KanBo Governance Series

KanBo Pre-Deployment Planning Guide

Key Learnings:

✓ How the governance of KanBo is a cornerstone of deployment and adoption success.

✓ The top 6 pre-deployment KanBo Governance considerations.

✓ Future considerations for long-term KanBo Governance.

✓ Practical tips to get you started

Summary:

KanBo is powerful and agile work coordination and collaboration platform that is deployed on top of Microsoft Technology Stack either on-premise or on Office365/Azure.

The Pre-Deployment Planning does not require any full-blown specification. By following some simple rules and measures you will boost user adoption and enhance user experience equipping your organization with an operating system for work that will help you lay down the fundamentals to create a dynamic robust enterprise.

This guide provides you with the top considerations related to KanBo Governance as you embark upon your journey of transitioning work coordination to KanBo.

KanBo Overview

Initially launched in 2012, KanBo is a work coordination software for Self-Organizing teams with the purpose of giving people more time for accomplishing the work that matters most and reducing the "work about work".
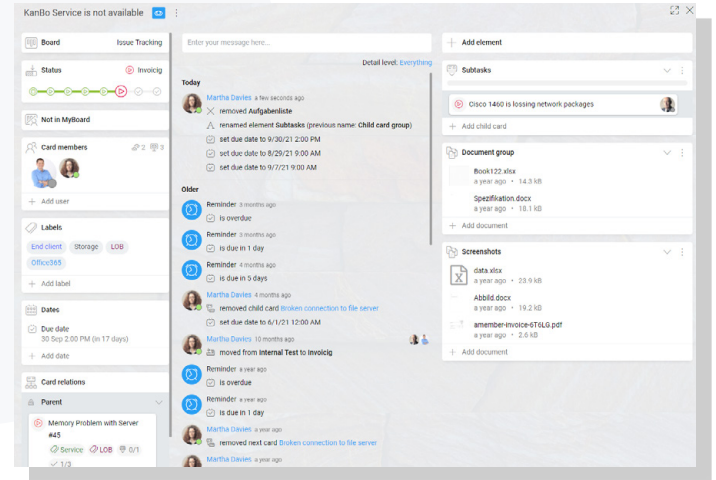
KanBo uses a powerful technological stack of Microsoft and integrates natively with a variety of products including SharePoint, Teams, Exchange, Office, Active Directory, and more.

KanBo's advanced real-time visualization of work makes work management highly engaging and efficient. It allows organizations to get real-time updates and see potential roadblocks before they occur and drill down to individual tasks or zoom out for a holistic view of everything in the portfolio.

It is also a powerful and versatile communication and collaboration platform that serves as a teamwork hub by combining chat, meetings, file storage (accessible securely through OneDrive from everywhere), and integration with many other apps.

The modern workforce is more mobile and remote than ever, working in different places, on different devices, and in different time zones. KanBo is the best platform to support this new era of remote work and collaboration for enterprise-class organizations.

FOR EXECUTIVES: KanBo delivers comprehensive top-down visibility into projects, portfolios, KPIs, and initiatives underway through a single-pane of glass. KanBo effortlessly enables being in the know, based on the most recent information available. It is an all-in-one application integrated into your secure infrastructure.

FOR MANAGERS: The flexibility of KanBo allows them to track tasks, deadlines, files and conversations in one place. KanBo helps them reduce the level of interruptions by personalizing their notifications to what matters now. It enables them to track progress against the overall timeline, identify and act on discrepancies immediately.

FOR INFORMATION WORKERS: KanBo focuses on work and makes work more social. When content, documents, conversations, and colleagues are combined in the context of cards, workloads can be managed and completed more quickly and comprehensively. Following topics, lists, cards, and boards to get information on what you care about the most, in real-time - that's what KanBo is all about!

KanBo can be a game-changer for your organization – as long as you think through, plan and deploy governance around KanBo and the rest of the Microsoft infrastructure in a thoughtful manner.

KanBo
AHEAD OF CHANGE

Top 6 KanBo Governance Pre-Deployment Considerations

1. KanBo Naming Conventions

If you think controlling how users name individual KanBo Boards seems over the top, just think back to anytime you've struggled to find a file or document because you weren't sure what it was named. Naming conventions can help to ensure that users can always find the KanBo Board they are looking for, should it exist.

Additionally, using a defined naming convention provides a clue to users (and your IT department) as to why a KanBo Board was created in the first place and what information it holds.

