



Kanban with Al Certified (KACTM)

Webinar and Certification (3-hours)



- 1. Webinar Format and Prerequisites (5 mins)
- 2. Kanban Overview and Why use Kanban? (30 mins)
- 3. Practice a Kanban Workflow with Vabro.ai (2 hours)
- 4. Get your KACTM Certification! (5 mins)
- 5. Next Steps (5 mins)



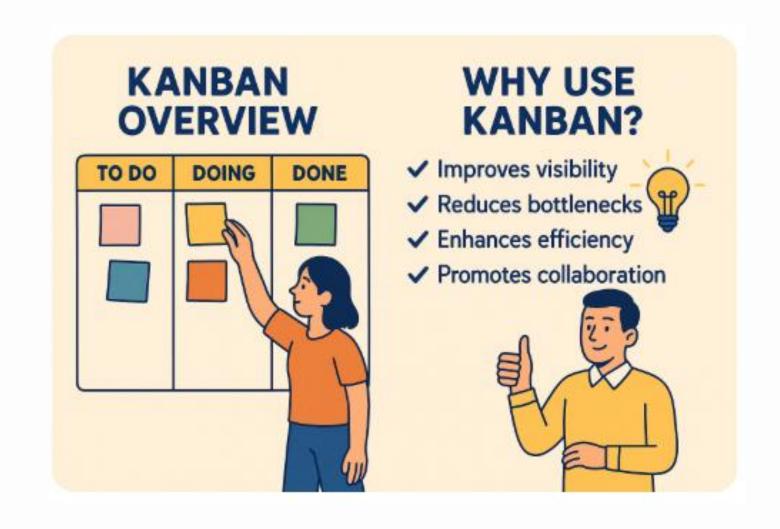


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Discount Vouchers and other benefits as you refer friends and grow the Agile community!



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1. Webinar Format





- There are no prerequisites for this webinar.
- Anyone interested in understanding and applying Kanban and Agile concepts using AI can join this webinar
- Although not mandatory, it is recommended that students complete
 the Kanban Essentials Certified (KEC™) course or any other
 Kanban course before attending this webinar.
- Students completing the Vabro.ai demo as part of this webinar will get the Kanban with AI Certified (KACTM) certification no exam required!





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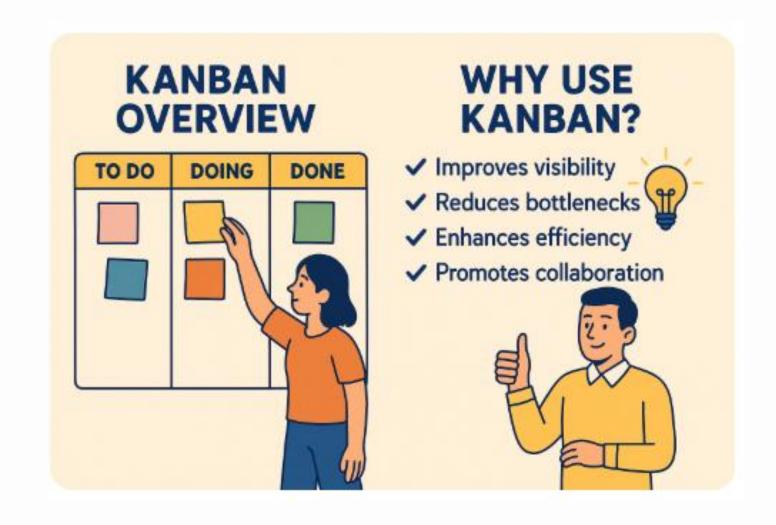


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2. What is Kanban?



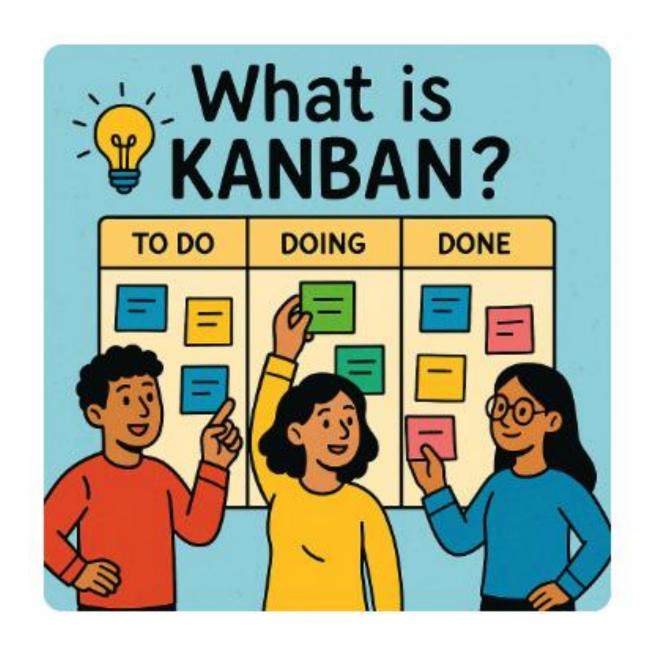
- Visual workflow management method used to organize, track, and optimize the flow of tasks using boards and cards.
- Helps teams improve efficiency and reduce
 delays by limiting work-in-progress and making the
 current status of every task visible in real time.



2. What is Kanban?



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- Important Roles in Kanban
- Overview of Kanban Framework
- Benefits of Kanban



Kanbanstudy

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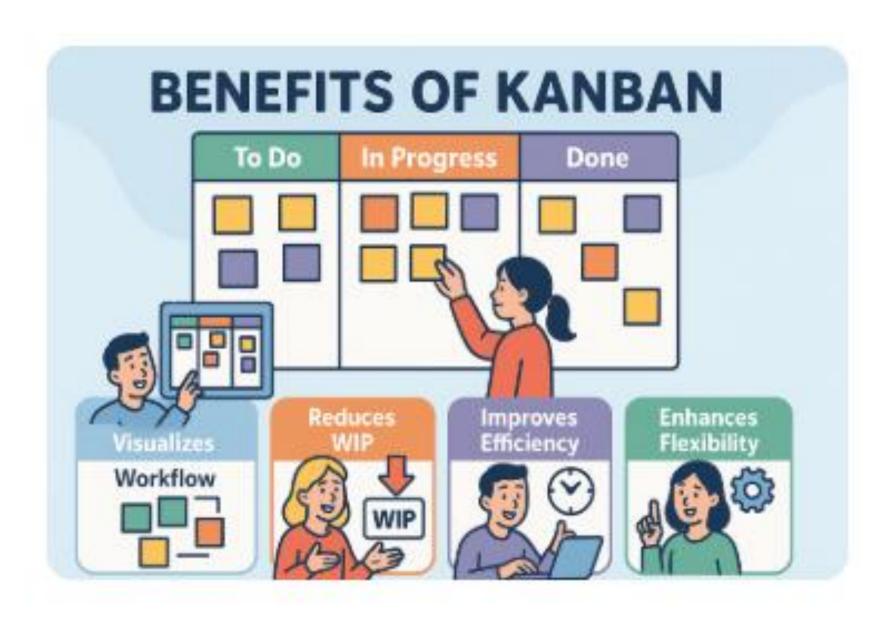


