STATE OF KANBAN

2021

FIRST ANNUAL REPORT #YESWEKANBAN

PRESENTED BY

kanbanize

Kanban University

Swift Kanban from digité

STATE OF KANBAN REPORT

Key Messages

This year's inaugural survey was a joint effort by Kanban University, Kanbanize, and SwiftKanban. The survey was sent to numerous mailing lists and promoted on social media and through partner channels. Overall, we received 1,069 responses. From the survey we have summarized 5 key messages:

1. Kanban is global and across many industries.
2. Kanban scales, both to multiple teams and to multiple functional areas.
3. Kanban works, with 76% reporting Kanban to be more or much more effective than other methods.
4. Tooling matters. Tools designed for Kanban are highly recommended, while general agile tools claiming to have Kanban support fall short.
5. Training works. Those respondents that took training reported significantly higher utilization of key Kanban practices.

SUMMARY

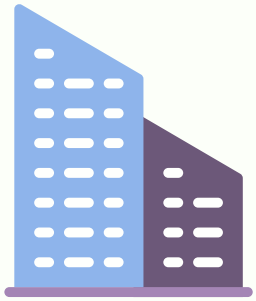
Survey Demographics (p. 5-6)

Kanban Is Global. And Not Just in IT

Kanban is not just a North America or Europe thing; it is growing throughout the world. We had responses from 64 countries with the largest number of responses from Brazil.

Kanban is also not just for Information Technology (IT). Certainly, Software Development and IT represented the largest number of responses, but many other functional areas were represented as well.

SUMMARY



Kanban Scale and Maturity (p. 7-11)

Organizations of All Sizes Are Using Kanban.
Kanban is used in organizations small and large. The largest group of respondents were from organizations larger than 10,000 employees. 41% of organizations were applying Kanban across 10+ teams or to the whole company. This is a clear indication that Kanban is being used at scale.

Usage of Kanban Practices is Maturing.
Respondents are using many Kanban practices and continuing to mature. 42% indicated 1-3 years of Kanban experience, while another 42% had more than 4 years experience.

Why Kanban? (p. 12-14)

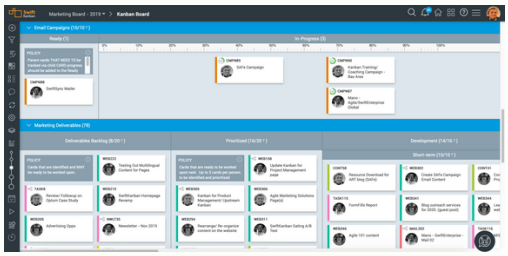
Evolutionary Change - Kanban the Great Unifier
Kanban is an approach to evolutionary change which “starts with what you do now.” The starting point for the largest number of respondents was either Scrum (44%) or Waterfall (25%). Kanban can start anywhere in an organization including areas where Scrum, Waterfall, or no clear way of working is defined and use evolutionary change principles to improve service delivery.

Reasons for Adopting Kanban
The top reasons for adopting Kanban were improved visibility, continuous improvement, and increased throughput. Not surprisingly, reported results from Kanban initiatives were similar, but also many saw improved alignment with business objectives.

Value Proposition: Life Is Better With Kanban
76% of respondents reported that Kanban was "More Effective" or "Much More Effective" than other methods/frameworks that they have used. Only 1% said it was less effective.

SUMMARY

Kanban Tools (p. 15-16)



Tooling: Using the Right Tool Makes Kanban Easier

While Jira was the most common tool being used by respondents, it was not highly recommended by those using it.

SwiftKanban, Kanbanize, Kaiten, and Nave all earned high marks for their support of Kanban implementations and correspondingly had a high likelihood for users to recommend the tool.

Kanban Training (p. 17-18)

Training Increases the Adoption and Use of Kanban Practices

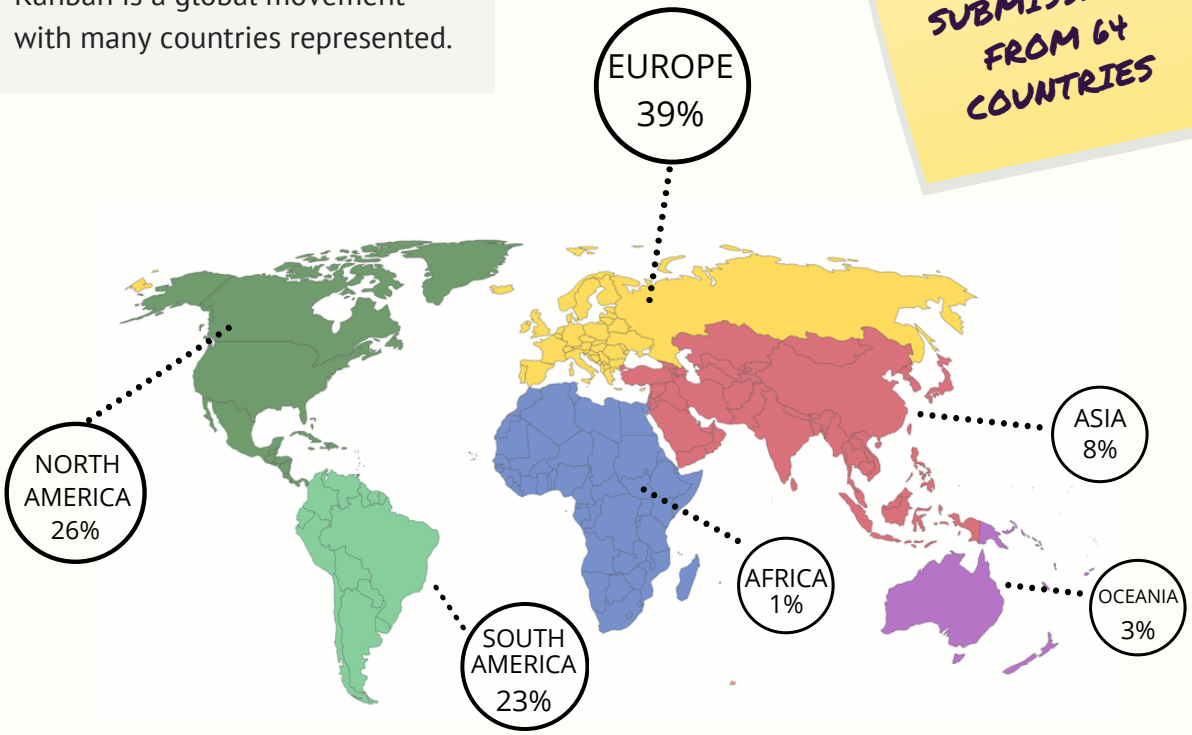
A little over half of the respondents had taken a least one class from Kanban University. We checked to see if there was a correlation between taking a Kanban class and the usage of the core Kanban practices. For all of the practices there was a significantly higher usage score from the respondents that had taken training from Kanban University.

COUNTRY OF ORIGIN AND SIZE OF ORGANIZATION

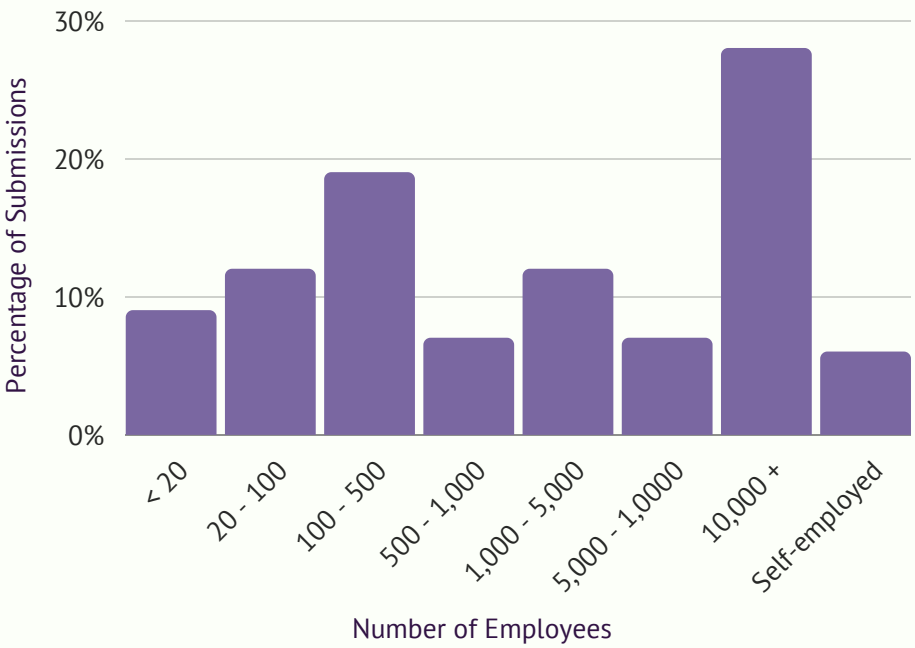
Top 10 Countries of Origin

Kanban is a global movement with many countries represented.