Here are a couple ways to define your naming policy for KanBo Boards:

Prefix-Suffix KanBo Board Naming Policy

With the prefix-suffix naming policy, you can use prefixes or suffixes to define the naming convention of KanBo Boards and Office 365 Groups. Prefixes and suffixes can either be fixed strings, like "DE_", like "DE_Hamburg_Engineering".
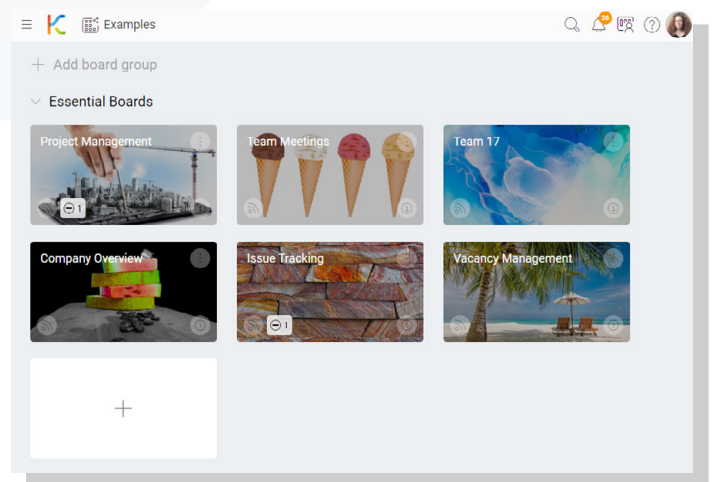
Or, you can use user attributes like [Department] that get substituted based on the user that created the group using information from Active Directory.

Blocked Words for KanBo Board Creation

You can also upload a list of blocked words to prevent anyone from misusing KanBo Boards - either purposefully or by accident. These words will be blocked in KanBo Boards created by users. Words like "payroll" or "HR", for example, are often blocked to prevent users from appearing to be part of a department they are not associated with.

Additionally, some companies choose to block words deemed offensive or inappropriate. You can use your imagination or past experience for examples to add these blocked words from KanBo Boards creation.

2. KanBo Board Creation & Access

Your organization's investment in KanBo deployment and Microsoft infrastructure can be optimized if you enable your team members to have more control over provisioning. The increase in participation directly translates into successful deployment.
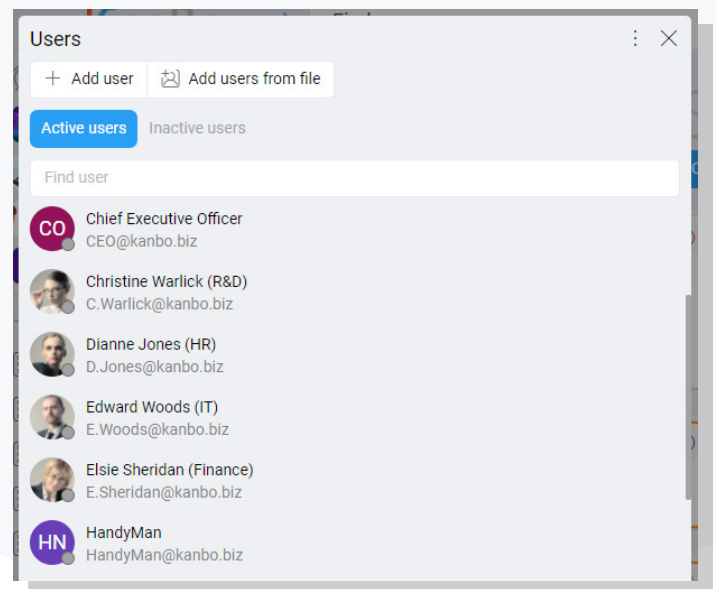
That being said, the authority of creating new Boards in KanBo, Site Collections in SharePoint, and Teams in Microsoft Teams should be given to properly trained People with adequate supervision and oversight.

Achieve a Balance

Management of controlling access and provisioning should be sufficiently effective to ensure the creation procedure complies with the organization's internal policies. On the other hand, the creation process should also remain quick and user-friendly so your employees can get the job done without requesting any assistance from IT which then becomes a bottleneck. It will be your organization's job to find the right balance between total control and total freedom over the process, however, it is suggested that a business should enable as many employees as possible to create KanBo Boards for optimal efficiency and adoption.

RECOMMENDATION
You can come up with a certification program or series of trainings that should be completed to earn the privilege of creating a Board in KanBo. This will not only elevate the level of freedom but provide a sense of achievement and responsibility.