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2.b Kanban Roles



- Kanban Product Owner
- Kanban Manager
- Kanban Team Members
- Stakeholders





Product Owner

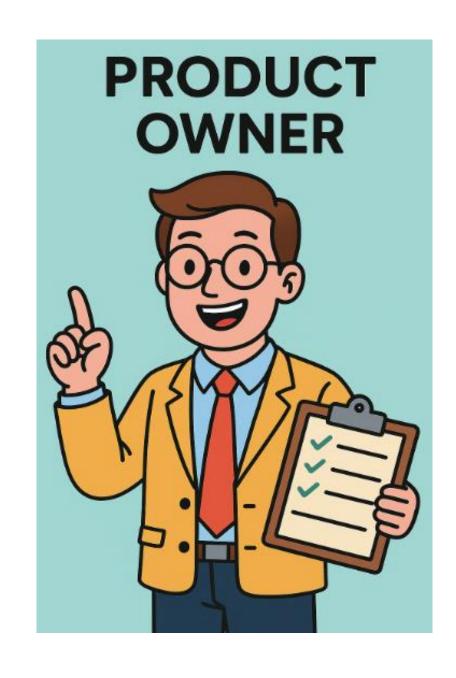
- Defines Work
- Sets Priorities
- Focus on what needs to be delivered and why it is important!





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Kanban Manager

(also referred to as a Flow Manager, Service Delivery Manager, Collaborator, or Team Admin)

- Manages Kanban Board, removes obstacles
- Monitors metrics and drives continuous improvement within the team's Kanban processes
- Facilitates or coaches for effective execution





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Kanban Team Members

- Create Task Group and Tasks on the Kanban Board
- Adhere to Work in Progress(WIP) Limits to maintain steady flow
- Collaborate Effectively and execute Tasks to deliver expected results





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Stakeholders

(individuals, groups, and entities that interact with the Kanban Workflow)

- People who provide inputs to a Kanban workflow and may trigger tasks in the Kanban Workflow (Example – for a HR Leave Management workflow, stakeholders could be employees submitting leave requests which will result in tasks being created in the Leave Management Workflow)
- Clients, Business Leaders or External parties who provide feedback and review outcomes





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2.b Important Roles in Kanban



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2.b Kanban Roles (review)



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2.b Important Roles in Kanban



Additional Reference and Further study:

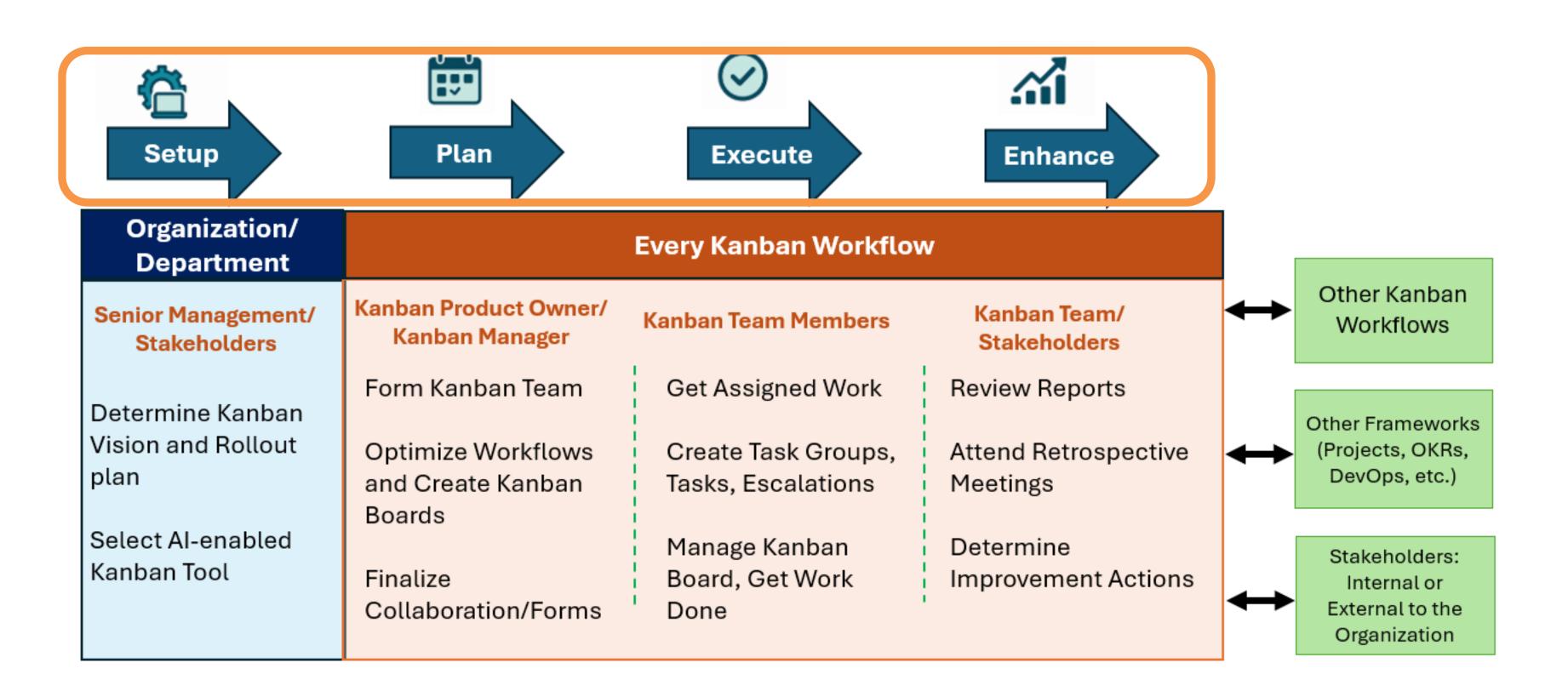
- KBOK[™] Guide Chapter 3: « Kanban Roles and Artifacts" (Pages 43–47)
- Advanced Kanbanstudy Certifications such as KPC[™], KMC[™], KPOC[™],
 KSDOC[™], etc.



