

# Kanban Board

**The Ultimate Solution  
Within Microsoft  
Dynamics 365 CRM for  
Agile Project Management**



Microsoft Preferred Solution on AppSource

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# Preface

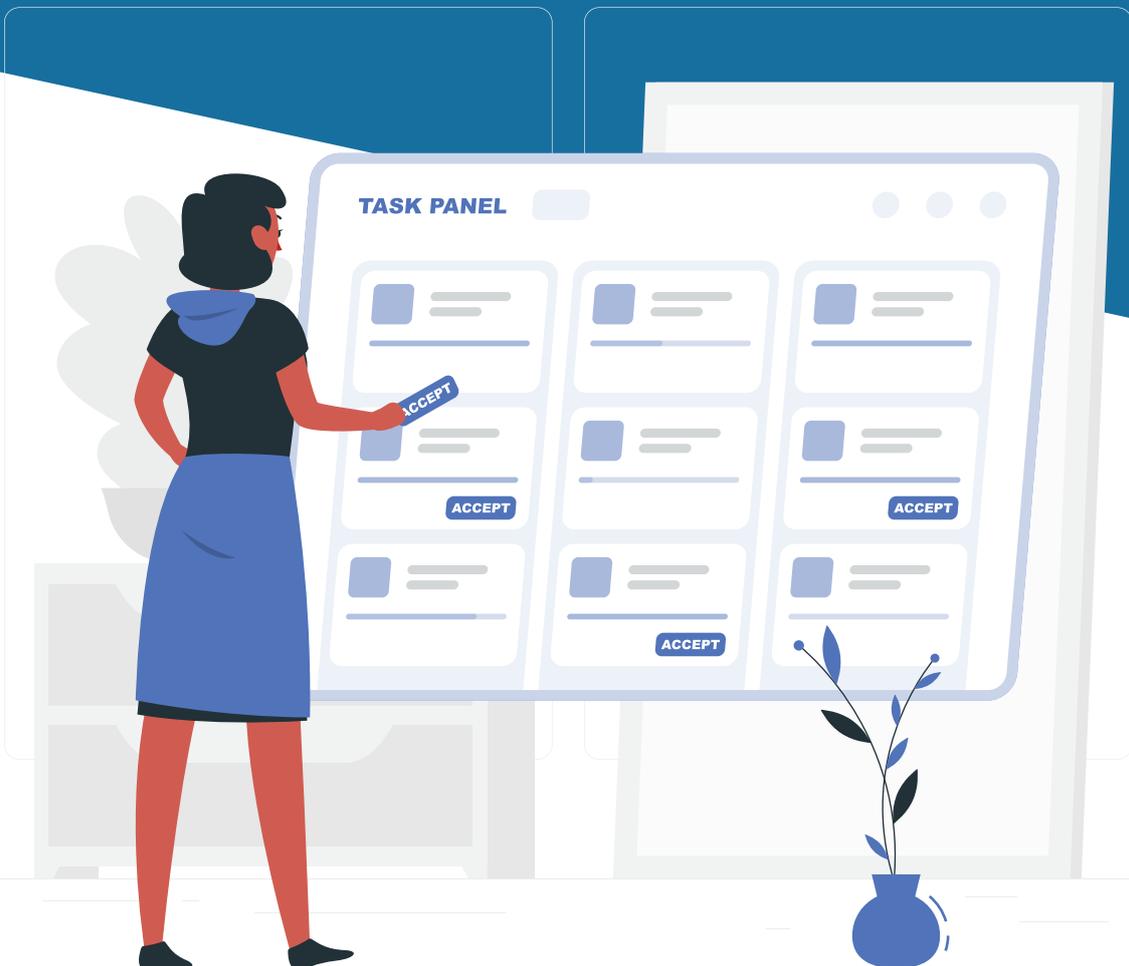
Agile project management is the default standard in software development, as it allows teams to adapt quickly to changes and deliver high-quality products in a timely manner. However, practicing true agile methodology can be challenging, especially without the right tools. Kanban Board makes this possible!

Kanban Board is a visual tool used for managing workflows in an agile project management environment. It allows teams to visualize their work, analyse work in progress, & continuously improve their processes. With its simplicity and flexibility, Kanban Board has become the ultimate tool for agile project management.

In this book, we will examine the need in agile project management environment and explore the benefits of using Kanban Board to implement agile methodology. We will guide you through the process of using Kanban Board, analyse how it helps with project planning, managing workflow, and process improvement.

We will also cover topics such as measuring success, addressing common challenges and take into account the adoption of Kanban Board as a method.