External Guests

Being versatile work management and collaboration software, KanBo allows you to work with "guests" who are basically external users with the permission to access specific KanBo Boards. This enables the organization to share relevant information and collaborate with external stakeholders but also carries security risks. The organization will have to make the following decisions:

- If they will allow external parties/guests to access KanBo Boards
- Who will have the authority to invite these guests
- What type of permission the guests will have once they can access your organization's KanBo Boards

Regular Accessibility Assessments

Depending on the sensitivity level of the KanBo Board, which can be specified within KanBo or inherited from the corresponding Office 365 Group, you can set policies that will create tasks (Cards) with a predefined structure of steps to be performed regularly by KanBo Board owners in order to ensure that only authorized people have access to the KanBo Board at any given time.

3. KanBo Board Template Directory

Once the right People have the authority to create Boards, you should ensure they can tap into the pool of existing knowledge in your organization and start benefiting from predefined structures and information instead starting every time from scratch.

You will need to take into account if you just want to rely on KanBo Boards or if it would be beneficial to extend KanBo Boards using a predetermined Channel structure through a specific Microsoft Teams template or a SharePoint Site theme, design, or structure.

KanBo supports all combinations as it is based on the same underlying infrastructure which Microsoft uses for its applications – i.e. Office 365 Groups or SharePoint Site Collections (on-premises).
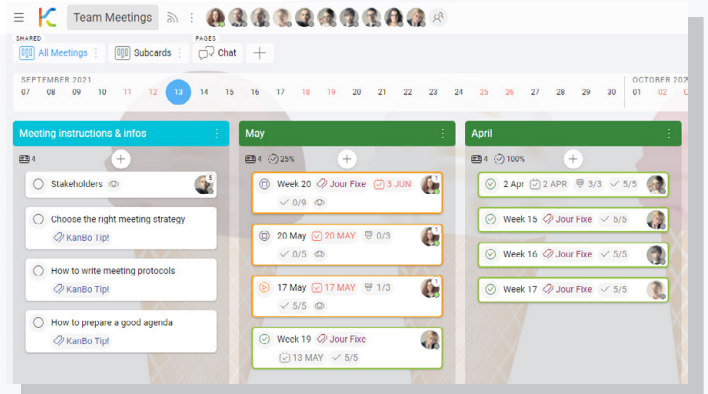
KanBo Board Templates

One of the core challenges of today's organizations is to strengthen its capabilities to become a learning and innovating organization, sharing experience on enterprise level as well as amongst engaged employees. People should not reinvent the wheel all over again especially if the specific knowledge is already present within the organization – and that is the underlying concept of KanBo Board Templates.

Creating a KanBo Board can be accomplished in three different ways – right from scratch as an empty

IT Contracts Management

An easy way to manage IT contracts by defining user needs, goals, & expectations and handling details such as deadlines, contract status etc. with support for auditing, renewal, analytics and more.

Board, copying a Board that already exists, or relying on a KanBo Board Template. To achieve a uniform and cohesive structures across KanBo Boards that are used within your organization, it is recommended that you include KanBo Board Templates in your Governance plan.

KanBo Board Templates are pre-built definitions of work structures including file folder structures designed around a business need, a project, or a process. They let users quickly create KanBo Boards enabling the best flow of work for a given purpose including list structures, document templates, and labels for different pre-selected topics and use cases.

Everything you need for preparing your Governance plan is included within KanBo itself and you don't require any other tools. This applies to KanBo Board Template management as well as to other KanBo Governance points in this document. KanBo Board Templates are like regular KanBo Boards with some extra features added or disabled to get the best possible combination for building predefined structures to get work done. They include knowledge and experience already discovered by other teams or projects as predefined sets of KanBo Cards (or even KanBo Card Templates) representing all work that needs to be done or considered in order to finish a project or process.

KanBo Cards can contain checklists, notes, tips, and document templates needed to accomplish the work represented by a single card. KanBo Cards can have dependencies between them, predefined due dates, milestones and so on. Basically, all that the team that created KanBo Board Template knew, is put into small, actionable pieces – aka KanBo Cards.