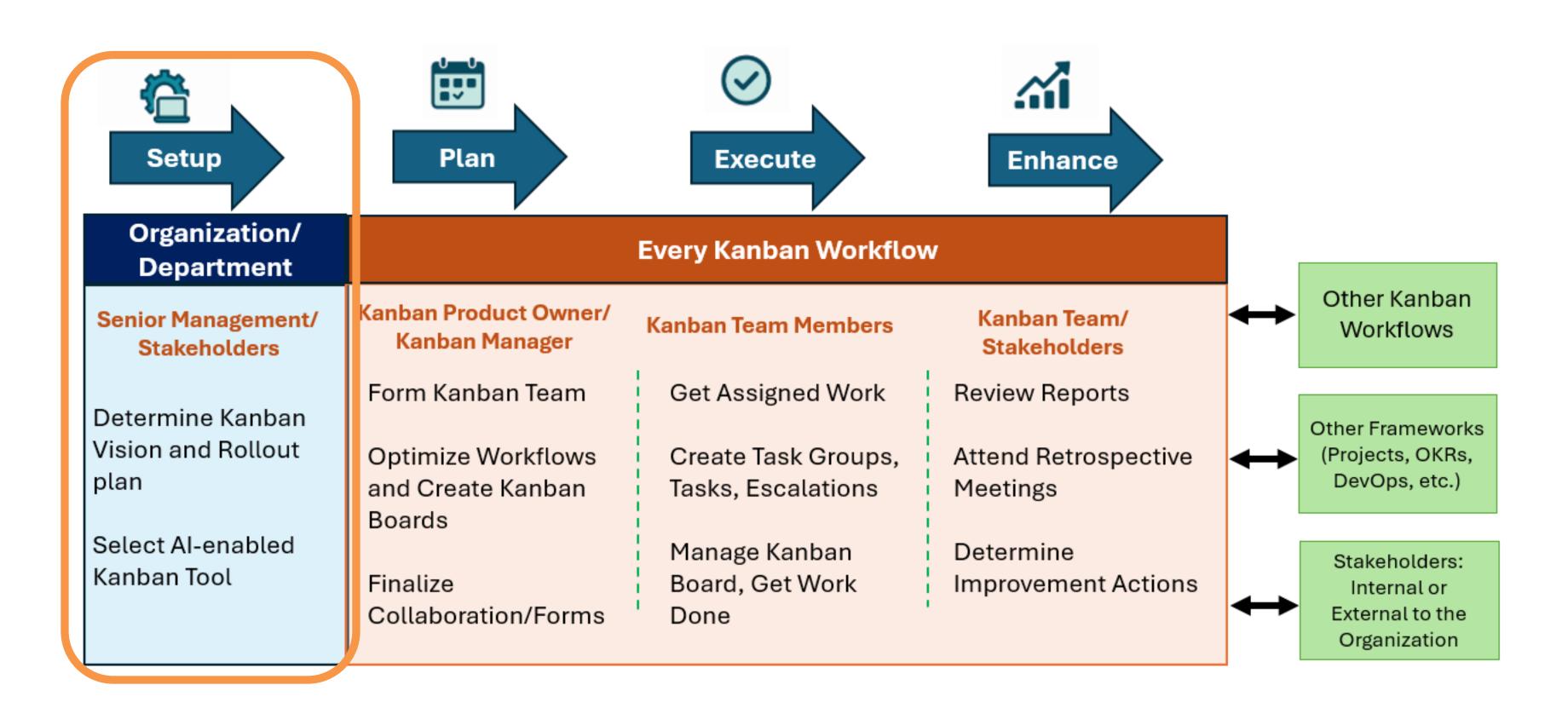




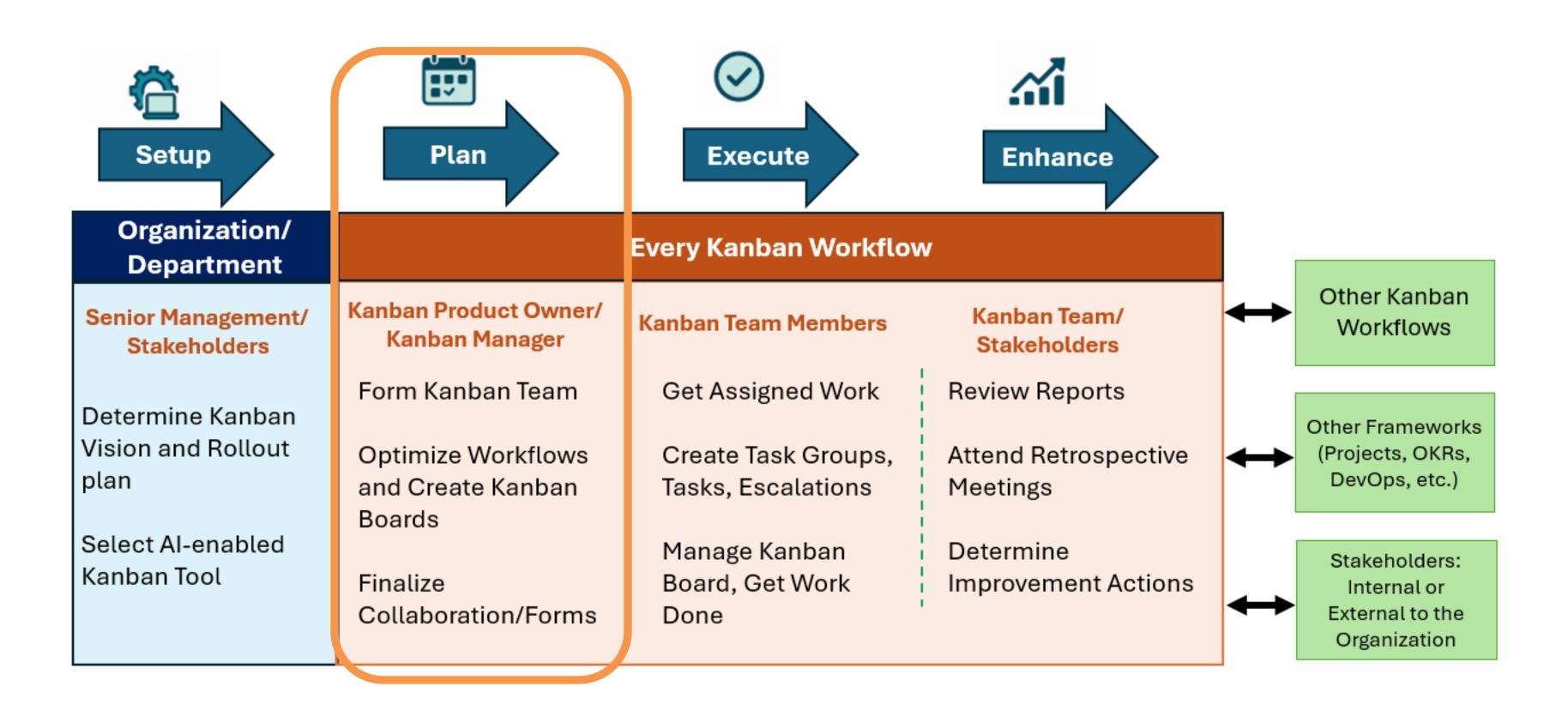




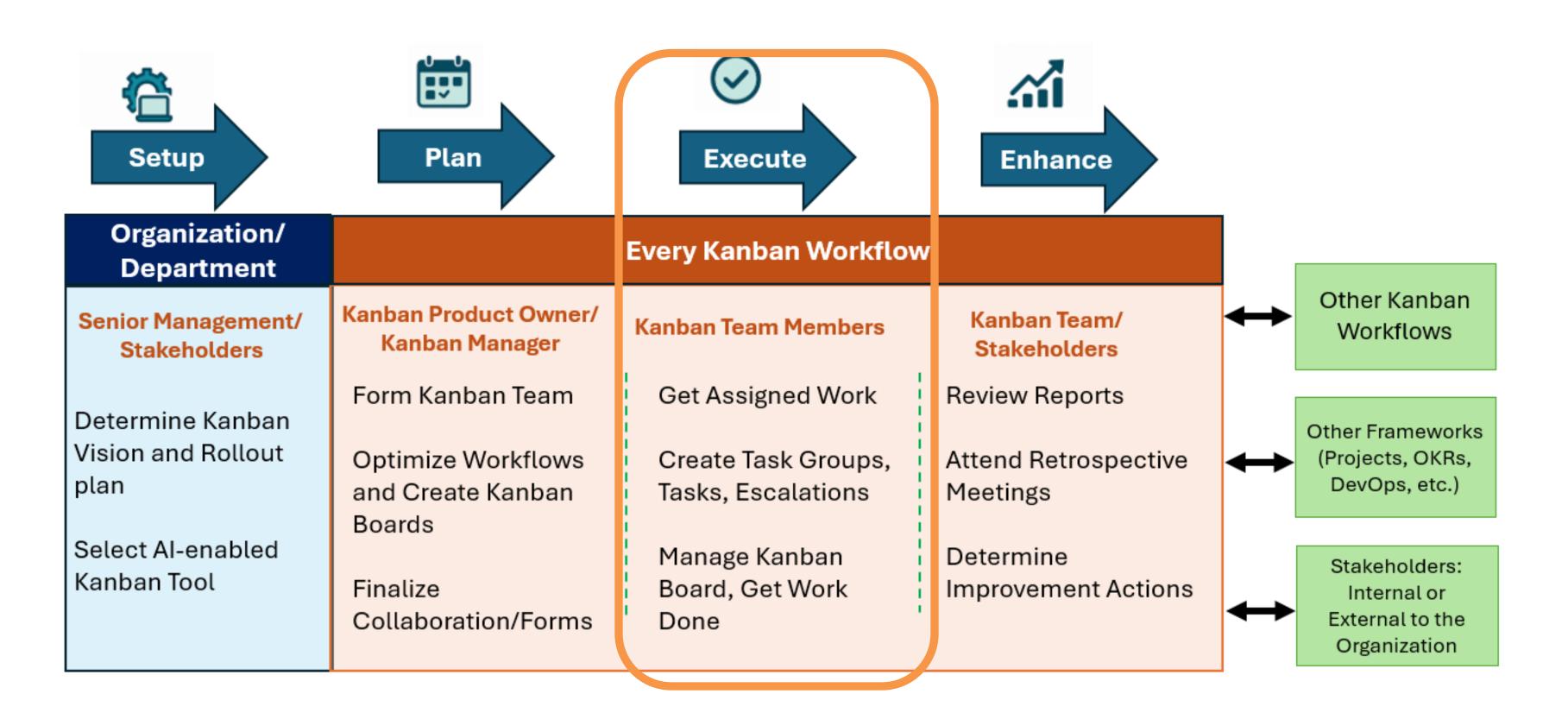




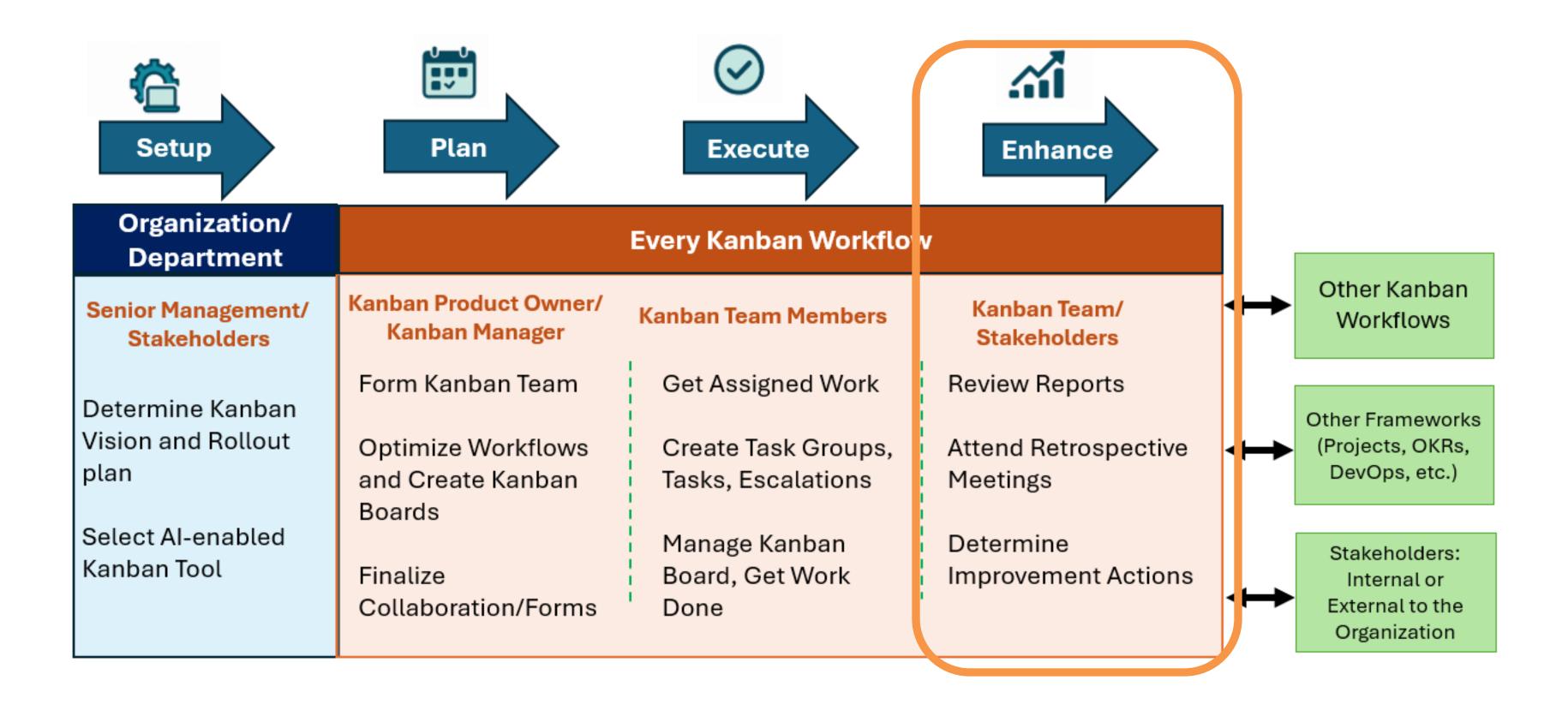




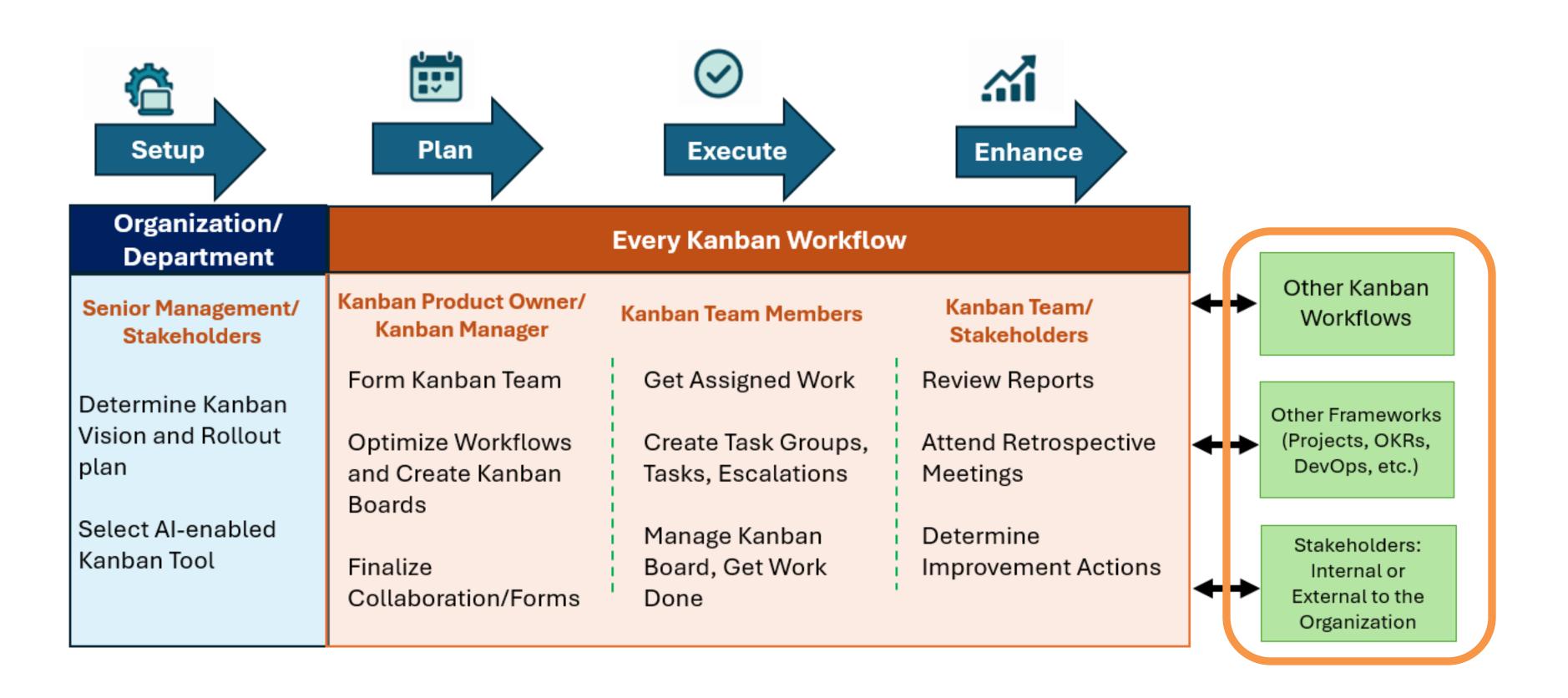
























Senior Management/ Stakeholders

Department

Determine Kanban Vision and Rollout plan

Select Al-enabled Kanban Tool

Senior Management/Stakeholders:

• Provide direction, funding, and decision-making support for the Kanban rollout

Determine Kanban Vision and Rollout Plan:

