TCalidae has a few different departments working together in Kanbanize and this allows them to easily share knowledge and information about the different cases and tasks without breaking the flow or interrupting each other. Kanbanize helps them stay connected with their Marketing team (based in Barcelona) and quickly transfer information. We were able to virtually meet their work from the Headquarters and understand their process just by seeing the Marketing board and how it is connected to the other boards.

- ◆ Managing work fluently

With so many projects and customers, the teams find it easy to manage work and prioritize in Kanbanize. They have created custom workflows for the different swimlanes in order to map their process in the most convenient way. Calidae use Kanbanize to implement a pull system and effectively meet the demand without creating extra expedite items due to lack of capacity.

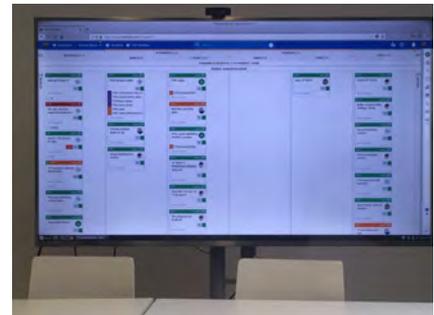
Setting the Kanbanize Boards

It's fascinating how they are collectively mapping their process in Kanbanize and everyone knows why this column is there or why the WIP limit is X. Adrià Fontcuberta, UI engineer at Calidae for 10 years, elaborated on this and shared that they were continuously lowering their WIP limits as they reached the optimal count. As Kanbanize is a very flexible tool, it changes to fit the team's needs instead of the team needing to change in order to fit the tool. We are happy that at Calidae they don't feel restrained by the tool, rather the opposite - they are modifying it to achieve more. The inspiring thing was that every team member knows the tool and how the process should be structured according to the Kanban method. So here is what they did for their teams' workflows.

Marketing

Their Marketing team is named Kiwimbi, meaning 'wave' in Swahili. They're working remotely from Barcelona, so we didn't meet them in person. But we met their board! They have dedicated swimlanes for the big customers and a General Marketing swimlane. The "In Progress" area is divided into two main columns - In Progress and Validation. The big campaigns have child cards linked to them - e.g. the design work, the copywriting, email outreach, etc.

"We stopped making assumptions and started analyzing the reality. Kanbanize is a useful tool to monitor team members' work and reflect upon what's happening during a project's life and its tasks, from the first contact with customer until the end of the execution."

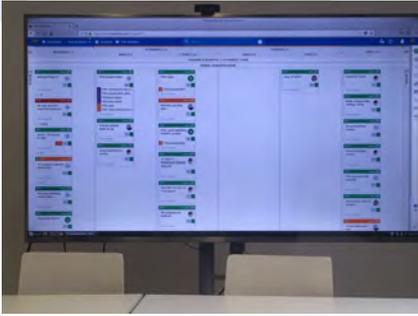


Àngel Fernández, Lead Developer:

"Kanbanize is a great tool to manage your Kanban process.

It is so easy to use, but it comes with lots of features, and they're continuously improving and adding new useful tools.

Also, the people behind Kanbanize are awesome and they have proven to be an amazing support team. :)"



Backend Dev

The backend development team is called Turtles! And of course, they have a great sea turtle on the background of their Kanbanize board.

Their workflow is structured like this:

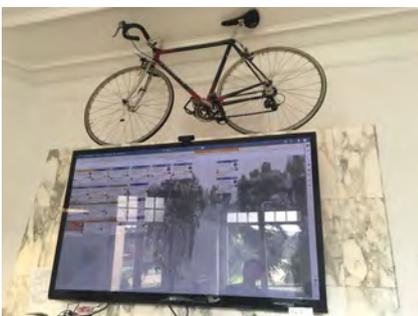
Requested		In Progress						Done	
Backlog	Commitment	Dev		Code review		Test		Ready to deploy	Done
		Doing	Done	Doing	Done	Testing	Done		
Expedite									
Fixed Date									
Standard									
Intangible									

In order to ensure they have a well-working pull system, there is a queue column, named Done on Fig.1, after each of the activity columns, called Doing, in the In Progress section. Their swimlanes are the classes of service and just as by the book they barely have expedites.

Frontend Dev

Frontend development - the Phoenix team! Strangely, they don't have a mighty phoenix in the background but the cyclist race perfectly fits the real bike over the screen!