By the end of this book, you will have a thorough understanding of Kanban Board and its role in agile project management. You will be equipped with the knowledge to implement Kanban Board in your own projects, improve your team's efficiency, and deliver high-quality products.



# Introduction to Kanban Board

## Basic Understanding

The word “Kanban” is a Japanese term that means "visual signal" or "card." It was originally developed by Toyota in the 1940s as a way to manage their production line. Kanban as a structure is now widely used in various industries, including software development, to manage workflow.

A Kanban Board is generally known as a visual representation of work that needs to be done, work in progress, and work that has been completed. It consists of columns that represent the stages of a workflow, and cards that represent individual tasks. The cards move from one column to another as work progresses through the workflow.

## Kanban Board – As A Solution in Microsoft Dynamics 365 CRM

Kanban Board as a solution or a productivity app in Microsoft Dynamics 365 CRM is an excellent way to visualize work, manage it effectively, and identify bottlenecks.

This productivity app enables agile project management teams to visualize Microsoft Dynamics 365 CRM and Dataverse (Power Apps) data in Kanban view.

Card-based viewing simplifies processes and allows easy identification of the status of records with the ability to categorize the data into lanes. This tool lets you move records across lanes to quickly update the underlying field values. Further, quick actions shortcuts can be used to record activities without having to click too many times.

Although, Kanban Board is natively available in Microsoft Dynamics 365 CRM. However, the AppSource preferred app Kanban Board is a lot more advanced with amazing features! It is available as a control that can be configured in a variety of views based on your needs in Microsoft Dynamics 365 CRM and Dataverse.

## Kanban Board App for Agile Project Management

As a software development team, efficient project management is crucial for achieving success. One of the popular approaches to project management is the Kanban method, which visualizes workflow and optimizes the process of completing tasks.

Microsoft Dynamics 365 CRM is a robust platform through which project managers can use the Kanban Board app. With Kanban Board app, project managers can visualize the project workflow in Microsoft Dynamics 365 CRM easily. Each card on the Board represents a task or a sub-task. The project manager can move the cards between columns to represent the progress of the project and do a lot more!

## On Kanban Adoption & Approach

Kanban as an approach has been around for nearly 80 years, but has gained popularity recently.

According to the State of Agile 2022 report by Digital.ai, about 50% of respondents are currently using Kanban. In 3 years, Kanban application usage has grown from 7% in the 14th State of Agile Report to 56% in 2022.

It was reported that 90% of respondents believed Kanban was a more effective approach than other methods in agile project management.

\*Above stats are based on extensive surveys around the world, the data was collated primarily from the State of Kanban Report 2022 and the 16th Annual State of Agile Report.

A survey conducted by Kanban University received responses from all over the world. As shown on the map, the survey focused on the adoption of Kanban in various regions.



# Benefits of Using Kanban Board for Agile Project Management

Let's look at some of the factors that are responsible for the growing popularity of Kanban Board for improved visibility, increased efficiency, and enhanced communication. As a productivity app in Microsoft Dynamics 365 CRM the app offers numerous benefits for agile project management teams.

## 1. Visual management

Kanban Board provide a visual representation of the workflow, making it easy to see the status of work items at a glance. Teams can see how their work is progressing by displaying the most relevant information about each story, issue, bug, and task at a glance.

## 2. Improved collaboration

Kanban encourages collaboration between team members, as project managers can easily see what DevOps teams are working on and where they need help. Moreover, teams are able to communicate more effectively with transparency because of a unified dashboard.

## 3. Continuous improvement

Kanban Board displays task as cards that move across columns on the Board, representing their progress from start to finish. This promotes continuous improvement by encouraging teams to analyse their workflow and make changes where necessary.

## 4. Promotes productivity & clarity

Kanban Board emphasizes on visualization of workflow to optimize the process of completing tasks, ensures clarity among team members and overall enhancing developers and team's productivity.