THIS YEAR'S SURVEY RECEIVED SUBMISSIONS FROM 64 COUNTRIES



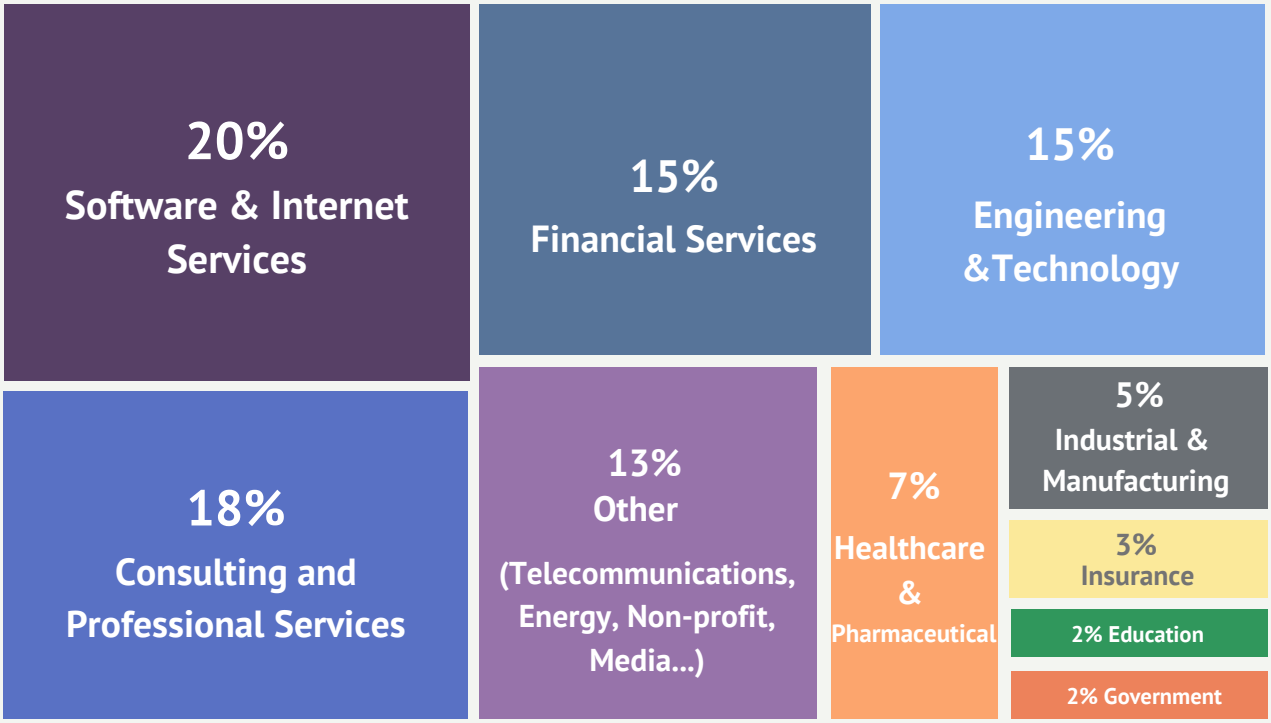
Size of Organization



Kanban is being used by small, medium, and large businesses. This year's survey found that a majority of submissions came from medium and large businesses, with large businesses representing more than 25% of the submissions. Kanban works at scale.

INDUSTRY AND FUNCTIONAL AREA

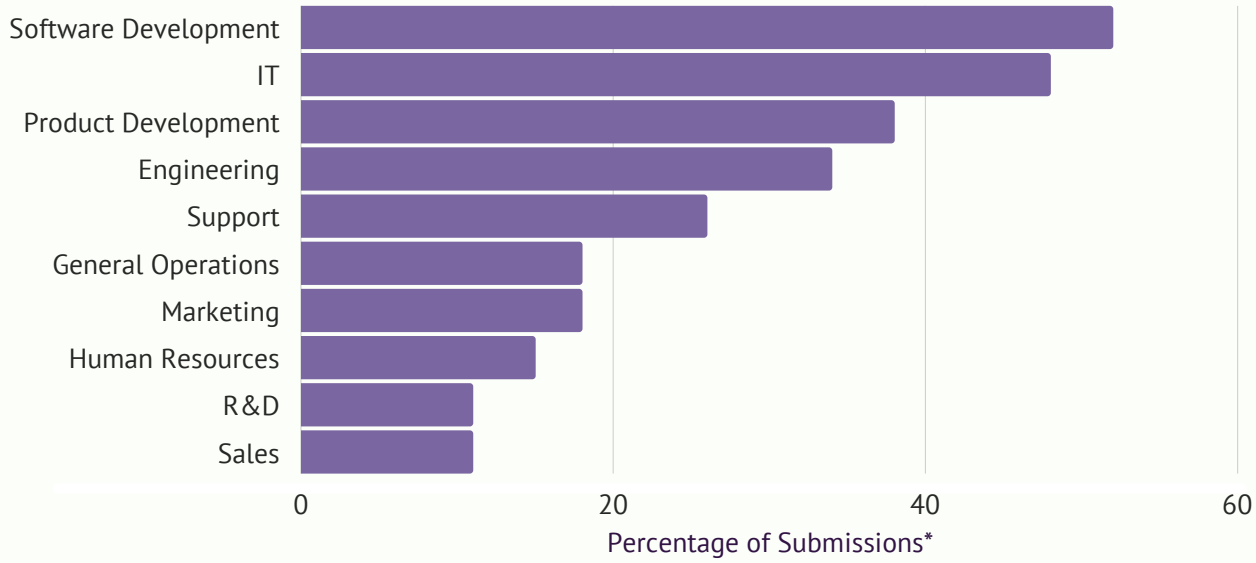
Top 10 Industries



Kanban is well represented in many industries and not just within software and internet services. This year we saw representation from industries that included healthcare and pharmaceutical, industrial or manufacturing, insurance, government, education, and more.

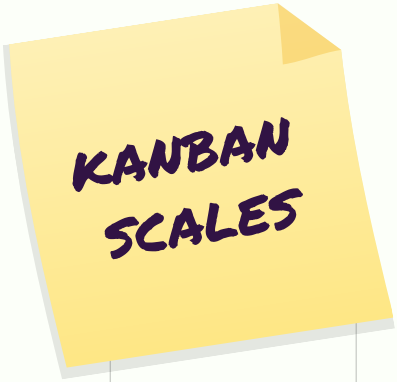
Likewise, Kanban has grown well beyond the IT functional area to support other knowledge work functions that include general operations, marketing, human resources, research and development, sales, finance and accounting, recruitment, and procurement.

Top 10 Functional Areas in the Company Using Kanban

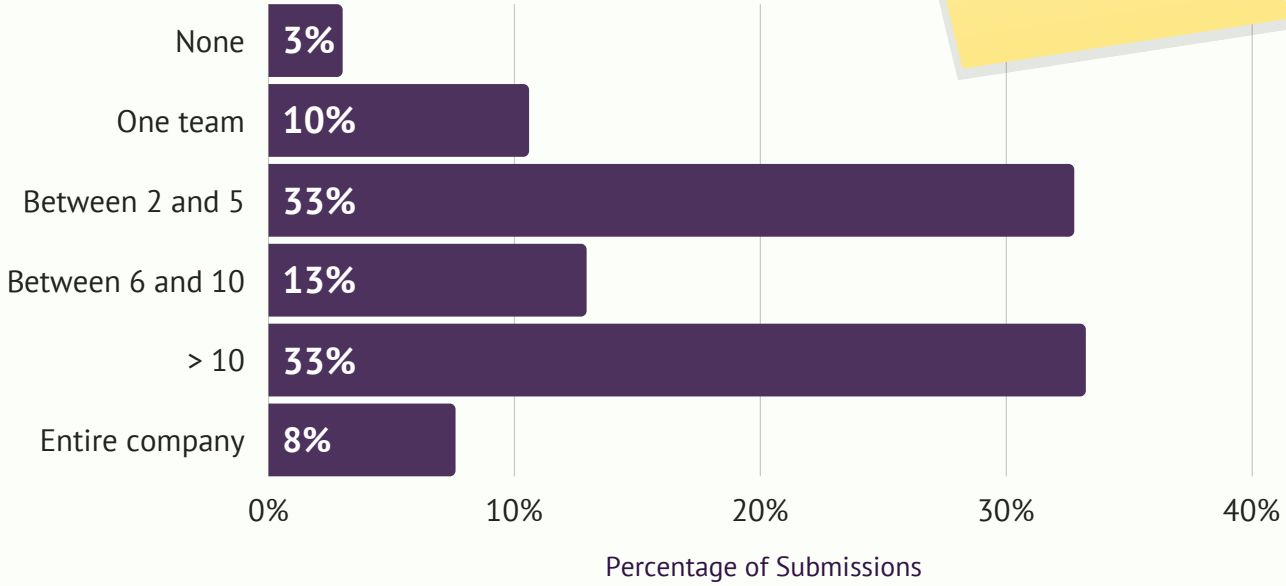


*Respondents could choose more than one option.