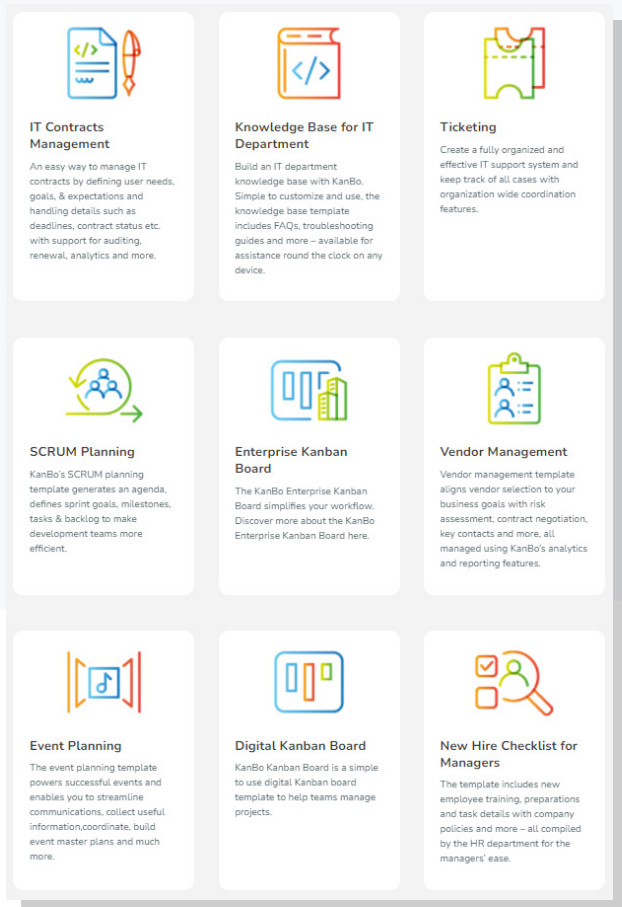*Nothing is particularly hard if you divide it into small jobs.*

Henry Ford

The communication and collaboration amongst the experts' team during the creation of KanBo Board Templates itself takes place within that very KanBo Board Template. Using the granular access to each KanBo Board Template you can ensure that only specific people can design new or change existing KanBo Board Templates. You can also give dedicated users access to particular KanBo Board Templates so only a certain group of people in your organization will be able to create new Boards out of these KanBo Board Templates but not be able to change them. In most cases you will set a KanBo Board Template as public giving the entire organization the permission to use it when creating new Boards and so lay down the foundation for knowledge sharing and unprecedented synergies.

Additionally, KanBo Board Templates come with version control. You can publish a certain stage of a KanBo Board Template and continue to optimize and improve it, but no one will be able to create KanBo Boards based on a non-published KanBo Board Template, which gives you peace of mind and time to think things through until you can release the next version to the rest of the organization or a dedicated group of employees.

Organization-wide KanBo Board Template Library

There are several ways how you can build up, present and maintain a KanBo Board Template Library or Catalogue for enterprise organizations. The most practical and logically closest method is to create a dedicated, organization wide available KanBo Board inside of your KanBo Application itself for all KanBo Board Templates available for your organization.

Each KanBo Card in that Board represents one KanBo Board Template. It also includes other

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Knowledge Base for IT Department

Build an IT department knowledge base with KanBo. Simple to customize and use, the knowledge base template includes FAQs, troubleshooting guides and more – available for assistance round the clock on any device.

Ticketing

Create a fully organized and effective IT support system and keep track of all cases with organization wide coordination features.

SCRUM Planning

KanBo's SCRUM planning template generates an agenda, defines sprint goals, milestones, tasks & backlog to make development teams more efficient.

Enterprise Kanban Board

The KanBo Enterprise Kanban Board simplifies your workflow. Discover more about the KanBo Enterprise Kanban Board here.

Vendor Management

Vendor management template aligns vendor selection to your business goals with risk assessment, contract negotiation, key contacts and more, all managed using KanBo's analytics and reporting features.

Event Planning

The event planning template powers successful events and enables you to streamline communications, collect useful information, coordinate, build event master plans and much more.

Digital Kanban Board

KanBo Kanban Board is a simple to use digital Kanban board template to help teams manage projects.

New Hire Checklist for Managers

The template includes new employee training, preparations and task details with company policies and more – all compiled by the HR department for the managers' ease.

information like the link to the KanBo Board Template itself (from where you can create your board out of it), a description of what it does, what is it for, how to use it, see the team that built it and some labels or other tags for better findability.

A KanBo Board like that serves not only as a Catalogue of predefined and ready to use solutions for any possible business need but also as a place where employees can create requests for new KanBo Board Templates or discuss changes and improvements to existing ones. The matter of expert teams can inform and collaborate with all followers of KanBo Cards representing KanBo Board Templates about upcoming changes and other related things keeping all interested people informed.