## 5. Enhanced workflow

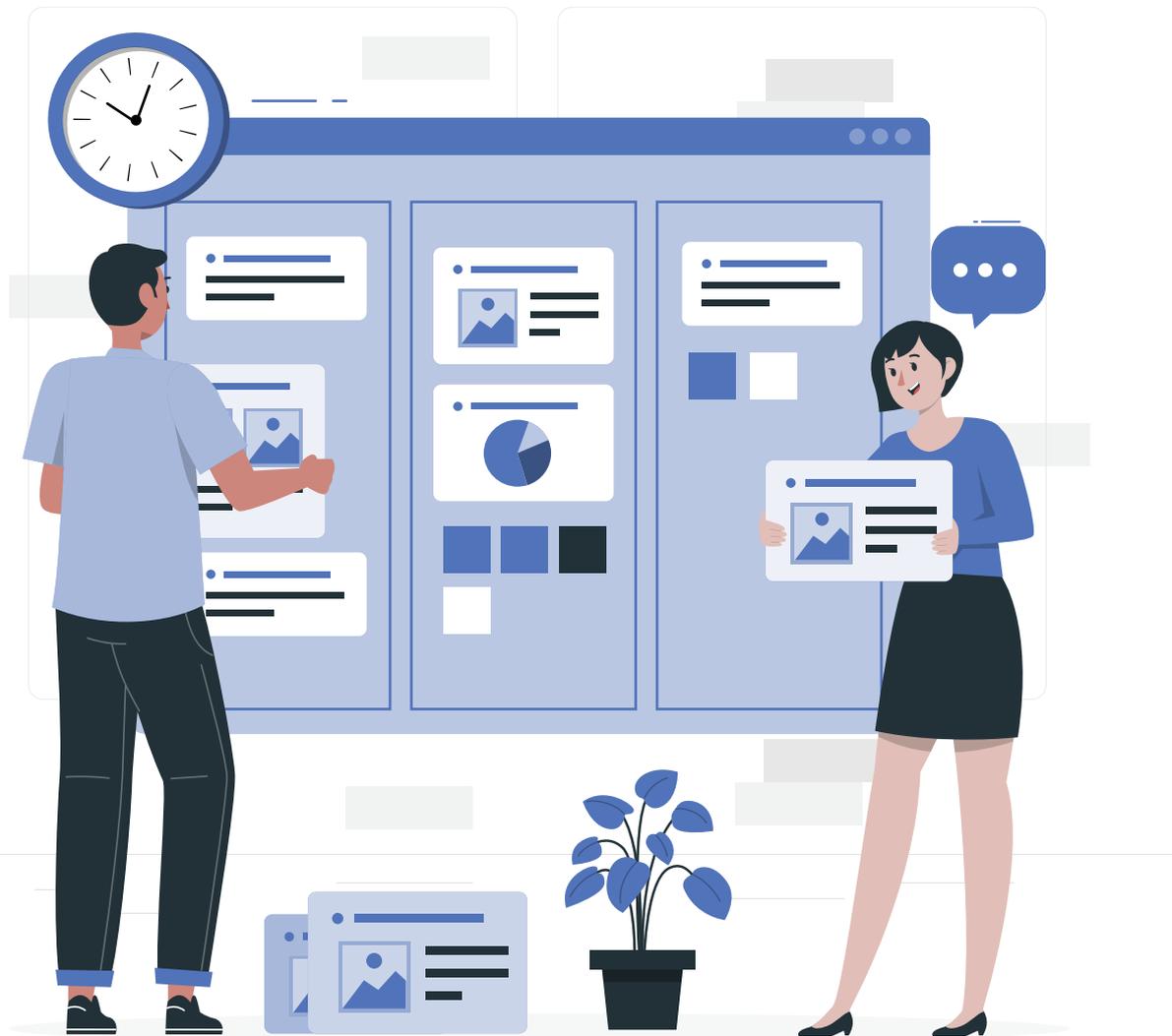
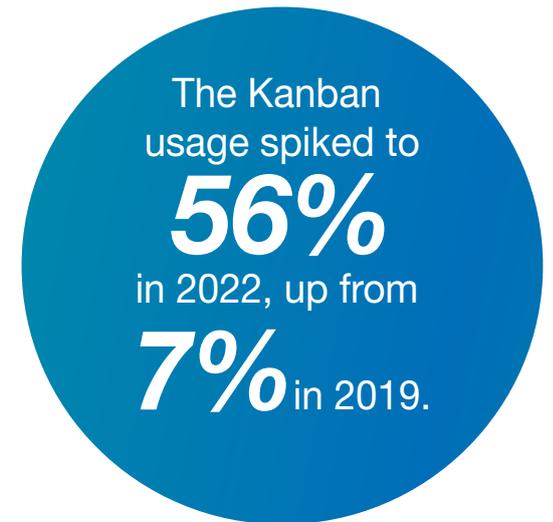
Kanban Board help to optimize the workflow in agile projects by identifying and eliminating bottlenecks. The Board provides a clear view of the agile project flow, making it easy to identify tasks that are taking longer than expected. This helps to improve the overall efficiency of the agile project.

# Using Kanban Board for Agile Project Management

Kanban Board visualizes Dynamics 365 CRM and Dataverse (Power Apps) data in a Kanban view. The ability to categorize data into lanes, facilitates quick review of records in a card-based view and identifies the status of records easily. This visual tool let's move records across lanes to update field values.