MATURITY, SCALE AND ORGANIZATIONAL USAGE OF KANBAN

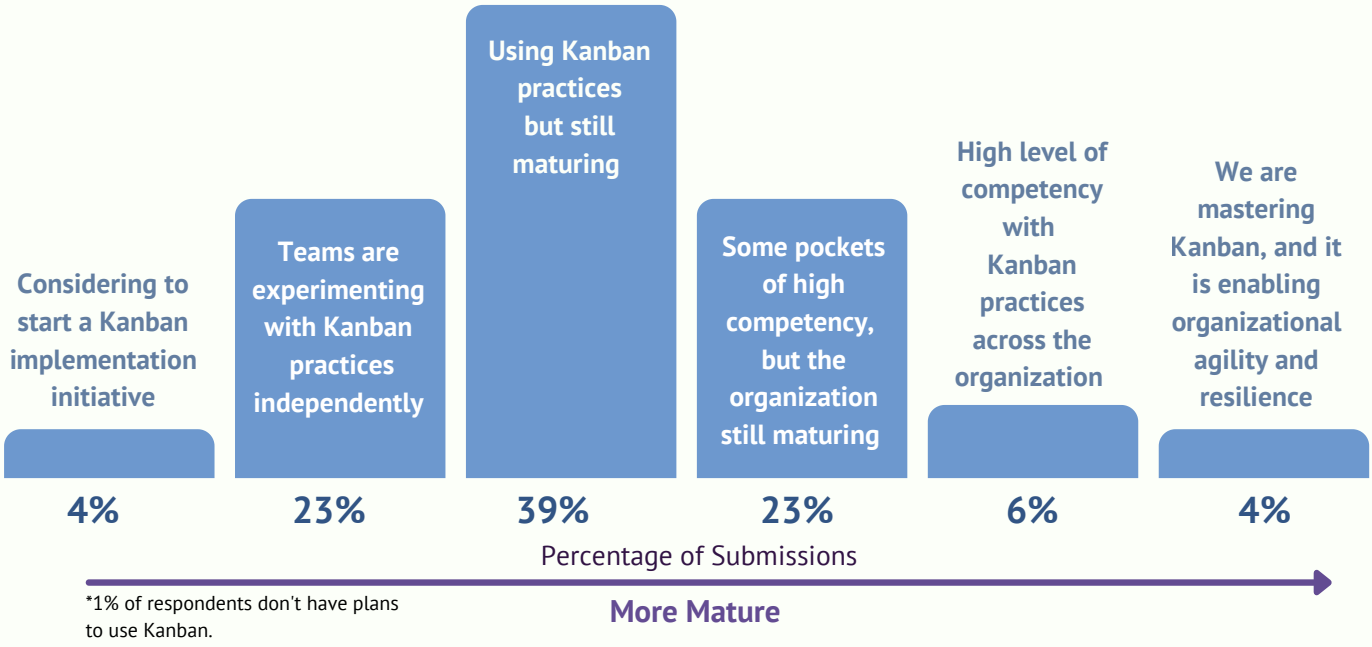


How Many Teams In Your Organization Practice Kanban?



Practicing the Kanban Method within an organization commonly starts at the team level and evolves outward or upward. A majority of our respondents indicated that multiple teams were using Kanban. It is not uncommon to see an organization pilot the usage of Kanban practices within a small subset of their overall teams prior to a larger adoption initiative throughout the rest of the organization at scale.

What Is the Level of Competency with Kanban Practices in Your Organization?

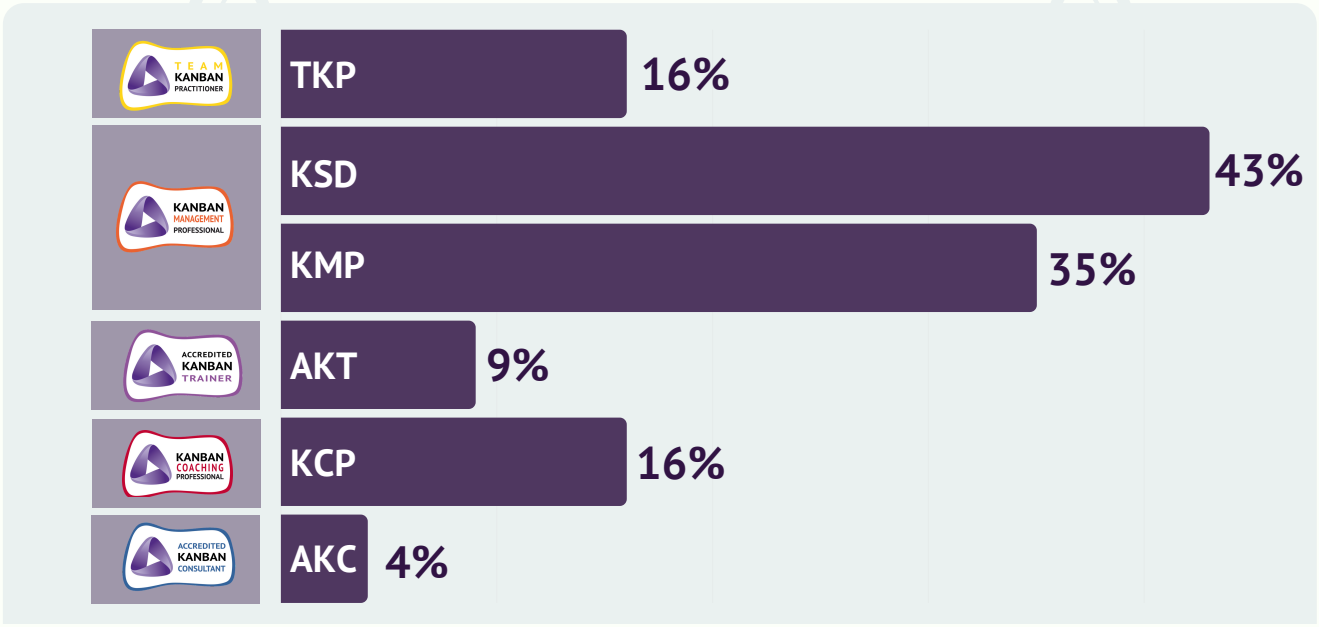


*1% of respondents don't have plans to use Kanban.

KANBAN TRAINING AND EXPERIENCE

Which Courses from Kanban University Have You taken?*

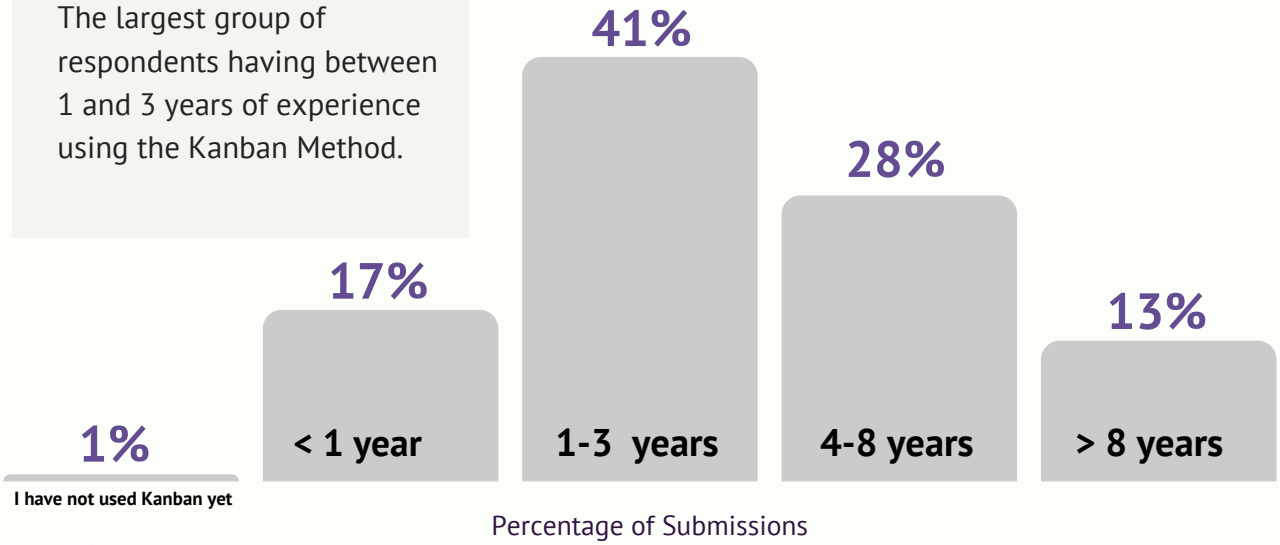
A majority of submissions came from individuals who have taken training from Kanban University on how to use the Kanban Method. A total of 569 people had taken a class from Kanban University compared to 500 that had not. 463 had taken the Kanban System Design course and of those 372 had completed Kanban Systems Improvement course in order to recieve the Kanban Management Professional credential.



*Respondents could choose more than one option.

Years of Experience Using Kanban Practices

There was a good distribution of experience. The largest group of respondents having between 1 and 3 years of experience using the Kanban Method.

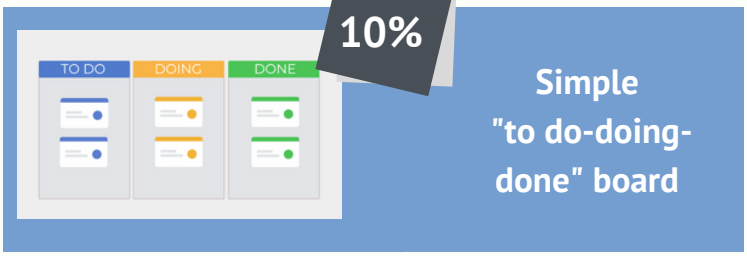


MATURITY, SCALE AND ORGANIZATIONAL USAGE OF KANBAN

Which of the Following Boards Are the Most Similar to the Types of Boards at Your Organization?