Sponsors, Users and Customers with an interest in project outcomes

Select an Al-enabled Kanban Tool: (optional)

- Automate tasks, provide analytics, and make workflow management more efficient
- High quality Al-enabled Kanban Tool (e.g. Vabro.ai) can create entire workflows, Kanban Boards, Collaboration Forms, OKRs and more using just Al prompts and suggest best-practices for any workflow. Also provide high quality Al-powered analytics and reporting.





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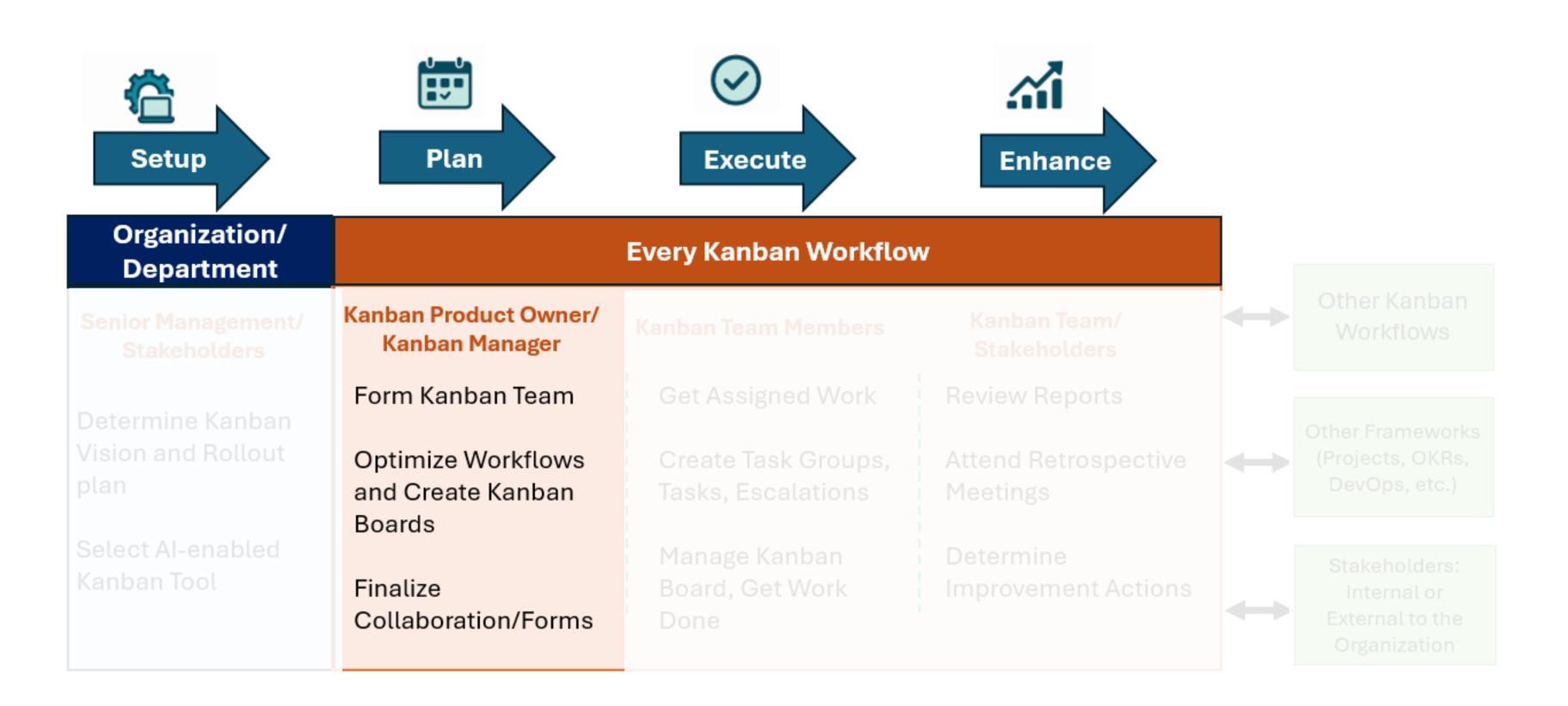
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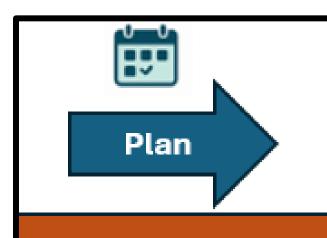












Every Kanban Workflow

Kanban Product Owner/ Kanban Manager

Form Kanban Team

Optimize Workflows and Create Kanban Boards

Finalize Collaboration/Forms

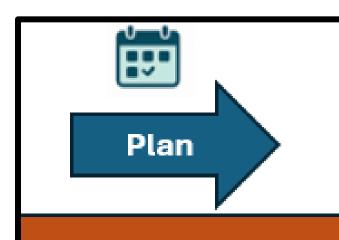
Kanban Product Owner and Kanban Manager:

- Kanban Product Owner defines the work, and sets priorities,...
- Kanban Manager focuses on workflow efficiency, removes obstacles.
- Same person can play both roles.