Additionally, it offers quick actions shortcuts so you can record activities against them without clicking too many times. You can configure Kanban Board as a control for any View in Dynamics 365 CRM and Dataverse.

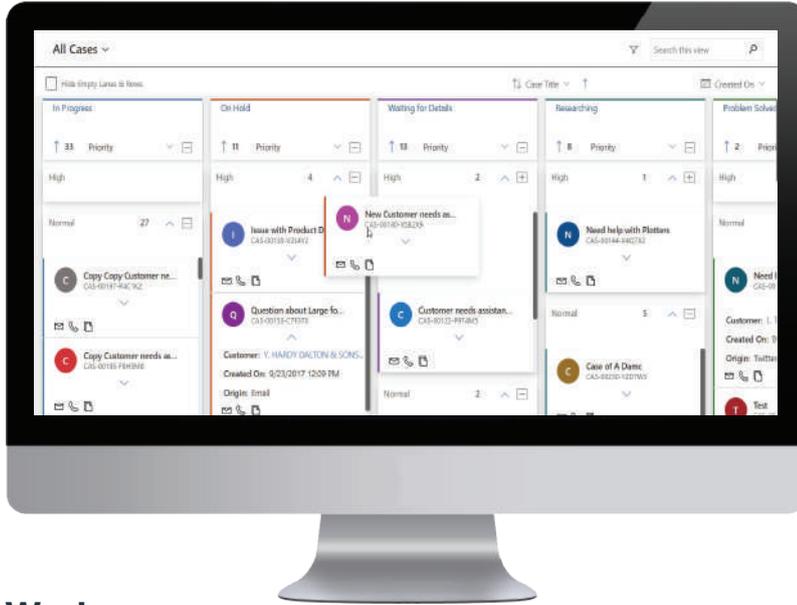
**But, how can developers and software engineers use it for agile project management (APM) framework?**



Kanban Board provides a simple and effective way to track agile project progress. The application in Microsoft Dynamics 365 CRM provides a clear view of the agile project status, making it easy to identify tasks that are behind schedule or need additional resources.

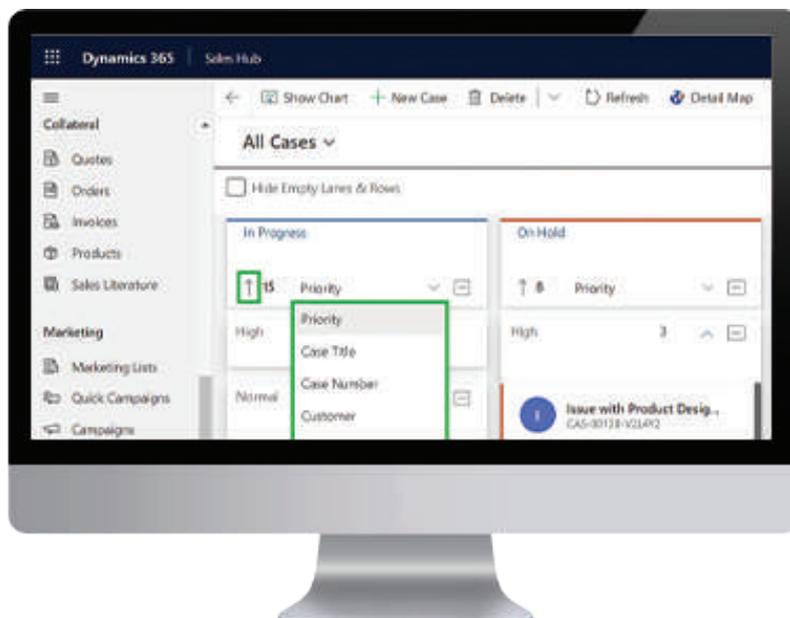
This helps to ensure that projects are completed on time and within budget. Moreover, it is designed to work seamlessly with Dynamics 365 and offer a range of features that can help teams to streamline the phases of agile project management (APM) framework.

**Let's take a look how developers and software teams can use Kanban Board in Dynamics 365 CRM and implement its features for agile project management.**