More Mature

Percentage of Submissions



10%

Simple "to do-doing-done" board

37%

Intermediate Kanban board

17%

Multiple connected Kanban boards

24%

2-tiered kanban board

10%

A network of services

*2% responded "I am not sure".

A majority of respondents indicated that they were using either a 2-tiered Kanban board or Intermediate Kanban board with swimlanes and sub-columns. 2-tiered Kanban boards are commonly found in scenarios that involve a project management organization that utilizes a portfolio Kanban board in combination with upstream or delivery Kanban boards. Intermediate Kanban boards are used by organizations that likely separate their delivery using types of work or classes of service.

MATURITY, SCALE AND ORGANIZATIONAL USAGE OF KANBAN

KANBAN IS MORE THAN STICKIES ON THE WALL... CLICK AND DISCOVER MORE

Application of Kanban Practices

Many of the Kanban practices are used regularly. The vast majority reported using a digital tool. This is not too surprising given that the survey was given during COVID times. In general, there is good emphasis on flow and reducing work in progress. Respondents indicate high utilization of the following practices.

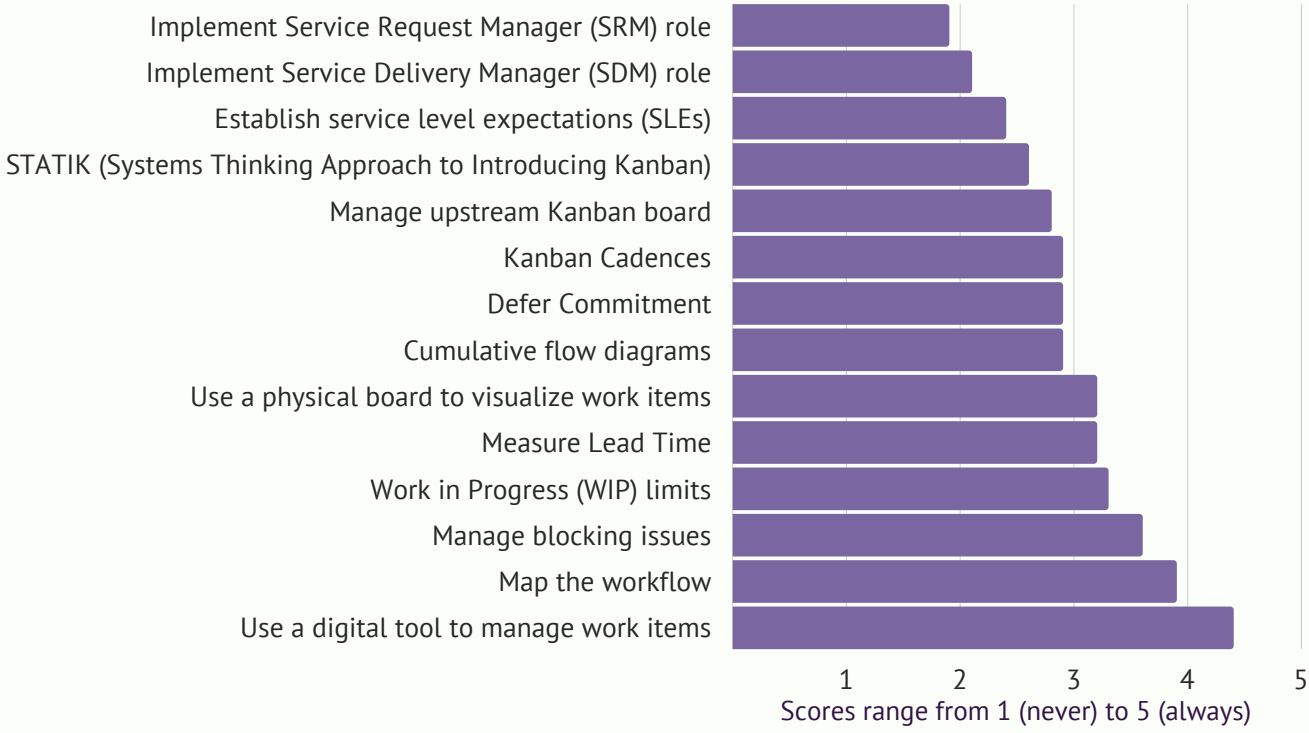
Map the workflow

Manage blocking issues

Work in Progress (WIP) limit

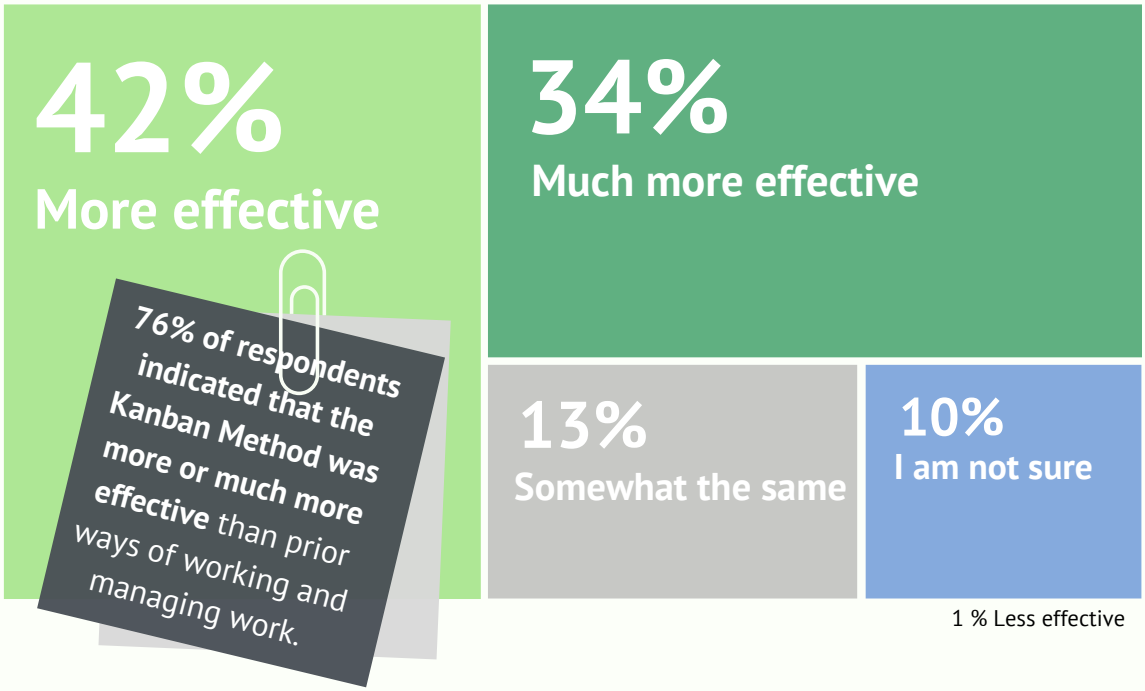
Measure Lead Time

Average Score by Practice



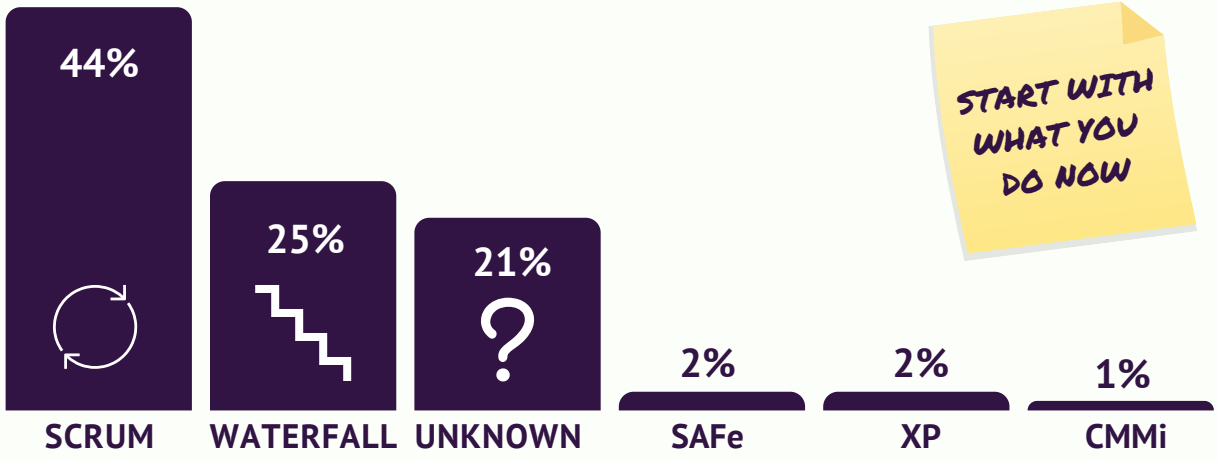
MATURITY, SCALE AND ORGANIZATIONAL USAGE OF KANBAN

How Would You Compare Kanban to Other Methods/Frameworks that You've Used?