The board structure is more or less the same as the Dev's team board, excluding the Fixed Date swimlane.

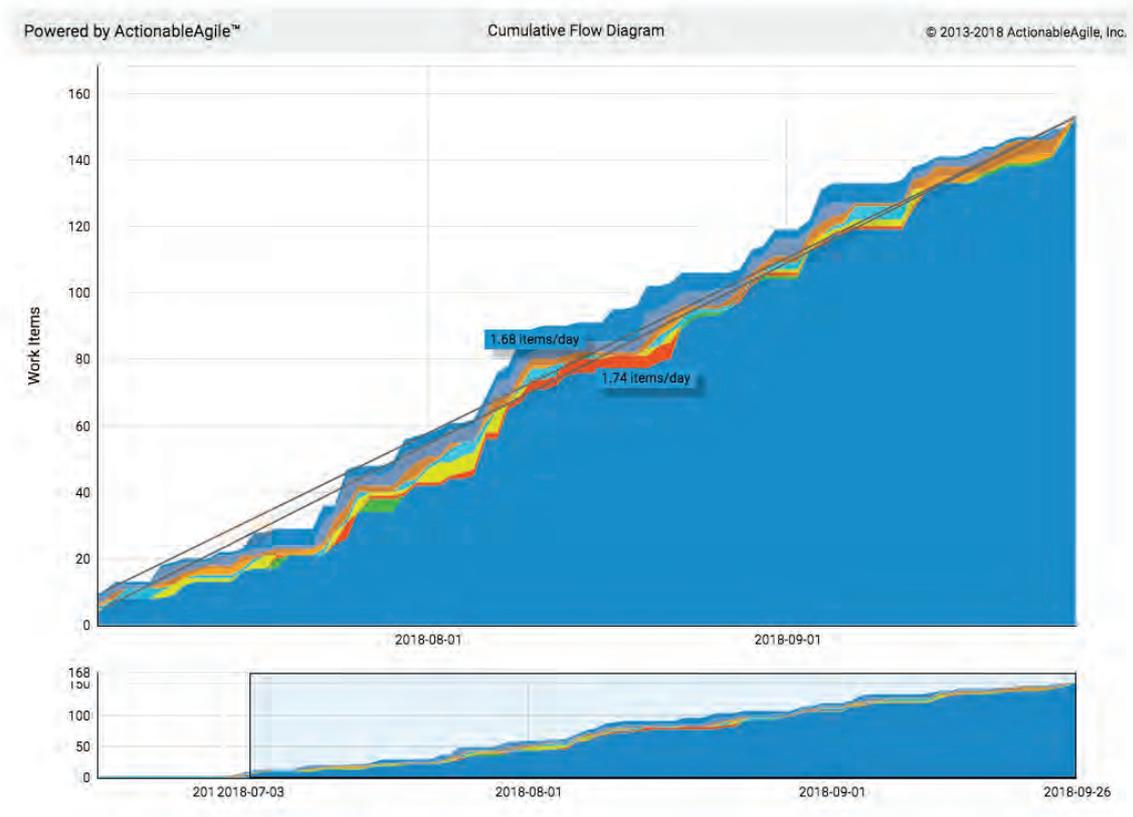


We also have some data from the Phoenix team, proving that they have managed to establish a true Kaizen culture of continuous improvement. Let's take a look at their Cumulative Flow Diagram in Fig.2! This chart is one of the most important if you want to keep a healthy flow and be able to get the big picture in a glance. We'll just summarize what we should see in a CFD, so you could interpret the data yourself. Each colored lane is a different stage on the board. The bottom one is always the Done area and it keeps growing as more and more items get completed.

The direction of the line should always point upwards and any flat areas indicate slowdowns in the process.