Additionally, organizations can use KanBo Board Collections to build predefined sets of KanBo Board Templates designed for certain areas of business like engineering, specific country or department for a better presentation of available solutions.

4. Important Enterprise Level Predefinitions for KanBo

In order to gain the most of your KanBo investment and ensure a sustainable success, there are some settings and definitions that need to be prepared before you roll out KanBo to the entire organization.

They're not mandatory for working with KanBo but if you prepare them prior to the roll-out, you will have more possibilities, gain more insights, and increase user adoption.

Define and keep your global roadblocks up to date for better insights

In KanBo Global Settings, you can enter predefined reasons for Blocks which can be later used by employees to select a certain reason for obstacles they are encountering. They can easily block cards because they cannot continue to work on them for the reason that is hindering them. Block definitions can be created on Global-level (by Management) and on Board-level (by Board Owners).

Later when you review what's blocking your organization the most across all Boards, you will only see the globally defined Blocks – not those from Board levels. Some of the common reasons used by our customers as global Block definitions include: COVID-19, Customer delay, Supplier delay, Weather, IT Related, No reaction of [name of department], etc.

Leverage your central Document Templates in KanBo

Whether your organization has one central or multiple repositories for your Document Templates, you should register them in KanBo as Document Template Sources. By doing so, you
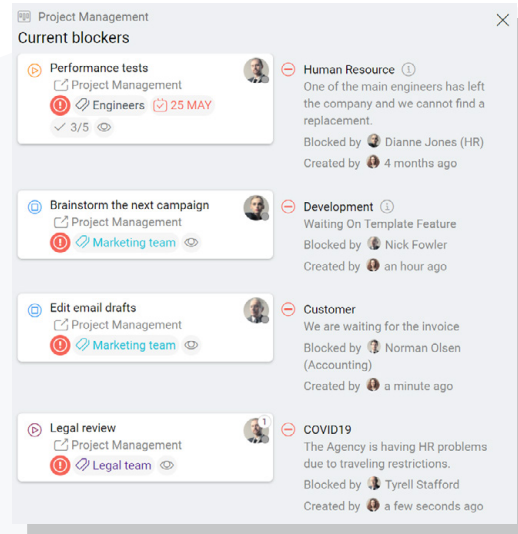
will empower your employees to find the right document templates right in the cards where they are working on their tasks when they need to create documents or fill out forms.

Your process development team of your organization will be able to create card templates or board templates that will be already associated with the appropriate document templates coming from your central repository without making any disconnected copies of them. The employees will never have to look for the document template in the right version as it will be in the card where they work. Investing in this particular predefinition has a very high ROI.

Change KanBo Styles to fit your Corporate Identity

You can also customize your overall look and feel theme across KanBo. You can change the KanBo default colors to your company colors and upload your company logo. You can even add more colors than 16 which are default. Besides that, you have the possibility to replace the background images included by default with your own background images that users can choose as backgrounds for KanBo Boards.
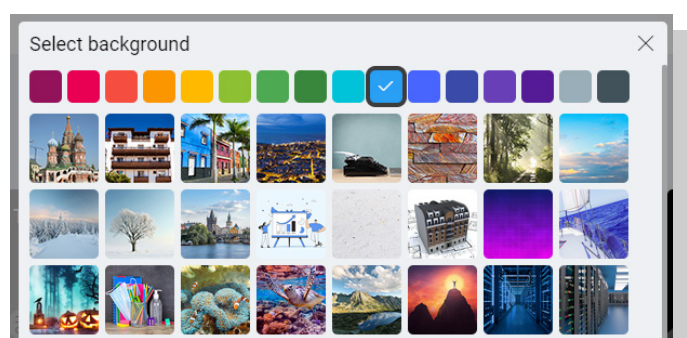
5. Setting Retention & Expiry Policies in KanBo

KanBo Governance also involves considerations regarding the management of your organization's content lifecycle. This includes the processes of importing, storing and sorting business-critical data so you can make quick but informed decisions about what needs to be kept and what needs to be deleted. Apart from that, you will also need to take data protection, records management, and data loss prevention into account.