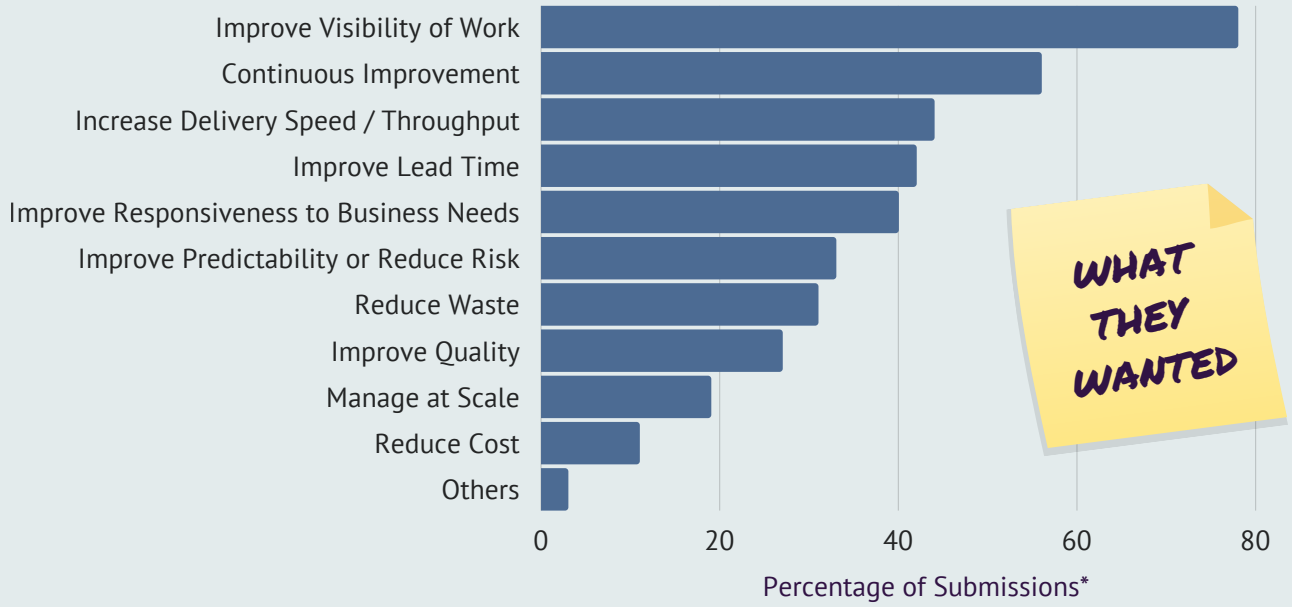
What Was Your Starting Point When You Began Implementing Kanban?

Kanban is an approach to evolutionary change. A key message that resonates from our body of knowledge is “Start with what you do now” enabling Kanban to be the "great unifier." Contrary to "frameworks" or "methodologies," Kanban is not "installed" via a "transformation." Rather it is a method for evolutionary change that occurs in small steps that can bring about significant, sustainable results. 44%, the largest group, started with Scrum. Kanban is an excellent approach to improving your Scrum. It should never be a question of Kanban versus Scrum, but likewise Scrum is not a required starting point for Kanban.

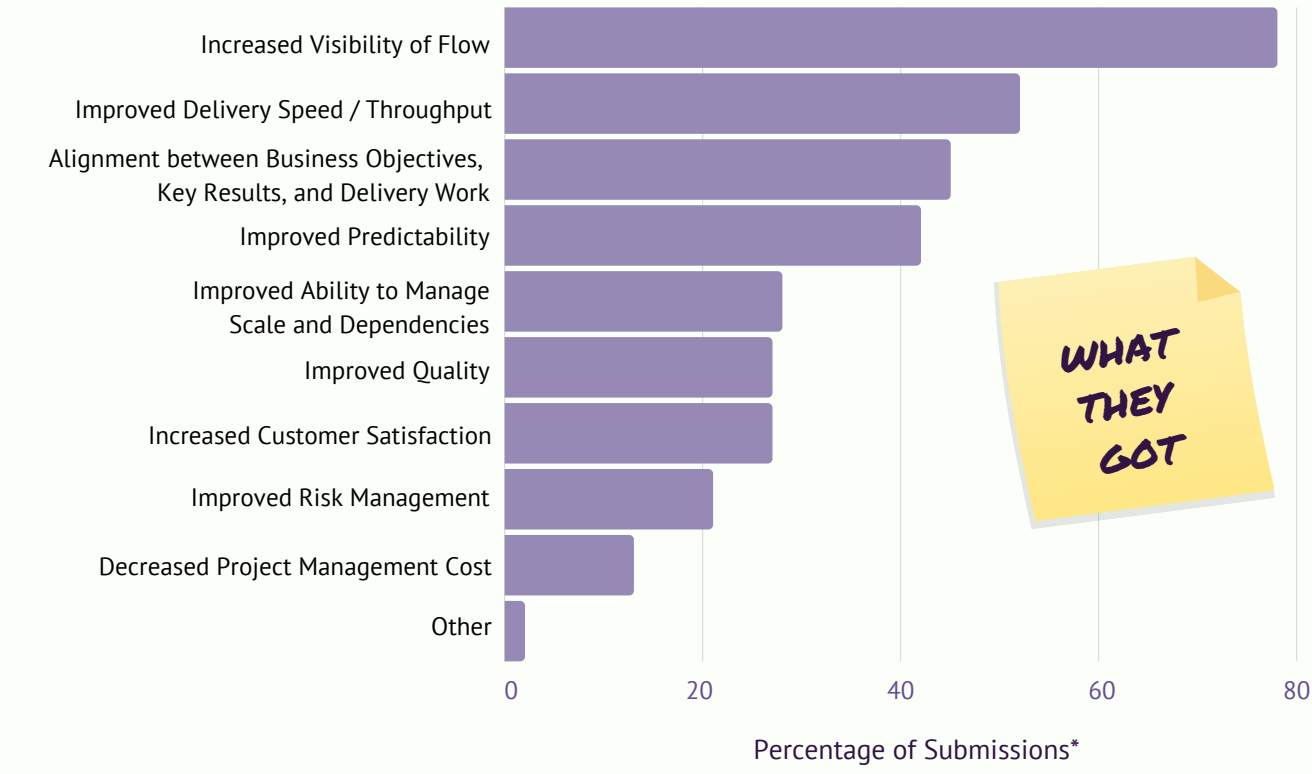


KANBAN ADOPTION

What Were Your Main Reasons for Adopting Kanban?



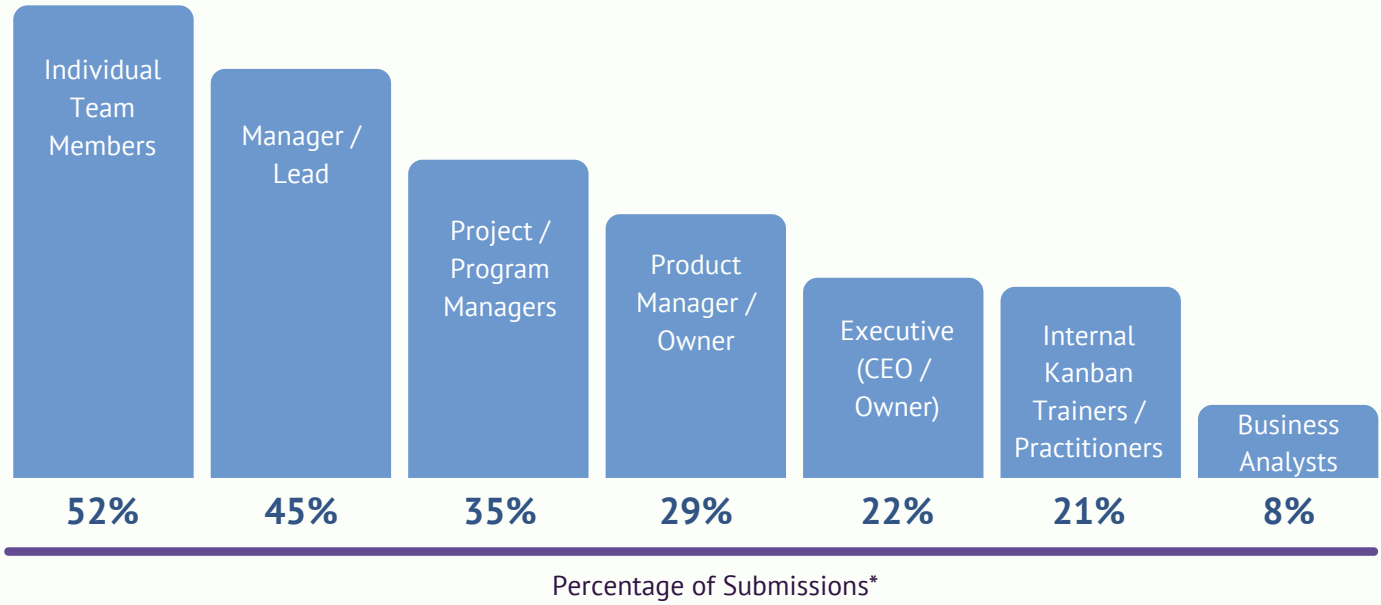
What Have You Seen as a Result of Your Kanban Initiative? Main Benefits of Adopting Kanban