Form Kanban Team:

Clear roles and responsibilities to manage work using Kanban





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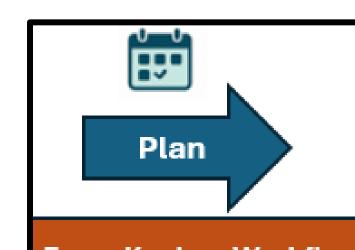
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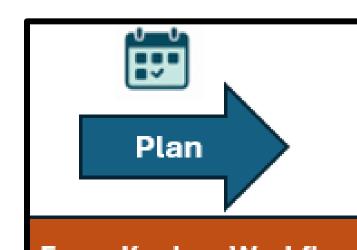
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- Workflows refer to the sequence of steps to complete tasks
- Kanban Backlog is a list of tasks, features, or issues for future execution
- Kanban Boards visually display work stages. Kanban Column Types:
 - To Do backlog of tasks waiting to be started
 - In Progress Tasks currently being worked on by the team.
 - Escalated Tasks that need approvals or special attention (issues, dependencies, blockers etc)
 - Done completed Tasks
- Optimizing ensures faster, smoother, and more efficient task movement.
 - Limit Work in Progress (WIP) setting a maximum number of tasks allowed in each column of the Kanban Board
 - Identify and Remove Bottlenecks Monitor stages where tasks pile up or progress slows down
 - Use Metrics and Continuous Feedback Track key metrics like Cycle Time (time taken for a task to finish) and Throughput (number of tasks completed)





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You will create entire Al-powered Kanban Workflows, and create and manage Kanban Boards as part of the free Kanban with Al Certified (KAC™) certification — where you will use Vabro.ai to practice all the theoretical concepts learned.





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Finalize Collaboration/Forms

Finalize Collaboration and Forms:

• Set up collaboration tools and communication channels, so that the entire team works seamlessly together. Includes messages, notifications, chats, etc.

Collaboration may be with stakeholders of different types:



Same Workspace – For example, one Kanban team collaboratively working on tasks within the same workflow.



Within the Organization but outside the Workspace – For example, employees submitting leave requests to an HR Leave Management Workflow or submitting reimbursement requests to a Finance Expense Management Workflow.







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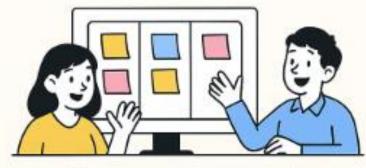
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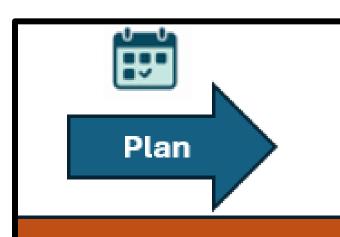


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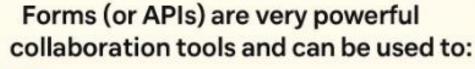
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Set up Kanban tasks in a prediefined format.



Collect inputs from customers and stakeholders from inside or outside the organization



Fully configure workflows, as forms support most data types including text, numbers, attachments, dates, dropdowns, and more



Configure and automate responses to external stakeholders through customizable headers, footers, automated messages, etc.



Automate stakeholder notifications as tasks move through different stages in Kanban workflow



Leverage Al-powered messaging and templates to simplify and standardize communication



Gather feedback and rating from external stakeholders about performance workflow (e.g. customer support feedback)







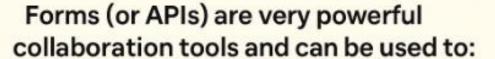
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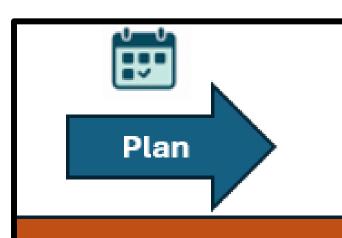
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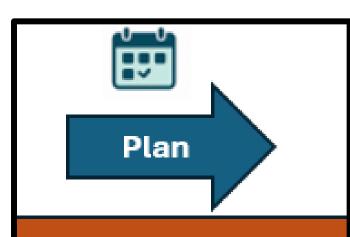


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Collect inputs from customers and stakeholders from inside or outside the organization



Fully configure workflows, as forms support most data types including text, numbers, attachments, dates, dropdowns, and more



Configure and automate responses to external stakeholders through customizable headers, footers, automated messages, etc.



Automate stakeholder notifications as tasks move through different stages in Kanban workflow



Leverage Al-powered messaging and templates to simplify and standardize communication

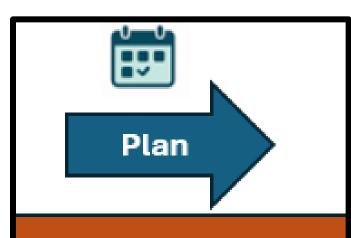


Gather feedback and rating from external stakeholders about performance workflow (e.g. customer support feedback)



Generate comprehensive reports to track multiple workflows and data points (e.g. total reimbursement requests per employee in a month)





Every Kanban Workflow

Kanban Product Owner/ Kanban Manager

Form Kanban Team

Optimize Workflows and Create Kanban Boards

Finalize Collaboration/Forms

Forms (or APIs) are very powerful collaboration tools and can be used to:



Set up Kanban tasks in a prediefined format.