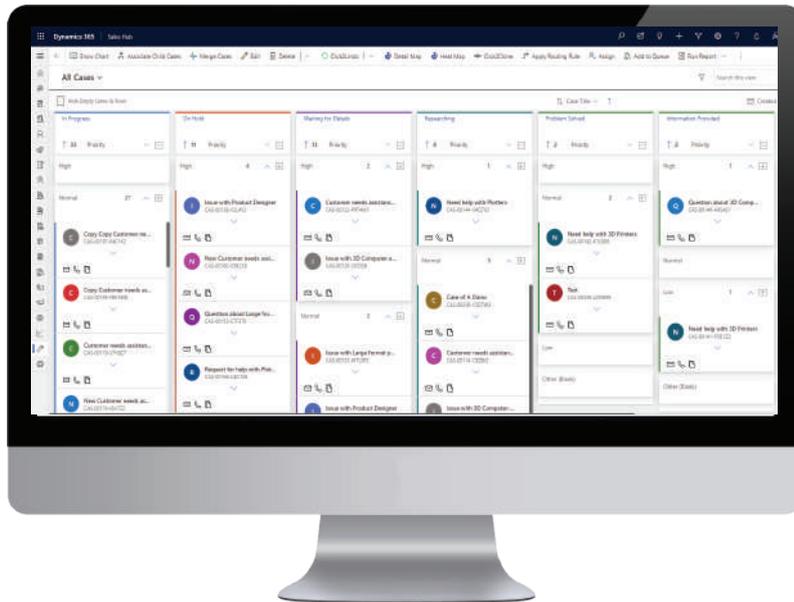
## 1. Visualize the Work

Kanban Board provide a visual representation of the work that needs to be done in an agile project. The Board is divided into columns that represent the different stages of the workflow, and tasks or items are represented by cards that move through the columns as they are completed with the Drag & Drop feature. This visual representation makes it easy to see the current status of the work and what tasks are upcoming



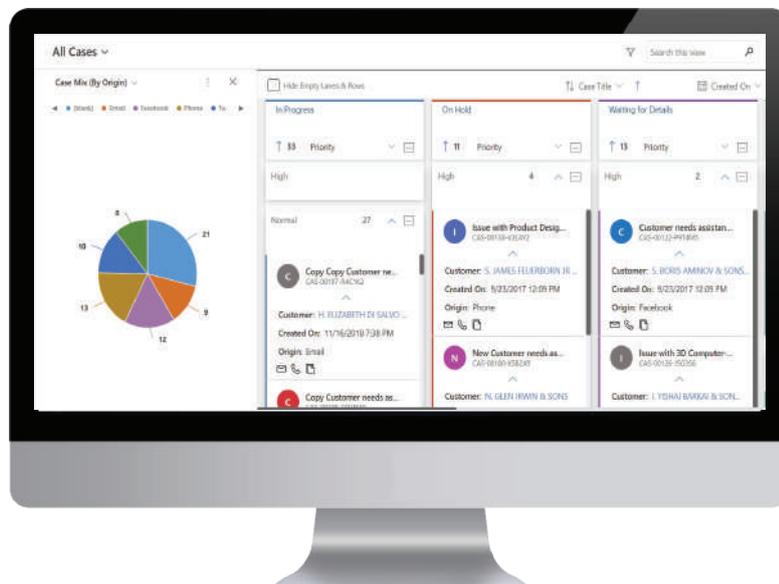
## 2. Monitor Progress & Identify Bottlenecks

Kanban Board provide a simple and effective way to monitor progress in an agile project. As tasks move through the columns on the Board, team members can see how much work has been completed and what tasks are still outstanding. This helps to ensure that the project is progressing as planned and that any issues are identified and addressed in a timely manner. It also helps identify bottlenecks in the workflow by providing a clear view of the current status of each task. If a task is taking longer than expected to move through a particular column, it may indicate that there is a bottleneck that needs to be addressed.



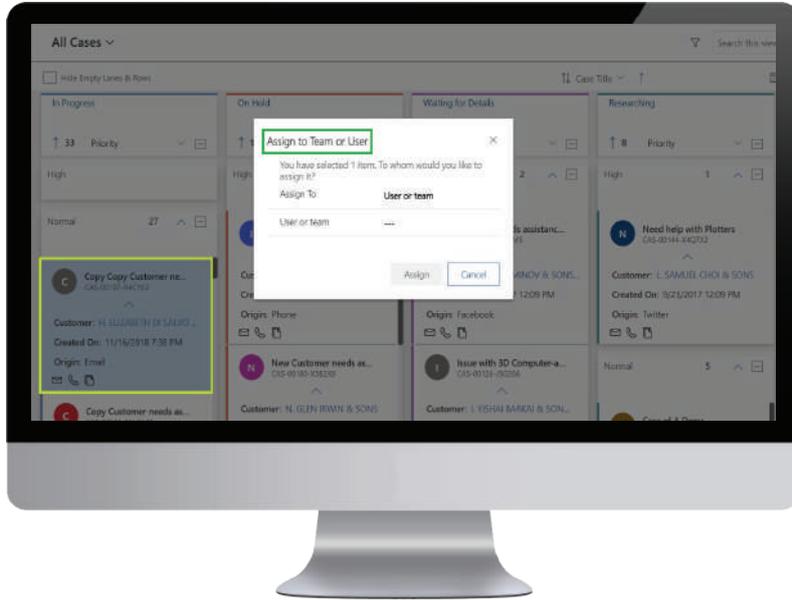
## 3. Collaborate

Kanban Board promote collaboration between team members by providing a central location where everyone can see the current status of the project. This makes it easy for team members to communicate and collaborate on tasks, which is essential for agile project management.