KanBo Boards Retention and Expiry

Regardless of the effectiveness of your organization's KanBo Governance policies, you will end up with at least a few unutilized or under-utilized KanBo Boards. As a default setting, every KanBo Board remains in the KanBo platform unless it is deleted by the Board owners. However, you can specify conditions for Board expiration to make sure there are no unused KanBo Boards that lead to clutter and unnecessary burden. In an Office 365 environment, KanBo Boards are managed through Microsoft 365 Groups which means that Office 365 Group expiration guidelines by default apply to KanBo Boards.

KanBo itself also has a very rich feature portfolio within the Retention domain. The platform can react to certain dynamic, time-based triggers such as no activity or no visits (read-only) for a certain period of time in a KanBo Board.

To manage such situations, you can design your own expiration policies and bind them to KanBo Board Templates or certain metadata that is attached to Boards.

This way you can ensure that the information contained in the KanBo Boards is handled according to polices of your organization. The retention process is scalable to meet enterprise-class organizational needs and users do not have to be bothered with any additional work as retention is taken care of automatically.

EXAMPLE
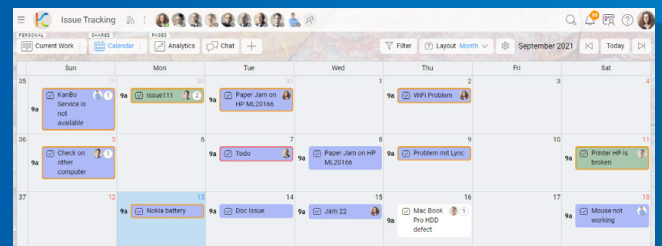
Implementing an expiration policy for KanBo Boards demands you to specify the duration – basically the period after which a Board expires if there are no new activities. The owners will be notified to renew such KanBo Boards 30 days, 15 days, and 1 day prior to the Board expiration for no activity reason.

The owners can go to the Board Settings and select the "Renew Now" option to prolong it by 90 days. In the event of inaction, the Board will get closed for a period of 30 days during which the owner can choose to restore it but the Board is READ ONLY in that state. If you want to have continued access to the data contained within a certain Board, you can export that Board. Any exported Board can be restored later.

## Other KanBo expiration policy settings

Another crucial factor that should be taken into consideration is handling and management of the data shared through KanBo Boards. Retention policies specify the duration for which KanBo Board's content will remain accessible before being deleted. If your organization is using KanBo MyBoards, you can define this setting on a global scale or by the user. On the other hand, for KanBo Boards you can set it globally or by KanBo Board. File retention policies can be specified in SharePoint and OneDrive.

Office 365 Data Loss Prevention

Data Loss Prevention (DLP) involves ensuring the security of sensitive documents and information present in Office 365. Since KanBo has been primarily designed to leverage the Office 365 infrastructure, every file or document you create or upload to KanBo is governed by DLP automatically. If you are concerned about protecting your organization's sensitive information and documents, defining DLP policies will allow you to ensure employees don't share sensitive data with unauthorized people through KanBo or any other application within the Office 365 ecosystem.

eDiscovery

eDiscovery entails the complicated process of finding and returning digital information from Office 365 that can be used as evidence in legal proceedings. You can rely on search of all of your work, tasks, and projects, and identify content that could potentially be relevant to the ongoing case. Using eDiscovery tools, you have the ability to redact sensitive parts of the information and use electronic retention policies to secure your content. You can set the read-only mode for a KanBo Board (Board Closing) for legal purposes.
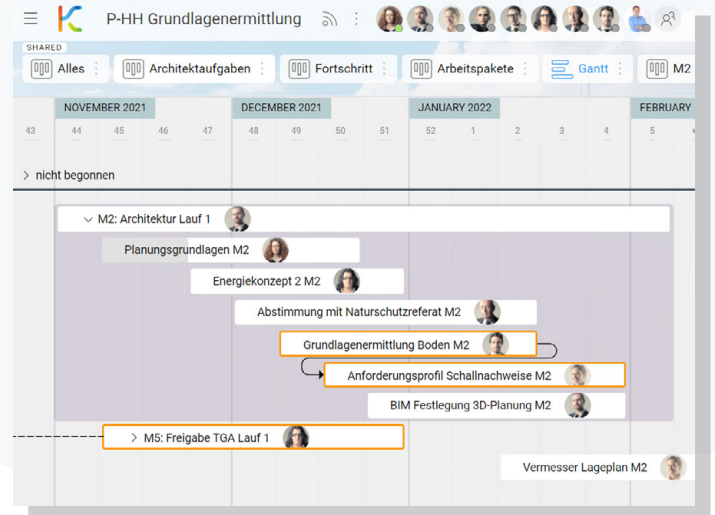
6. KanBo User Adoption Insights

To ensure you are acquiring optimal use from your KanBo deployment, consistent monitoring is quite important. Fortunately, it is a quick and convenient process to monitor how your team members are using KanBo in different ways with feature-rich, insightful, and built-in reporting tools.