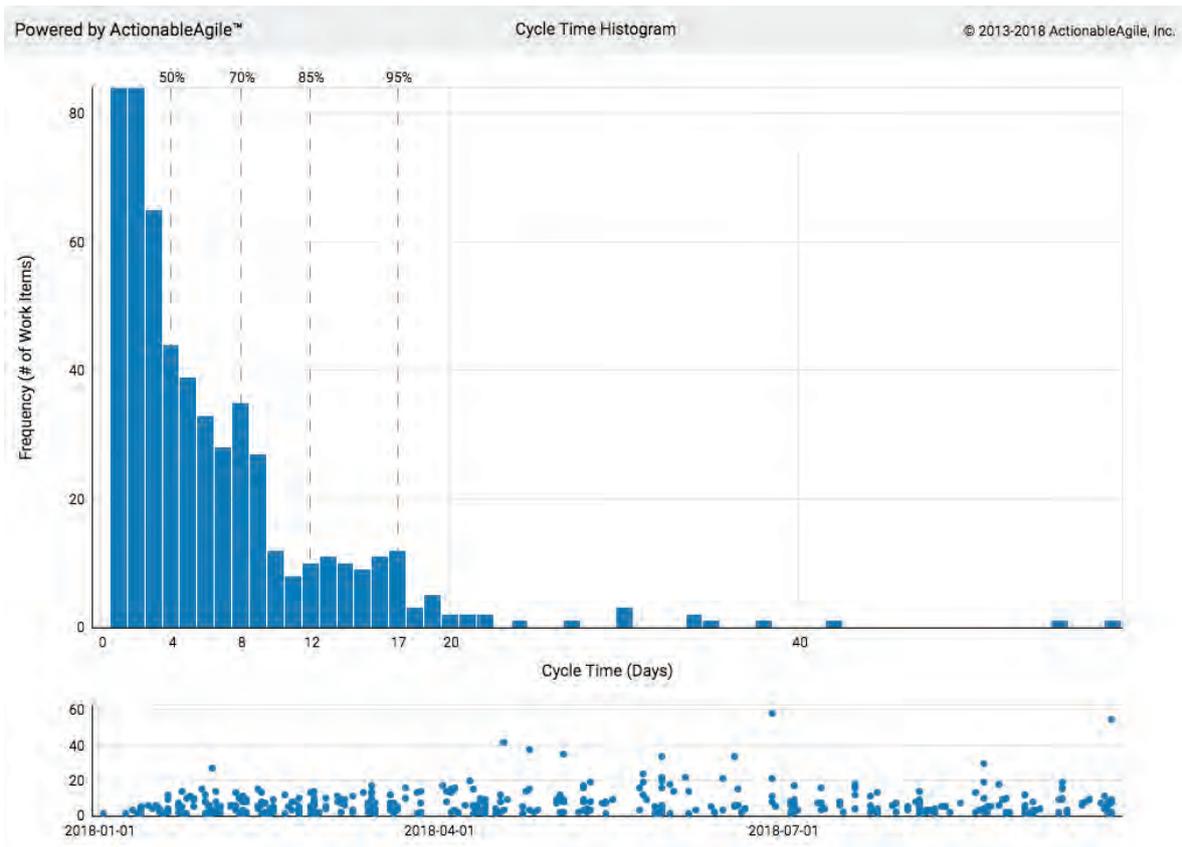
The only delays in this chart are noticed in the middle of August, which is normal for the vacation season. Otherwise, we see a great trend in reducing the cycle time and increasing the throughput of the team.

Even though they've been Lean and had no obvious problems with efficiency, not having the right metrics, was keeping them from unlocking their full potential. Now, as they monitor the CFD, teams even faster! When they started with Kanbanize they were starting more work than they were able to complete and just a few months later, we see a whole different picture. They are completing more items (1.74) a day than they pull into In Progress (1.68) and we can clearly see that the distance between the top and bottom areas is steadily decreasing, indicating that they have become faster and more efficient!



Adrià (member of the Phoenix team) shares his thoughts on the analytics and notes: *“We’ve seen a positive trend during the last quarter (July-August-September-today) regarding our CFD. We tend to complete more items than add them to the backlog, so we tend to deliver more than asked.”*

The other chart that we can take a look at is the Cycle Time Histogram (Fig.3), proving how fast they are. We can clearly see how they complete 50% of their tasks in 4 days or less and 75% within 10 days! Moreover, when we look at the overall bar below, we notice that this is a stable trend and even more and more tasks are clustered in the lower part of the first 10 days (except for the few outliers). When we interpret this data, we also need to have in mind that it doesn't exclude weekends and holidays from the Cycle Time aggregation. We do this on purpose because Lean companies put an extreme focus on creating value and are customer-centric. In this sense, a customer doesn't care about the days that we don't work, rather when their request will be delivered.

