Scrum and Kanban in Workfront

Hope you enjoyed Leap 2018! We know we covered a lot of ground in a short amount of time. A review of the key takeaways and processes you learned from the Workfront Training team can be found in this reference packet. We hope you picked up some new skills and information to help you tackle and tame your work chaos.

We would love to stay in contact! Email us at **training@workfront.com** with any questions or feedback.

Hope to see you at Leap 2019!

Sincerely,
The Training Team

Agile: Scrum

Workfront functionality supports the **Scrum and Kanban** variants of Agile. Workfront Help website articles describe needed system setups and use of the Agile storyboards.

Scrum

Key players

There are three key players on a Scrum team:

- **Product owner —** Product owners have the vision for what the product will be. They are a voice for the customer and the primary driver of decisions.
- **Scrum master —** Scrum masters help the team get work done by finding needed resources and creating consensus among the team.
- **Team members —** A team is usually has members with different job roles and skill sets. They are in charge of planning, executing, and delivering product increments.

Prioritizing work

The individual work items needed to complete the deliverable are referred to as stories, and one of the key steps to handing stories is to build a backlog.

The Scrum team identifies the priority work items and compiles a list to create the backlog. The backlog is then "groomed," during which they complete four key steps:

1. Break bigger stories into smaller increments, so work can be handled efficiently and by the proper team members.
2. Prioritize the stories and decide which go first.
3. Clarify criteria that indicate a story is complete.
4. Estimate the amount of time they need to spend on each story, and the backlog as a whole.

Iteration planning

After the backlog is prioritized, the team decides which ready-to-go stories to complete during the iteration. The iteration, sometimes called a sprint, is a set period of time during which the work will be done.

The team makes assignments on the stories and gets to work.

Executing the iteration

To communicate and collaborate on the in-progress work, team members hold a daily stand-up meeting where each member answers three questions:

1. What did I get done yesterday?
2. What will I get done Today?
3. What are the roadblocks that are preventing progression of my assignments?

Work progress is tracked in Workfront using a story board, which each story represented by a "card" that is moved into a column representing the status of the work — new, in progress, or complete. The burn down chart is used to monitor work progress, tracking if stories are completed at a fast enough rate to get the work done before the iteration ends.

Retrospective

Once the iteration is complete, it's time to look back at how things went. What did the team learn? What went right? What went wrong? Do we have the right members on the team? Do any processes need to be updated? Do deliverable expectations need to be changed.

And then the process starts over again, with the backlog being groomed and another iteration starting.

Agile: Kanban

Workfront functionality supports the **Scrum and Kanban** variants of Agile. Workfront Help website articles describe needed system setups and use of the Agile storyboards.

Kanban

Kanban methodology focuses on an optimized workflow. Kanban looks to improve the flow of work by setting a limit on the amount of work that can be in progress at one time.

Key players

The key players are similar to Scrum, except there is no Scrum master. It may still make sense for someone to act as a project manager, but this role often occurs naturally as the need arises.

- **Product owner —** Product owners have the vision for what the product will be. They are a voice for the customer and the primary driver of decisions.

- **Team members —** A team is usually has members with different job roles and skill sets. They are in charge of planning, executing, and delivering product increments.

Kanban storyboard

Teams operate off a Kanban board, where each column represents that status of work being done. A simple board may have three columns — to do, in progress, and complete. Team members move their stories from column to column to indicate what state the work is in. The board provides a visual way for the team to track its work.

Prioritization

Team members work with a product or project manager to make sure the stories in the backlog and on the Kanban board are prioritized and that work moves forward toward completion.

The product manager is responsible for working to ensure the customer's voice is heard and the product moves in the right direction.

Limit work in progress

Kanban teams have a limit on the capacity of the number of stories they can handle at a give time. Teams select the amount of stories they're will to have in their to do and in progress columns, and they don't go over that number to prevent burnout. Once a story is complete, a story from the backlog is moved to the to do column.

Continuous improvement

Kanban allows teams to see how their workflows operate, how long every piece of the workflow takes, and how often they are getting deliverables out the door on time. This makes it easier to experiment with different ways of doing things to optimize output.

Is Agile Right for You?

Before you jump into Agile, you need to determine if it's right for your team or organization. Start with this question:

Can the projects you manage and the deliverables you produce be created using an Agile workflow?

Not every process or deliverable fits well into an Agile workflow. It's important to look closely at the work being done to determine if it's a good fit.

For example, the creation of video training modules at Workfront fits well into the Scrum model because of the short turn-around time, the need for team collaboration, and the fact that deliverables change during the iteration based on need. However, development of training content (such as this quick guide) for Leap works better in a waterfall project because of the several-month duration of the project, the fixed deliverables, and rigid deadlines.

Other questions to start with include:

- Do you need to be able to change the focus or direction of the deliverable in the middle of the process?

- Will you be starting the project without knowing all the details of what the final deliverable will look like?