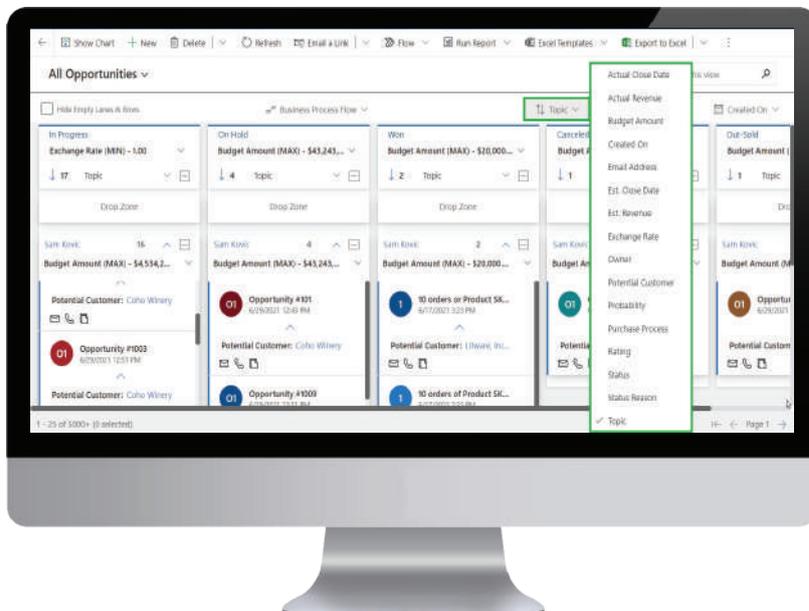
## 4. Native CRM Environment

Developers can manage their projects by working within the native CRM environment and respond to all native ribbon actions. The Kanban Board component has been added to Dataverse (Power Apps). This means you can replace the default visualization for the views in CRM with this control. It operates context-awarely, meaning you can perform any action on the ribbon bar by selecting cards as you would upon selecting a record in the traditional view.



## 5. Advanced Level of Sorting

The two features Global Sorting and Sort & Filter of Kanban Board allows agile management teams to sort their tasks, records and other OOB entities. With Global Sorting, you can sort cards (records) in ascending or descending order by the field selected. Both Kanban view and OOB Grid view allow you to sort the cards based on fields. Likewise, in Sort & Filter, records in the lanes can be sorted. The view also supports filtering by "CreatedOn" date and cards can be sorted in ascending or descending order according to the field selected.



# The Easy Way to Build Team Agility

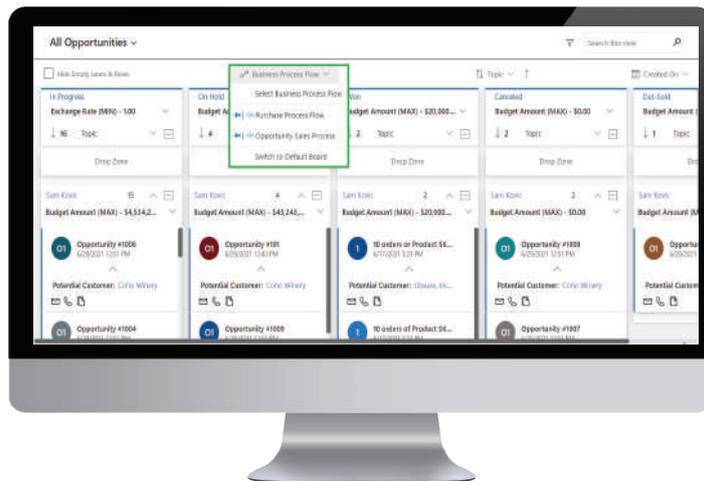


# Analyzing & Improving Your Process with Kanban Board

You can create Kanban views for records of a given entity based on the defined Process Flow. Agile projects typically go through several transitional phases as they progress through a business process flow.

You will see two pins besides each Business Process Flow.

- Global pins are dark blue and all Kanban Board users have access to the BPF.
- The white pin represents the personal pin for pinning BPF for an individual.



The transitional phases of an Agile project as it progresses through a business process flow can be visualized in a Kanban view.