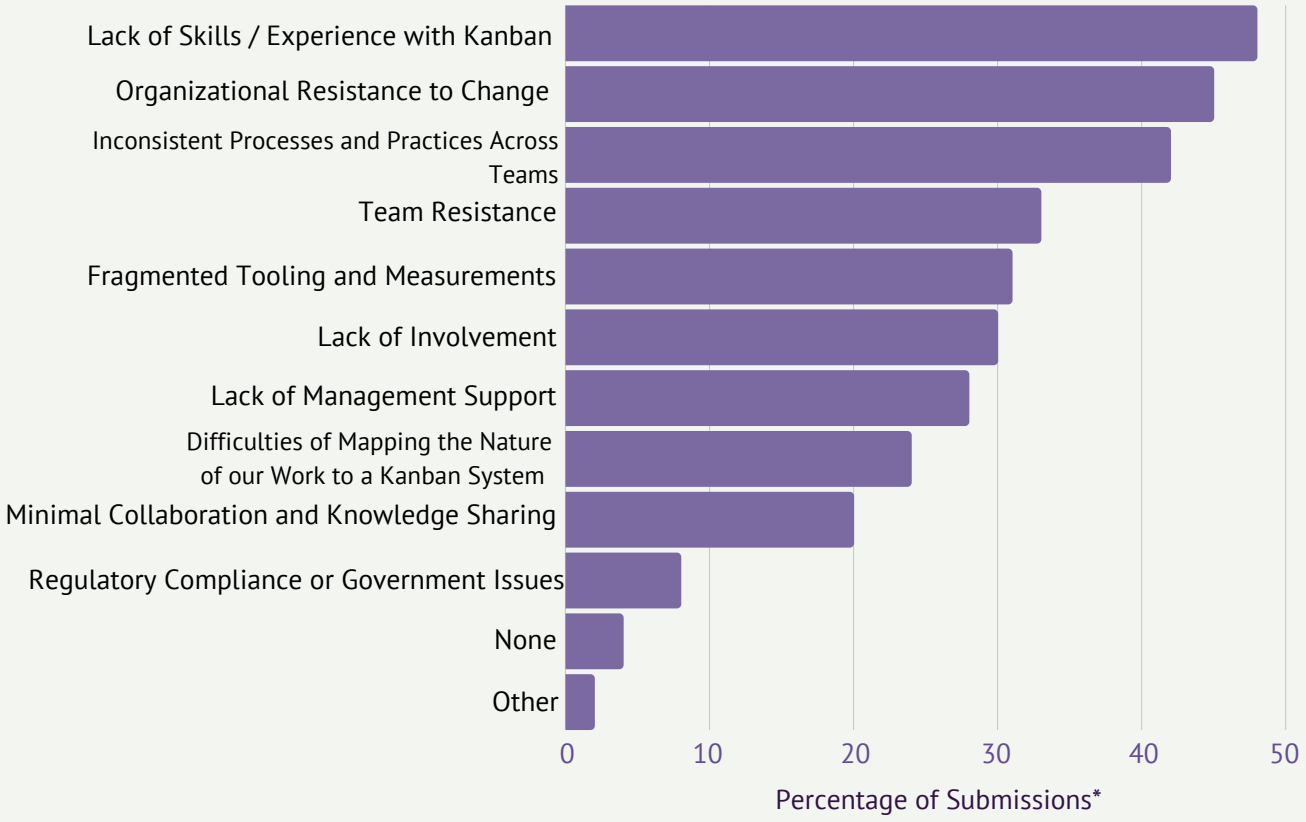
*Respondents could choose more than one option.

KANBAN IMPLEMENTATION WITHIN COMPANIES

Where Have Your Kanban Implementation Initiatives Seen the Strongest Organizational Support?



What Are the Challenges You Have Experienced with Adopting Kanban?



*Respondents could choose more than one option.

KANBAN ADOPTION

49%
YES, within the same and other functional areas

36%
YES, within the same functional areas

15%
NO

Do You Plan to Expand Your Kanban Implementation in the Next 12 Months?

Adoption and use of the Kanban Method practices is growing within organizations. More than 85% of respondents indicated that their organizations intend to expand their adoption within the next 12 months.

In Which Functional Areas Do You Plan to Expand Your Kanban Implementation?

*Respondents could choose more than one option.

TOOLING

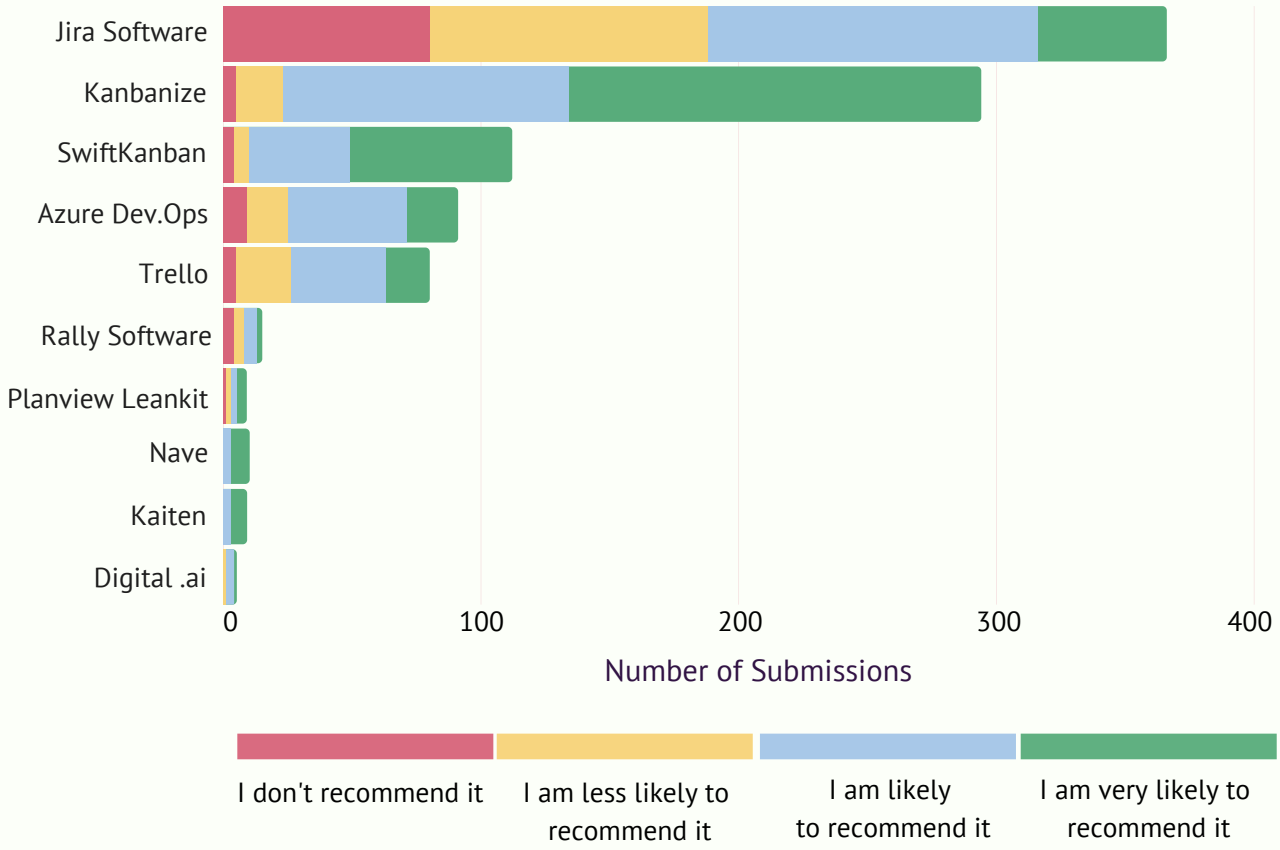
The three most used tools included Atlassian Jira, Kanbanize, and Digité SwiftKanban. While Jira was the most used tool, it is not highly recommended by respondents, likely as it is not considered to have very good support for Kanban. The tools recommended by Kanban University (Digité SwiftKanban, Kanbanize, Kaiten, and Nave) are all highly recommended and considered to have good support for Kanban practices.