If you're answering yes to these questions, a transition to Agile might be in your future. Here are additional questions to ask, focusing on the infrastructure of your team. These questions aren't all encompassing, and answering yes to all of them doesn't mean Agile is the perfect fit, but this should get the conversation going before deciding to make the switch.

- Are they located near each other?

- Can they have daily stand-ups in person?

- If the team is not geographically close, do you have technology in place that allows them to quickly collaborate?

- Can you get everyone on a similar daily stand-up schedule?

- Will they be able to work in iterations?

- Are they commonly getting assigned work as a team or is everyone getting assigned work from random places?

- Are the members of your group open to change?

- Are they willing and able to collaborate and constructively discuss issues as they come up?

- Do you have individuals who can take on the role of product manager or Scrum master?

Agile Terminology

Workfront can be used to manage work by teams that use Agile processes. Agile uses a different terminology than what is used with a "regular," or waterfall, Workfront workflow.

AGILE FEATURES		
	WHAT IS THIS?	**WHERE IS IT?**
BACKLOG	An area housing a list of Stories	A tab on the Team page
BURNDOWN CHART	Ideal vs. actual timeline chart	Iterations tab and Iteration landing page
CAPACITY	Ideal time a team can spend	Entered as you plan an Iteration
ESTIMATES (points)	Value (points) given to a Story	Entered as you create a Story
FOCUS	Actual time team can spend	Entered as you plan an Iteration
HOURS	Work measured in points or hours	Team Settings
ISSUE	Unplanned item assigned to the Agile team	A tab on the Team page
ITERATION (Sprint)	Period of time to finish Stories	A tab on the Team page or an Iteration landing page
STORY POINTS	Measures difficulty of a Story	Entered as you create a Story
PRODUCT OWNER	Voice of the customer, in charge of grooming the backlog, ROI	Iteration Details
SCRUM MASTER	Protects interests of the team and removes roadblocks	Added as a team member as the Agile team is created
STORY	Task that needs to be done	Backlog tab on the Team page or Iterations tab if a Story is moved
STORY BOARD	Stories and Tasks by Status	Iterations tab or its landing page
TEAM	Small group working together and in charge of estimations	People area in the navigation bar

Getting Started with Agile

A quick review of the steps involved when using the Scrum work methodology.

| SCRUM QUICK STEPS		
1. CREATE AN AGILE TEAM	Do you want your Agile team working in points or hours (Team Settings)? Determine columns for the story board. (Each column is a task status)	
2. CREATE PARENT PROJECT	Just as Tasks in Workfront belong to a Project, Stories will also need a Project (parent) to belong to.	
3. CREATE STORIES	**FROM THE BACKLOG**	Selecting the New Story button generates a light box in which users define the story name, parent project, and estimates.
	TASK ASSIGNMENTS	An Agile team assigned to a task on any project will generate that task as a Story in the backlog.
	ISSUE ASSIGNMENTS	Issues assigned to the team appear on the team's Issues tab. Issues can be converted to stories by clicking the Convert to Story button.
	WORK REQUESTS	Tasks can be created and assigned to the team from the Teams tab, using the request link in the Team Actions menu.
	AD-HOC TASKS	Users can create and assign an Ad-Hoc task to a team in the My Work area. On the Working On tab, click the Ad-Hoc task icon.
	ITERATION LANDING PAGE	Click the Iteration name to open the landing page. Click the New Story button to add a story to the Iteration.
4. GROOM BACKLOG	Breakdown Stories, if necessary Prioritize Stories Estimate how long each Story will take Mark the Stories as 'Ready'	
5. PLAN ITERATION	Set the Iteration dates, the capacity, and the focus	
6. EXECUTE ITERATION	Make Story assignments to team members Color code the Stories Breakdown Stories, if necessary Team members change status of Stories using the story board Edit iteration details on the Iteration landing page Add more Stories to the Iteration Move Stories out of the Iteration	

Workfront Help & Training

Find answers to software questions on the Workfront Help website. Complete self-paced training in Workfront Ascent and the Workfront Training Center.
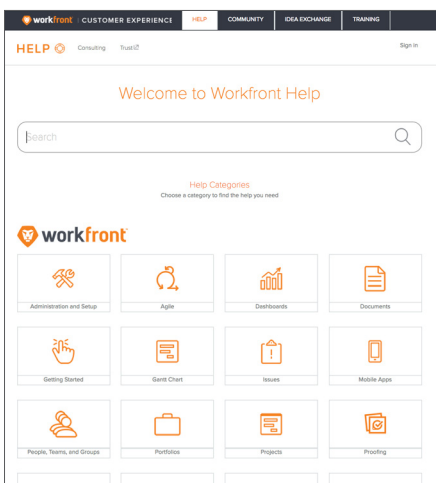