With KanBo Actionable Insights, you can better understand the usage and adoption patterns of KanBo in your Enterprise allowing the leadership to take immediate evidence-based action to maximize ROI.

It also gives visibility into KanBo Boards activity, work progress, member interactions, external users and even sentiment tracking. All KanBo data can be augmented with information from HR information systems such as role, region, and organizational structure for deeper insights into organizational usage patterns.
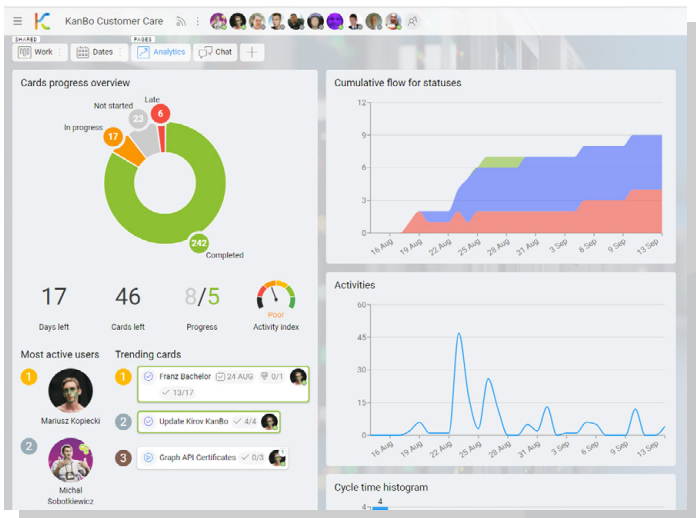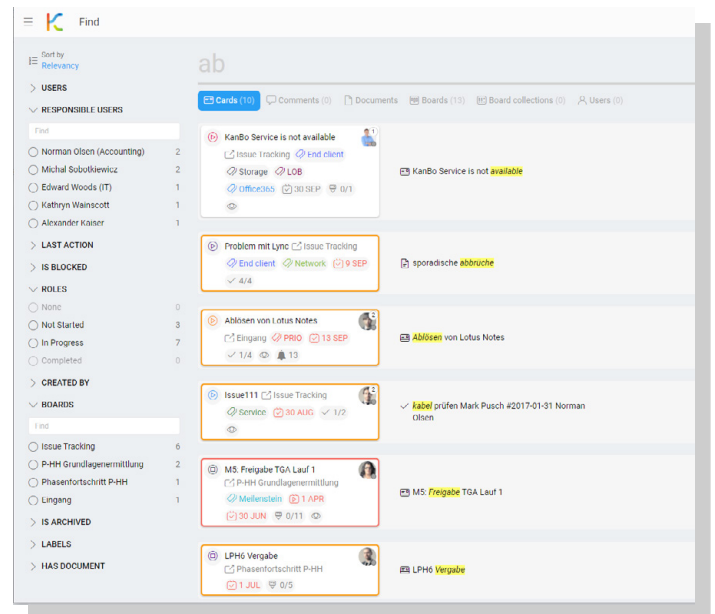
KanBo User Adoption Insights help the management make business decisions with a better understanding of where adoption has happened, what are the best ways to support the user community, and where they need to provide more training, encourage communication, or even learn what needs to be changed in the current approach or process.

KanBo Boards Reporting

This part of the module focuses on listing all Boards with metadata like activity indexes, last activity timestamps, visits per day or per month, number of comments or card movements during a certain period of time, number of users, number of owners, used file storage, external users, closed attribute, board creator, and other telemetry information.

Using all these attributes for sorting and filtering will help you to identify Boards of your interest where you might be in need to bulk message its owners with a custom message that will be put into Boards' chats or delete or archive the identified Boards because of inactivity, manually.

KanBo Users Reporting

This is the User-focused part where you can list all users with information about their activity, last actions in KanBo, Boards they have access to, KanBo license type, combined information from HR, whether they are internal tenant users or external. Moreover, here you can use bulk functionality to perform actions on multiple users at the same time.