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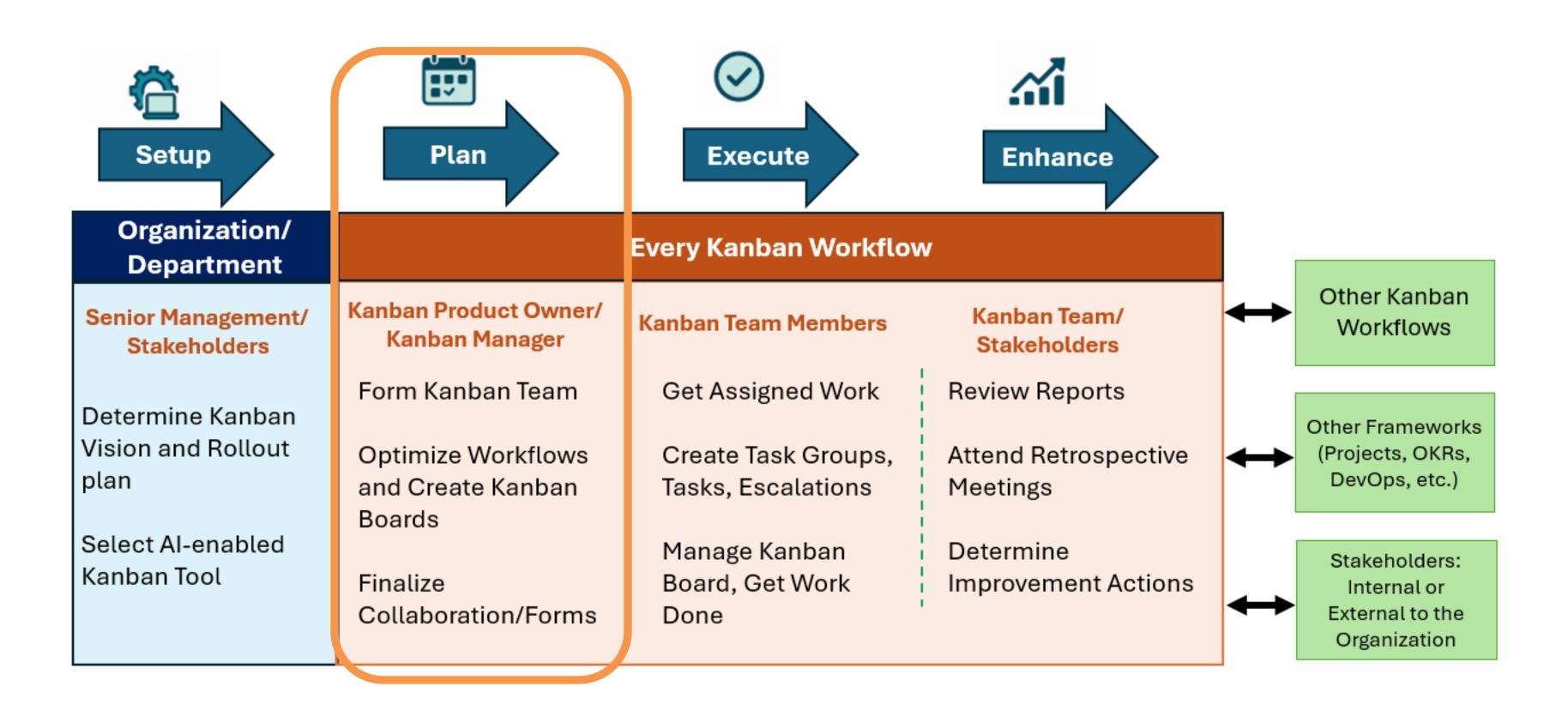
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Kanban Team Members

Get Assigned Work

Create Task Groups, Tasks, Escalations

Manage Kanban Board, Get Work Done

Get Assigned Work:

 Receive tasks from the Kanban backlog, Planning phase, Form submissions from other stakeholders or teams, Escalations etc.

Create Task Groups/Tasks/Escalations:

- Task Groups are collections of related tasks
- Tasks are individual work items
- Escalations refer to tasks that need to be assigned to another workflow, or issues or blockers that need higher-level attention to resolve quickly

Manage Kanban Board, Get Work Done:

- Move Tasks in the Kanban Board as they complete each task in the workflow
- Visualize, organize, prioritize, and complete work efficiently





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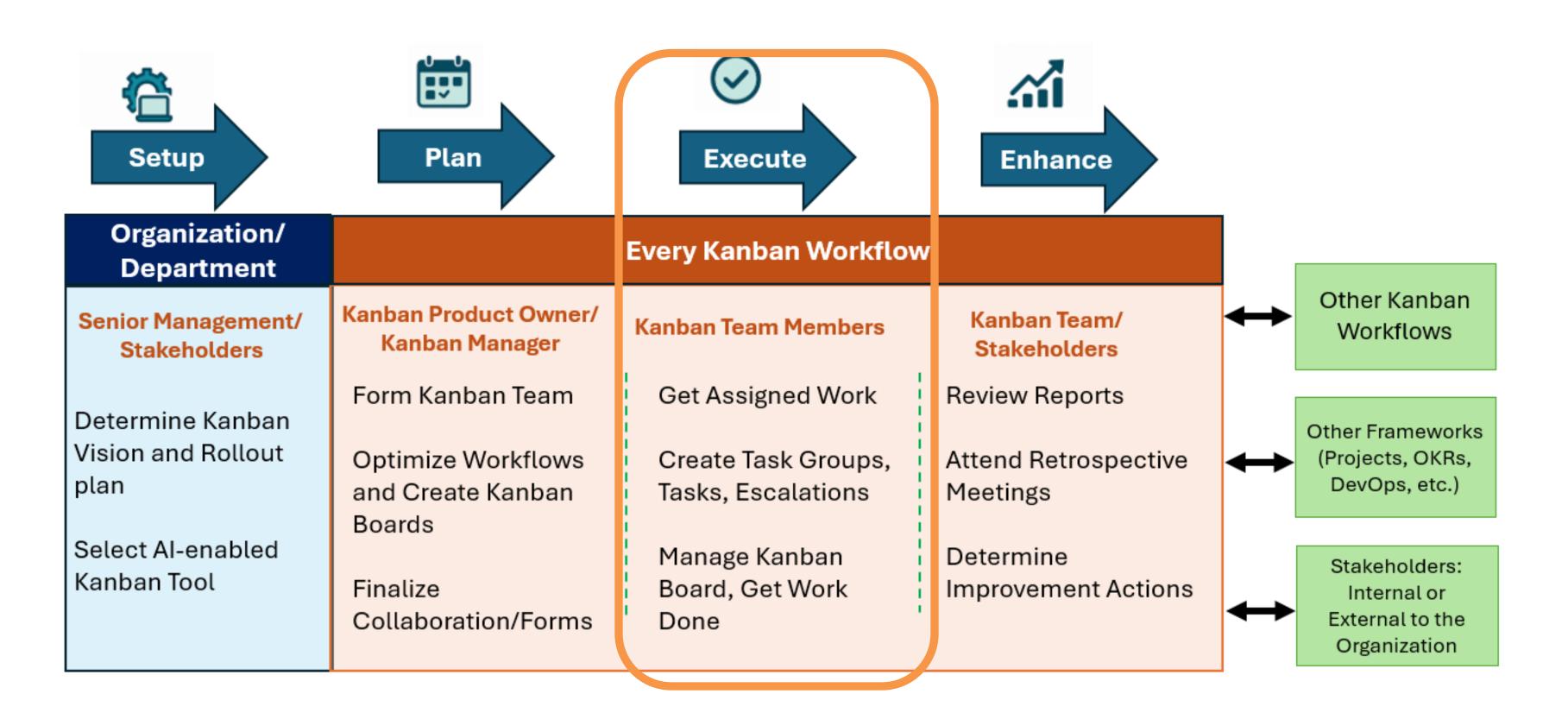
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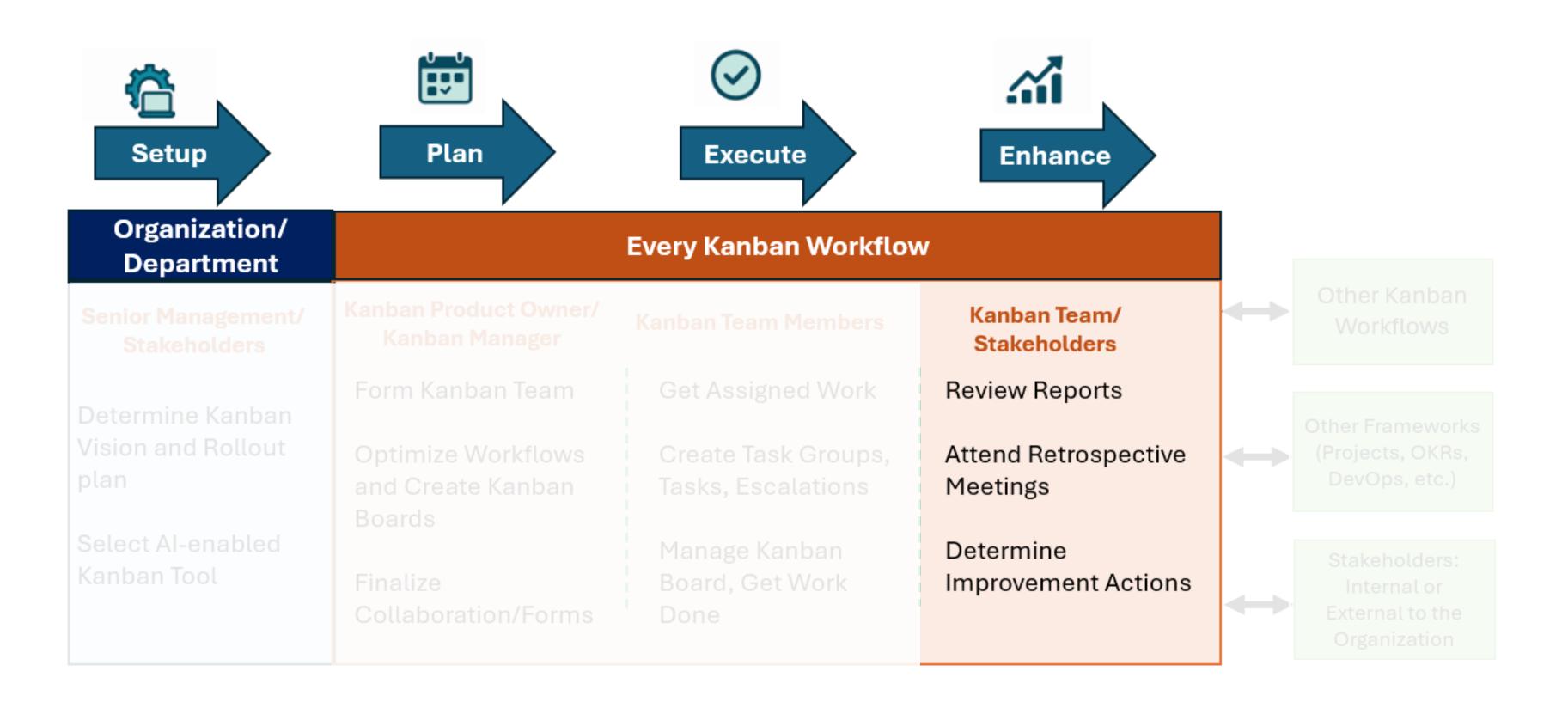
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Every Kanban Workflow