Workfront Help website
support.workfront.com

- Search for articles about Workfront software features

- View collections of articles about specific topics with the Help Categories

- Keep up with new product features in the Product Announcements area (bottom of the window)
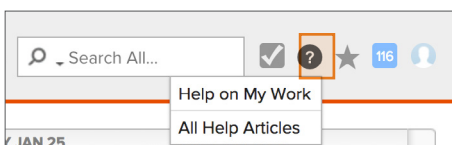
- Click the Help icon in the global navigation bar inside Workfront to view Help articles specific to the Workfront area you're on or to access the overall Help website.
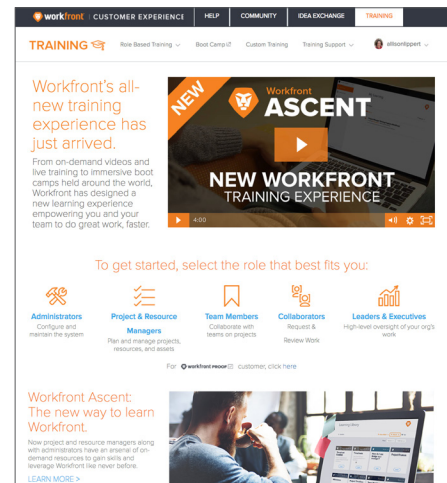
Workfront Training Center
training.workfront.com

- Project managers can find additional training in Workfront Ascent. Click the Project & Resource Managers icon to sign in.

- Team members and collaborators (request and review users) can find training through the Workfront Training Center. Click the appropriate icon to access short videos.

- Click the Training Support link at the top of the window to access a variety of articles about Workfront's training program, including a list of all courses offered.

Workfront Training PDU Credits

Many of the Workfront Training courses offered at Leap count toward PDUs (Professional Development Units) at PMI (Project Management Institute). Project Manager Fundamentals is a prerequisite for all PDU-eligible courses.

WORKFRONT COURSE NAME	PDUs	ACTIVITY CODE
Boredom vs. Burnout: Managing Your Team's Workload	1	W-009
Driving User Adoption	1	W-013
Essential Skills for Getting Stuff Done	1	W-012
Get Strategic with People Management	1	W-008
Helpful Reports to Get You from Demand to Delivery	1	W-019
Introduction to Agile Work Management	1	W-014
Manage Reviews & Approvals in Workfront	1	W-017
Moving from Legacy to New Resource Management Solutions	1	W-011
Project Time Management	1	W-016
Queue Management	1	W-018
Review & Approval Administration, Part 1	1	000-039
Review & Approval Administration, Part 2	1	000-040
Scrum and Kanban in Workfront	1	W-015
Setting Up Workfront for Better People Management	1	W-010

Claim your PDUs

Occasionally Workfront will retire course codes at PMI. Activity codes for Leap courses will expire at the end of 2018, so be sure to claim them before then. To verify an activity code is still active or claim a credit, go to:

http://www.pmi.org/ > Certifications > Maintain Certification > Visit CCRs > Search Activities > Search for Workfront

Workfront Training

Ensuring users receive thorough and appropriate training on how to use Workfront is a vital part of a successful implementation and continued adoption. The Workfront Training team offers a variety of training options to fit your organization's needs throughout your Workfront experience.

THE WORKFRONT TRAINING CENTER

Team members and collaborators can access sessions in the Workfront Training Center to prepare for launch. Anyone who will be using Workfront needs to attend training.	• Included with your Workfront purchase • No registration or login required for Workfront Training Center • Training available for Work license users (team members, executives/ leaders), Collaborator license users, and Workfront Proof users • Online learning and live courses available • Print-ready resources for review and additional learning

Get started at **training.workfront.com**

WORKFRONT ASCENT

Your core team can prepare for your Workfront implementation by taking training through Workfront Ascent.	• Included with your Workfront purchase • Online, self-paced learning focuses on the needs of project managers, resource managers, system administrators, and others with Plan licenses • Option to take live courses to supplement online learning • Print-ready resources for review and additional learning

Get started at **training.workfront.com/ascent**

SYSTEM ADMINISTRATOR BOOT CAMP

New and beginner-level Workfront system administrators are invited to spend time at Workfront headquarters in Lehi, Utah. Or join us at varying locations across the country.

- Administrator-specific standard training courses
- Courses designed specifically for the system administrators attending Boot Camp, based on pre-session surveys and phone calls
- Not intended for experienced, long-time Workfront system administrators or back-end developers

For dates of upcoming sessions or to register, visit the **Boot Camp** webpage

CUSTOM TRAINING

Custom Training is a collaborative process between your organization's core team and the Workfront Training team. Our goal is to empower users with the knowledge, skills, and resources they need to get the most value from Workfront.

This collaboration leads to successful training and development of custom documentation — and ultimately a successful Workfront launch.

Dedicated Standard Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- No content customization
- Course taught with Workfront test drives

Dedicated Custom Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- Course topic selection; customer workflows can be incorporated
- Course taught using customer's live or sandbox environment

Custom Documentation

- Documentation captures your processes and workflows within Workfront's feature functionality
- Custom documentation can be added to custom training purchase or purchased separately

Train the Trainer

- Training consultation and/or working session with Workfront trainer
- Customized course training outline for team members or project managers
- Customer delivers training to end-users

Contact your Workfront sales representative for details.