## Some common Kanban Board columns that represent these phases are:

- 1. Backlog:** This column contains all the work items that are yet to be started, and it represents the planning phase.
- 2. Analysis:** This column represents the analysis phase where the team analyzes the requirements and creates user stories.
- 3. Design:** This column represents the design phase where the team creates the initial design of the product or feature.
- 4. Development:** This column represents the development phase where the team writes code, creates features, and builds the product.
- 5. Testing:** This column represents the testing phase where the team verifies that the product works as intended and meets the acceptance criteria.
- 6. Deployment:** This column represents the deployment phase where the team deploys the product to the production environment.
- 7. Done:** This column represents the maintenance phase where the team continues to maintain and support the product, making updates and fixes as needed.

The specific columns and their names may vary depending on the project and the team's preferences. The Kanban view allows the team to track the progress of the project and

# Agile Project Managers Measuring Success with Kanban Board

Agile project managers can measure success with a Kanban Board by using metrics that align with the project's goals and objectives.

**Here are some common metrics that agile project managers can use to measure success:**

## 1. Work in progress

Project managers can evaluate this metric to measure the number of work items that are currently in progress at any given time. The team can focus on completing work items before starting new ones, which can increase efficiency and throughput.

## 2. Cycle time

This metric measures the time it takes for a work item to move from the "Backlog" column to the "Done" column. By reducing cycle time, the team can deliver work items faster and respond to changing priorities more quickly.

## 3. Lead time

This metric measures the time it takes for a work item to move from the "Backlog" column to the "Done" column, including any time spent waiting in other columns. By reducing lead time, the team can improve their ability to deliver work items on time and meet project deadlines.

## 4. Cumulative flow

This metric tracks the number of work items in each column of the Kanban Board over time. By analyzing the cumulative flow, the team can identify bottlenecks and areas for improvement in their workflow.

By using these metrics to continuously monitor and improve the team's performance, agile project managers can measure success with the Kanban Board app in Microsoft Dynamics 365 CRM and ensure that the project is meeting its goals and objectives.



# Increase Visibility, Align Strategies, & Execute Processes.



# Addressing Common Challenges in Kanban Board Implementation

Implementing a Kanban Board for agile project management in Microsoft Dynamics 365 CRM can present some challenges.

**Here Are Some Common Challenges That Organizations May Face:**

## 1. Lack of buy-in

One of the biggest challenges in implementing a Kanban Board is getting everyone on Board. Some team members may be resistant to change or may not see the value in using a Kanban Board. One way to deal with this is to buy an easily adaptable Kanban Board!

## 2. Poor visualization

A Kanban Board is only effective if it is designed well and provides clear visual representation of the workflow. If the Board is cluttered or confusing, it can be difficult for team members to understand what they need to do.

## 3. Inadequate training

If team members are not properly trained on how to use the Kanban Board and its associated tools, they may not be able to use it effectively. This can result in confusion, errors, and delays in project completion.

## 4. Lack of process standardization

A Kanban Board relies on standardized processes and workflows. If these processes are not clearly defined or are constantly changing, it can be difficult to maintain the integrity of the Kanban Board and accurately track progress.

## 5. Incompatible tools

If the tools used for Kanban Board implementation are not compatible with Microsoft Dynamics CRM 365, it can be difficult to integrate the Board with other project management tools and systems.