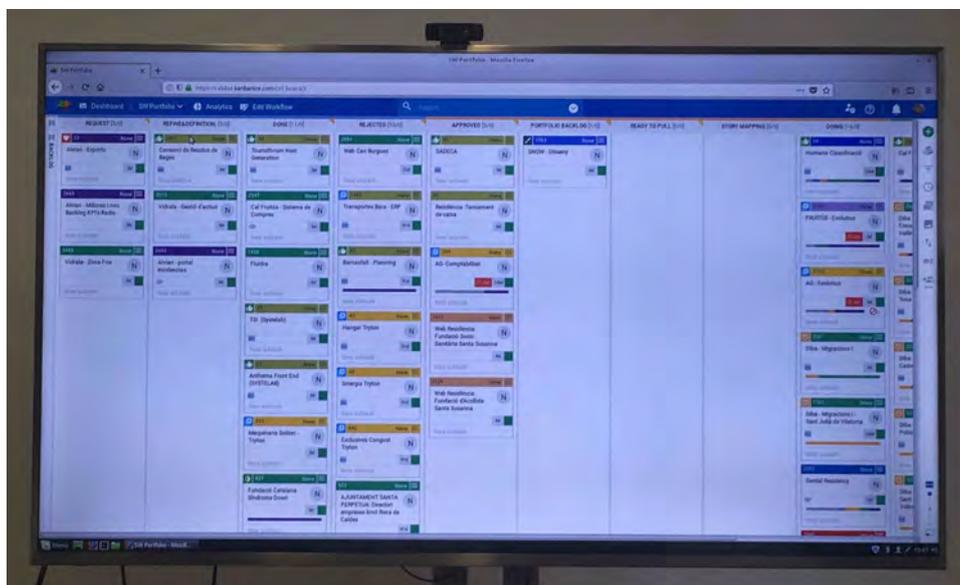


Finance

Recently, they have started introducing Kanban in their Finance and Accounting processes as well. They have started generating reports in Kanbanize and they use the Advanced Search reporting to compare how projects are progressing in terms of time and budget. Now they are focused on making the process Lean through enhancing collaboration and implementing feedback loops and retrospectives.

Portfolio Kanban on a Company Level

Just as being Lean is common sense for Calidae, when Kanban is done properly, it scales naturally. Apart from the team boards, they have a Portfolio board, where they visualize all big projects.



All the tasks related to them are represented by child cards and the status is visible through the colored progress bar on each project. The portfolio board has a bit different structure from the team boards as there is an activity column in the 'Requested' area where projects are refined and get either rejected or they continue to 'Approved' in 'In Progress'. The idea is the same but the projects pass through the following phases:

Requested				In Progress					Done
Request	Refine & Definition	Done	Rejected	Approved	Portfolio Backlog	Ready to Pull	Story Mapping	Doing	

The Portfolio board serves as a Project Management one where all the coordination and management happen on a company level. As it is shown on the board, they use a color code for clear visualization of the different customers. Card types are also widely used on all boards to define tasks and gather information in a glance.

Integrations

Calidae have integrated Kanbanize with Slack via Zapier. The team was already using Slack for online project related discussions and integrating it with Kanbanize came in handy. They use this scenario with the combination of mentions and card comments to quickly notify all users and distribute tasks. For example, important tasks automatically appear in designated Slack channels. When reacting with the team's icon to the task, it is automatically sent to the team's board in the Expedite swimlane.

Final Thoughts

With the collective knowledge in Calidae about Lean, Kanban and Kanbanize being very advanced, the team is able to decide collectively how to structure their process and obtain all the benefits. Along with the projects they work on, they also managed to carry out the whole organization of Agile Open Spain 2018, which took place in Caldes de Montbui. The feedback was all positive, showing that a healthy workflow allows us to manage all initiatives effectively.

About Calidae

Calidae is a Spanish Information Technology and Services company. The team is dedicated to new information and communication technologies, committed to empowering companies in their process of digitization, communication, and structuring of their business processes. Our objective is to improve communication, productivity, and costs of our clients, by means of the introduction of Information and Communication Technologies (ICT).



About Kanbanize

Kanbanize is a visual Lean Management platform that boosts teams' efficiency and productivity by applying the Lean principles of the Kanban method to the way people work. The software helps companies design their workflow, create a manageable project breakdown structure for all teams, collaborate with others and track important metrics out of the box. Kanbanize eliminates the problems that are often faced in projects with many stakeholders or between distributed teams while promoting a healthy workflow with less waste and a leaner process of getting things done.

Contact us at sales@kanbanize.com or visit www.kanbanize.com to learn more!



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