Practical Tips for Starting with KanBo Governance

Tip 1: KanBo organization-specific training and certifications

Use your internal training platform to create a series of trainings to teach and prepare employees for responsible self-creation of KanBo Boards. If possible, achieving the certificate could automatically enable the specific KanBo Role required for the self-creation of KanBo Boards utilizing KanBo's powerful API or through KanBo Power Automate actions.

Tip 2: Board Templates library

Create a organization-wide KanBo Board for all available Board Templates. Prepare it yourself from scratch **or download this simple** structure to get started. Download some of the **publicly available Board Templates** from our website and change them to fit your internal requirements. It is essential to populate the Board Templates Library with some set of 10-15 Board Templates.

It is crucial that before you start promoting them, you should have some content (Board Templates) in place. Use your internal communication platforms (Yammer, Intranet, Newsletter, etc.) to let people know about the Board Templates Catalogue, it will grow over time and become a place to share and find organization-specific solutions.

Tip 3: Change KanBo branding to fit your corporate branding

Ask your internal communication or marketing department to have your corporate logos and background images prepared to welcome employees in an appealing way. Eventually, you could change or add additional colors to color-code Lists, Statuses or other KanBo elements. Including corporate background images or images of company products for KanBo Board backgrounds will definitively strengthen the spirit of being part of something bigger.

# Tip 4: Create a KanBo Board with News about a variety of topics

Create a public KanBo Board for your entire organization or several KanBo Boards for each region or vertical with a news topic structure (you can download an **exemplary KanBo Board Template** for it from our website). Each card represents one piece of news with links and additional content. If you enable comments or the self-join feature, then you can create a feedback channel for users commenting on the cards (News). Besides that, people can start following news (cards) or even news categories (lists) in order to stay actively informed about recent updates and developments.

Tip 5: Define Card Blockers on Global Level

Think of all the reasons you would like to know about that slow your organization down or other roadblocks that your employees encounter while working. By defining them globally, KanBo is pushing them down to all KanBo Boards – existing ones as well as new ones. When someone discovers a problem and cannot continue then the person creates a Block on a card and chooses a Block Reason from a predefined selection of Blockers. You can monitor the number of specific Blockers and take immediate actions if a certain threshold is reached.
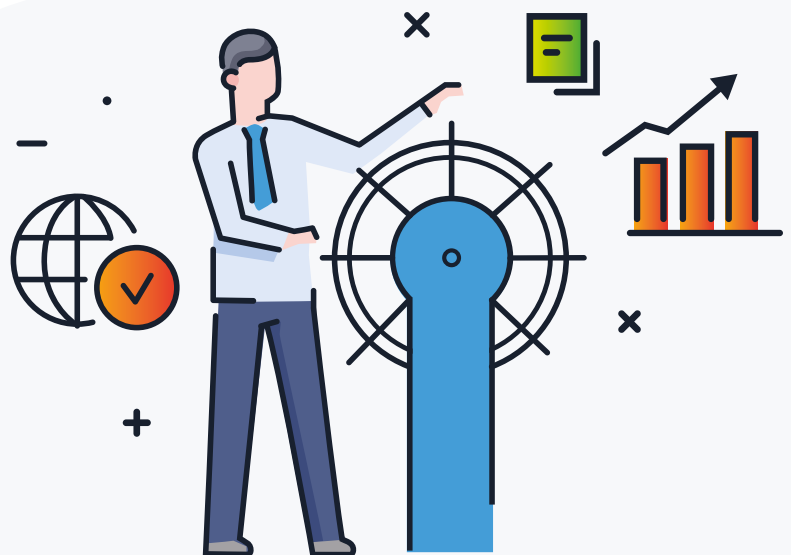
KanBo Governance Features

This document contains many of the key factors, issues, and challenges that you'll need to deliberate on prior to KanBo deployment, but it should be kept in mind that governance will not end with deployment. It is an ongoing process that enables organizations to enhance adoption, improve usage, and implement change management for businesses using KanBo and Microsoft 365 infrastructure. With the right execution, governance enables your organization to keep KanBo user-friendly and intuitive allowing users to collaborate in real-time while ensuring high productivity with access to the right KanBo Boards.

This may appear to be a complicated task, but that's exactly why we offer built-in modules for Governance to help you through this process.

For more information,
please visit **www.kanboapp.com**
or contact us at **support@kanboapp.com**.

If you would like to see KanBo in action,
please book a demonstration **here**.

You can also order a **FREE 60-day trial**
of KanBo for your environment.