

Kanban Board How-To Guide

Step 1 – Choose your Kanban board platform

* Find the best platform for your team
	+ Microsoft Planner
	+ Trello
	+ Monday.com
* Considerations
	+ Cost
		- You may already have a license to use MS Planner
		- Trello and Monday.com have free versions
	+ Inter-Organization Access
	+ Notifications

Step 2 – Set up your Kanban board for the project



* Common buckets
	+ Artifacts



* + New Issues



* + In Progress



* + Discuss / Meeting Agenda



* + Icebox



Step 3 – Add team members

* Add your team members to the Kanban board
* Assign tasks to team members as appropriate

Step 4 – Track each task

* Open each task and add detail
* Upload documentation to each task as necessary
* Update the notes section in each task throughout the lifecycle
* Utilize the drag and drop feature to move the task when its status changes