Swift Kanban from digité

kanbanize

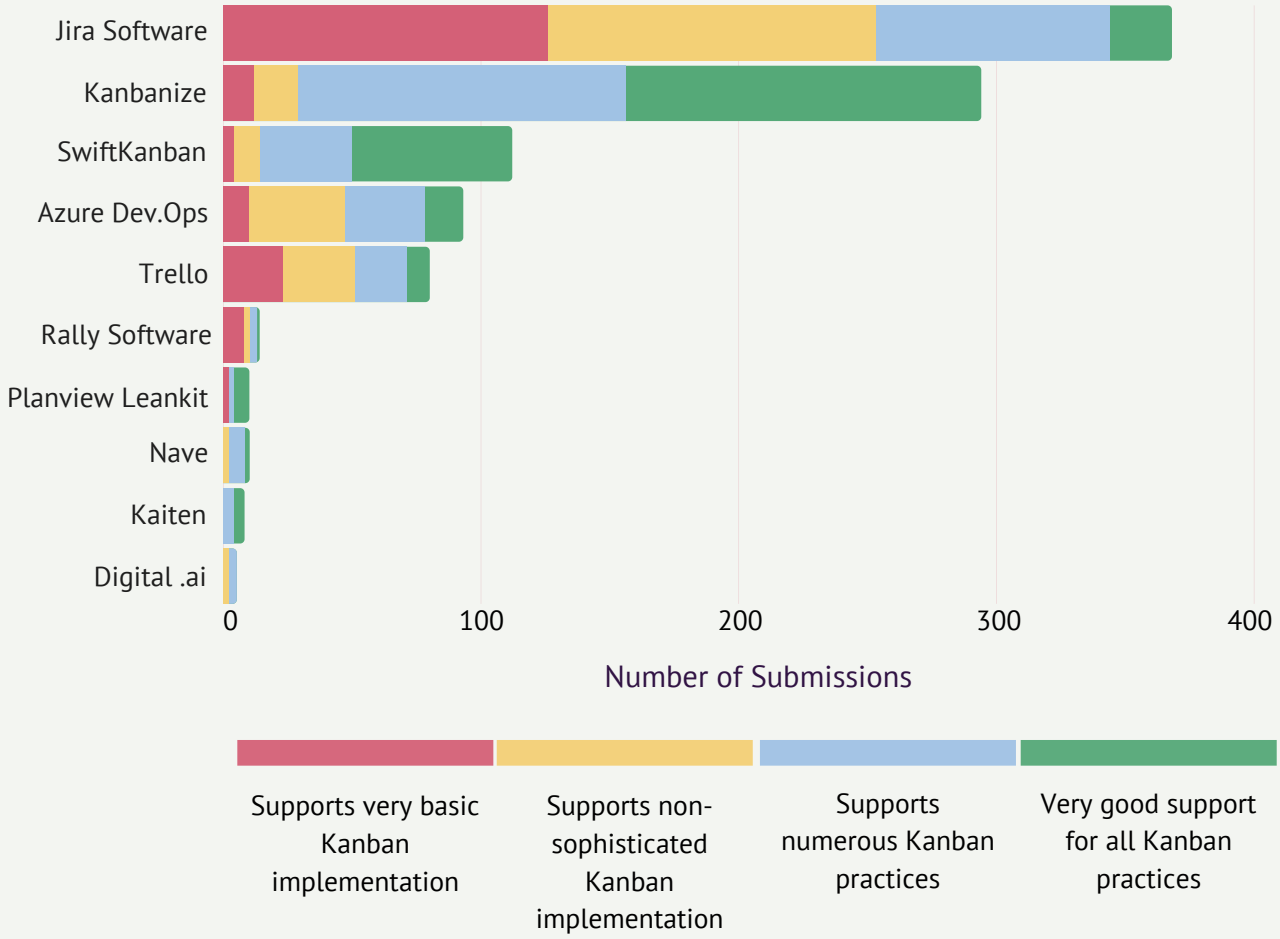
ATLASSIAN

Kanban Tooling and Likelihood to Recommend



TOOLING

How Well do You Think this Tool Supports Kanban?



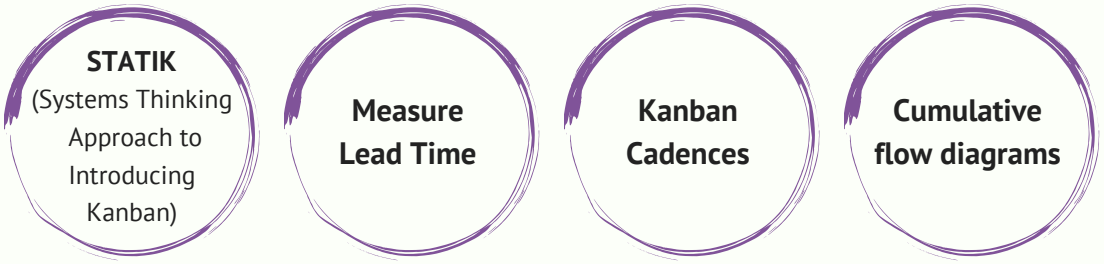
Not surprisingly, there is a strong correlation between a user's perception of how well a tool supports Kanban and their likelihood to recommend the tool. The two main outliers to this correlation are Azure DevOps and Trello, which are both moderately likely to be recommended, but acknowledged to have limited support for Kanban practices.

PRACTICE, USAGE, AND TRAINING

Does Training Have an Impact on Adoption of the Kanban Method Practices?

Earlier we saw which Kanban practices are most frequently used. We wanted to see if training has an impact on the usage of Kanban practices and if so, which ones are impacted the most.

Respondents that had taken any training class from Kanban University reported that their usage of practices was higher for every practice that we queried. The practices that showed the largest gap compared to respondents that had not taken Kanban University training were:



This data affirms Kanban University's understanding that organizational maturity and adoption of the Kanban Method practices are reflected in the relationship between outcomes, practices, and culture. The information gathered from this analysis also indicates that when employees are formally trained using the Kanban University curriculum, the company will likely benefit much more as they are more likely to adopt and make use of the Kanban Method practices. The adoption of such practices locally within an employee's working environment will greatly improve the chances of the organization's potential to mature towards greater outcomes as described in the Kanban Maturity Model.

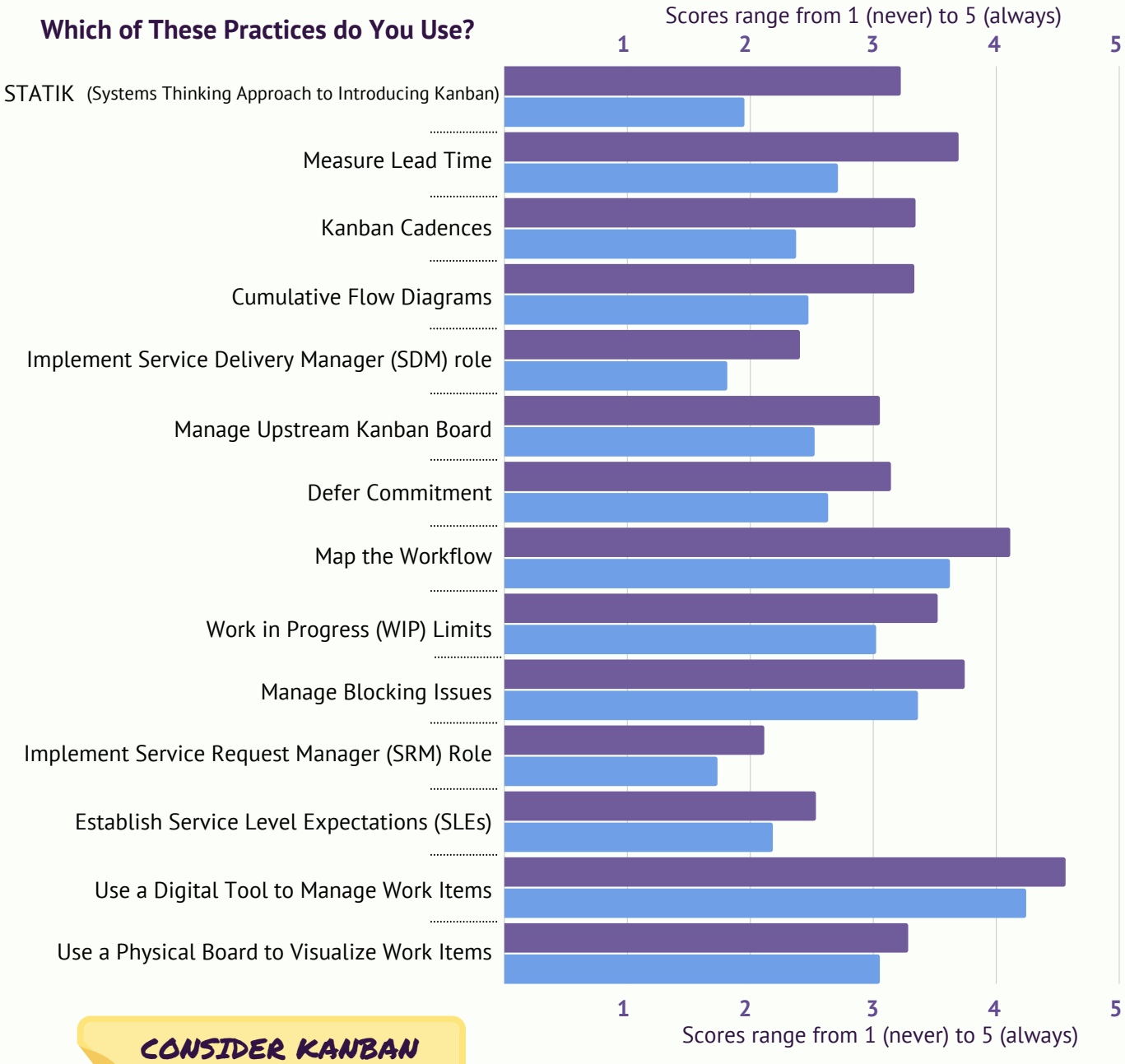
PRACTICE, USAGE, AND TRAINING

KANBAN TRAINING IMPACTS THE ADOPTION OF PRACTICES

Does Training Have an Impact on Adoption of the Kanban Method Practices? (continued)

Yes. In particular, training improves the chances that individuals will adopt Kanban within their organizations and utilize more mature practices such as metrics and cadences. Those respondents that had taken Kanban training showed significantly higher usage of each and every kanban practice compared to those who had not taken training

Which of These Practices do You Use?