### **The Solution:**

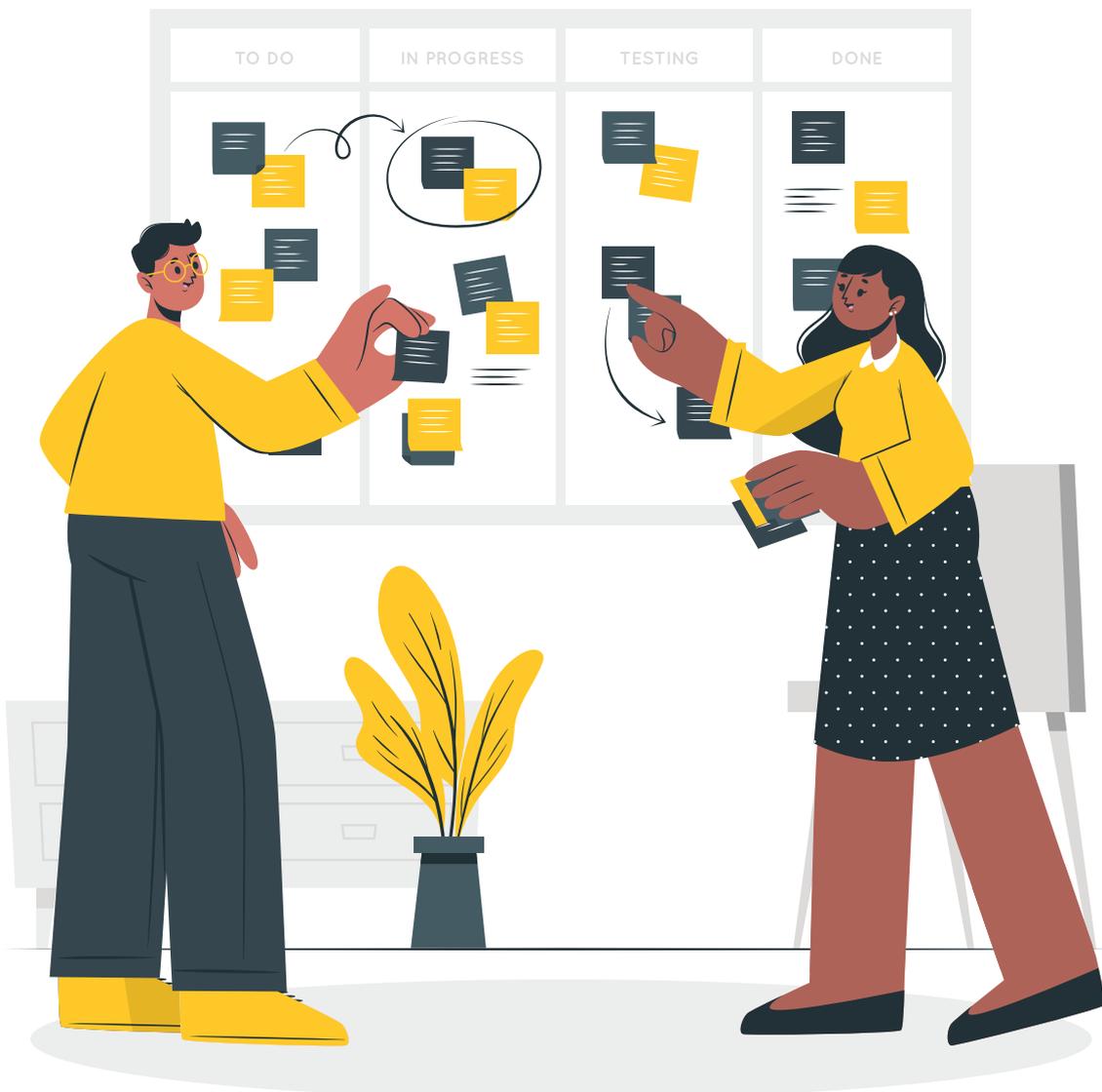
It is important to choose a Kanban Board that is compatible with Microsoft Dynamics CRM 365 and your process to ensure effective integration with other project management systems.

There are multiple Kanban Boards available in the market and it is also natively integrated as a view in the Microsoft Dynamics 365 CRM. However, most of them come with inadequate functionalities and can limit scope.

The Kanban Board offered by Inogic can help you visualize your Microsoft Dynamics 365 CRM data in a Kanban View to improve your productivity, efficiency, and visibility.

1. You can review and analyze records in multiple lanes and rows as compact movable cards that are categorized and systematically arranged.
2. Using drag & drop functionality, you can update the field values of records and perform quick actions to record activities like Email, Task, or Phone Calls.
3. You can enjoy a unified experience is provided by web, mobile and tablet controls.
4. Sort records at various level based on selected fields in ascending and descending order.
5. Being a context-aware Kanban Board uses all native ribbon actions, including quick search, that are available for conventional views within Microsoft Dynamics 365 CRM.

Kanban Board is available for Dynamics 365 CRM v9.1 and Dataverse (PowerApps) and also supports Dynamics 365 Online.



# Takeaway

This E-Book demonstrates how Kanban Board has revolutionized agile project management, while using Microsoft Dynamics 365. This is why, Microsoft AppSource lists Kanban Board as a preferred solution! With the visual representation of workflow, Kanban Board enhances productivity and efficiency.

The productivity app has become increasingly popular among Microsoft Dynamics 365 users as it offers several advanced features and functionalities, those are better than the Kanban view that is natively available in within the CRM.

Kanban Board's simple interface makes it easy to track progress and visualize tasks. One of the strengths of the solution is its flexibility, as it can be customized to meet the specific needs of each project.

Further, the book proves that embracing Kanban and its principles can lead to smoother project execution, faster cycle times, and continuous improvement.

To get a demo and experience the tool yourself [start your 15-day FREE trial today!](#) or click here to [Get Quote](#) as per your requirements!

## Get in Touch

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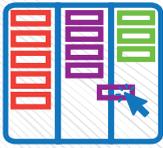
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