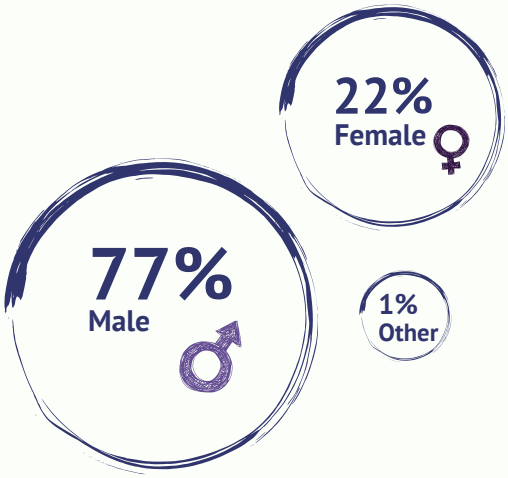
CONSIDER KANBAN TRAINING

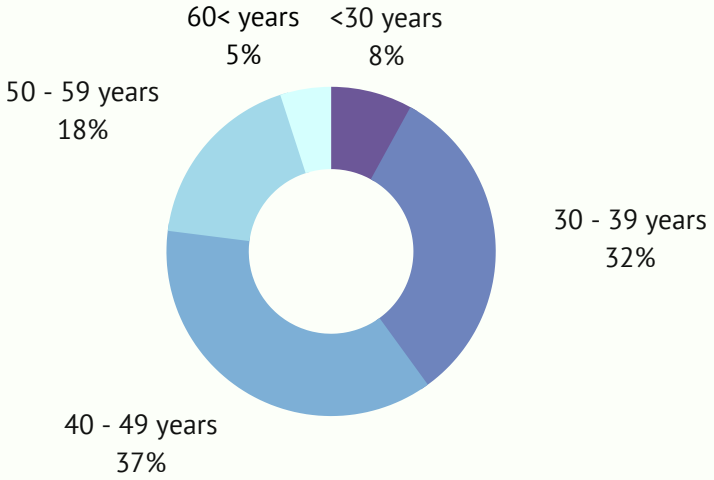
Have You taken any Kanban University Training?

Yes No

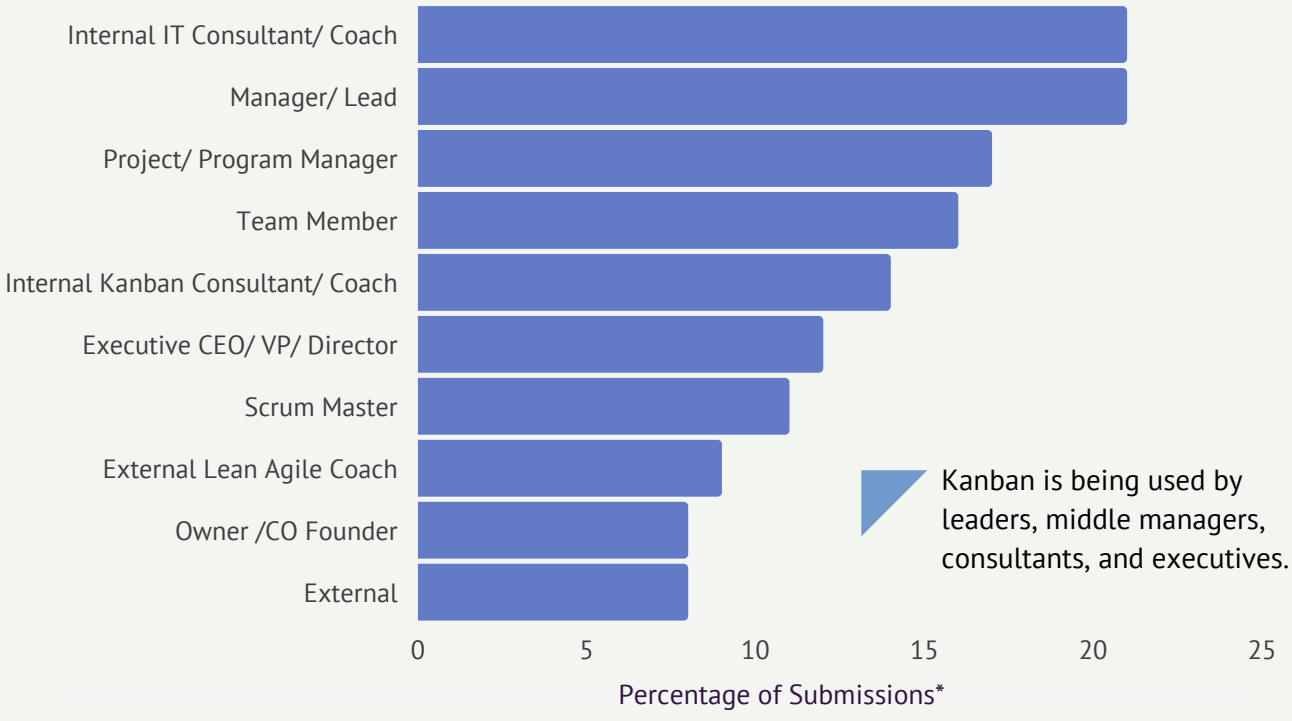
ADDITIONAL DEMOGRAPHICS

Respondents: Gender and Age





Top 10 Job Titles

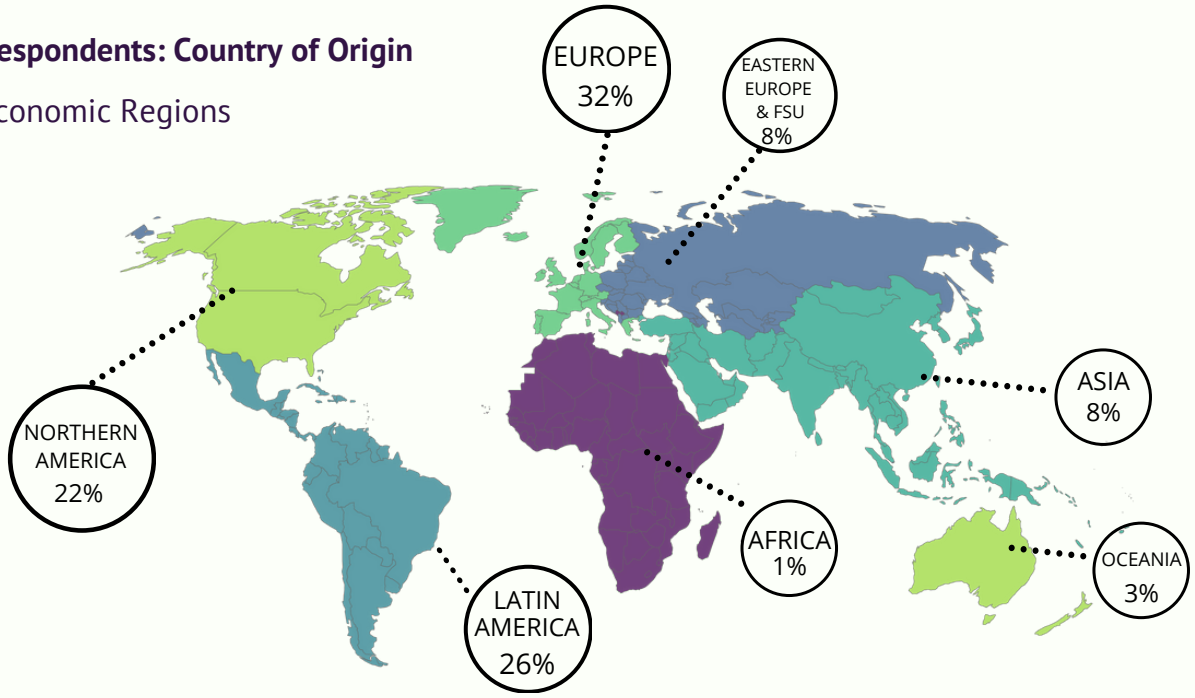


*Respondents could choose more than one option.

ADDITIONAL DEMOGRAPHICS

Respondents: Country of Origin

Economic Regions



All Countries

Brazil	209
United States of America	184
United Kingdom	93
Germany	93
India	60
Canada	56
Spain	53
Mexico	34
Russia	23
Italy	19
Australia	19
Netherlands	18
Poland	16
Switzerland	12
Austria	12
Bulgaria	11
Portugal	11
Peru	11
South Africa	10
Turkey	10
Ukraine	9
New Zealand	9

Ireland	8
Colombia	8
France	6
Denmark	5
Belarus	4
Argentina	4
Venezuela	4
Romania	4
Chile	3
Sweden	3
Lithuania	3
Norway	3
Belgium	3
Kazakhstan	2
Egypt	2
Afghanistan	2
China	2
Guatemala	2
Slovakia	2
United Arab Emirates	2
Greece	2

Luxembourg	2
South Korea	2
Serbia	1
Uruguay	1
Ecuador	1
Zimbabwe	1
Iceland	1
Slovenia	1
Croatia	1
Kuwait	1
Estonia	1
Iran	1
Qatar	1
Thailand	1
Saudi Arabia	1
Malaysia	1
Singapore	1
Sri Lanka	1
Armenia	1
Czech Republic	1
Panama	1

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