Kanban Team/

Stakeholders

Review Reports

Attend Retrospective Meetings

Determine Improvement Actions

Kanban Team / Stakeholders:

Entire Kanban Team and all stakeholders involved.

Review Reports:

- Go through performance and progress reports to check how well the workflow performed
- Track Relevant Metrics to ensure faster delivery without sacrificing quality

Attend Retrospective Meetings:

Team discusses what went well and what needs improvement

Determine Improvement Actions:

• Improve efficiency, reduce bottlenecks, and deliver better results in the next cycle





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Other Kanban Workflows

Other Frameworks (Projects, OKRs, DevOps, etc.)

> Stakeholders: Internal or External to the Organization

Other Kanban Workflows:

- Share tasks, dependencies, and updates
- Ensure smooth coordination and consistency

Other Frameworks (Projects, OKRs, DevOps, etc.):

Align tasks and timelines to improve efficiency.

Stakeholders: Internal or External to the Organization:

 Get work, collect feedback, share progress updates, and ensure that expectations are met



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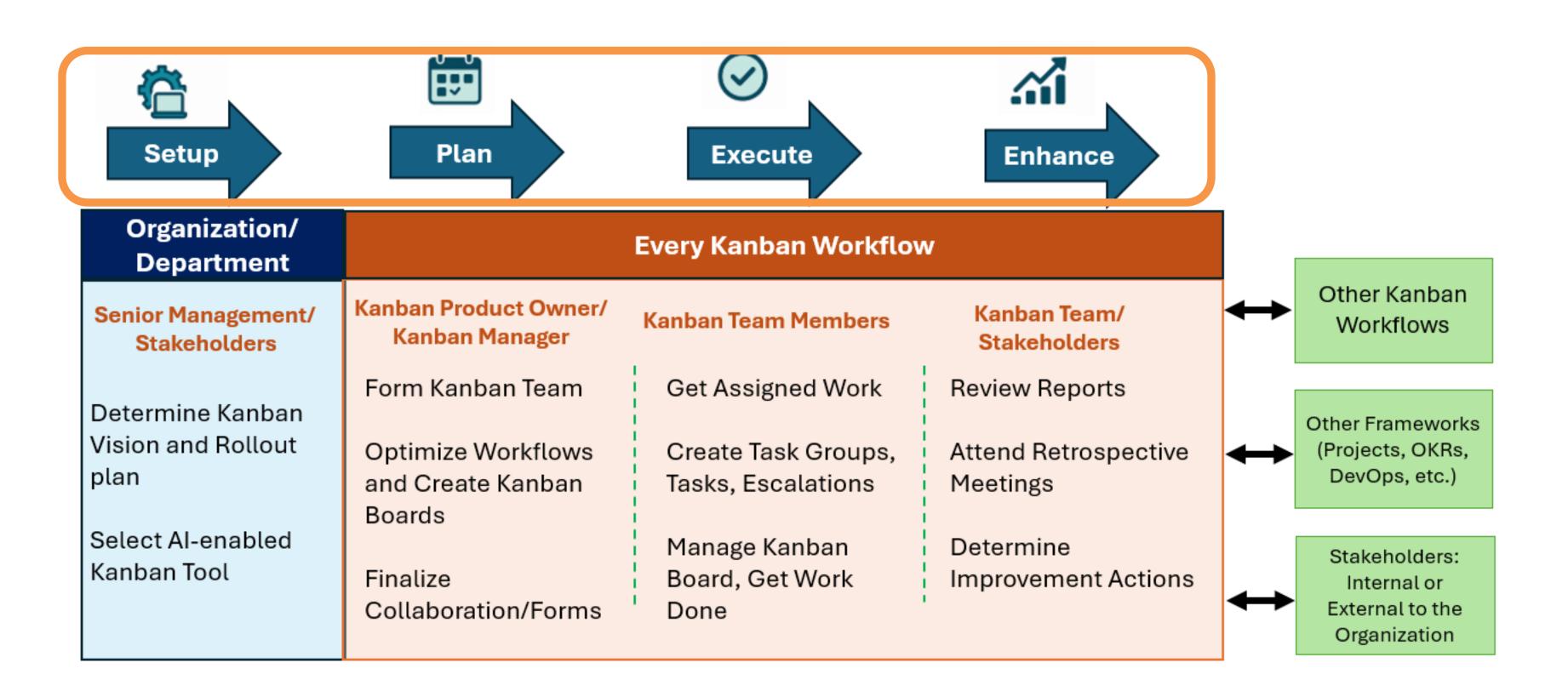
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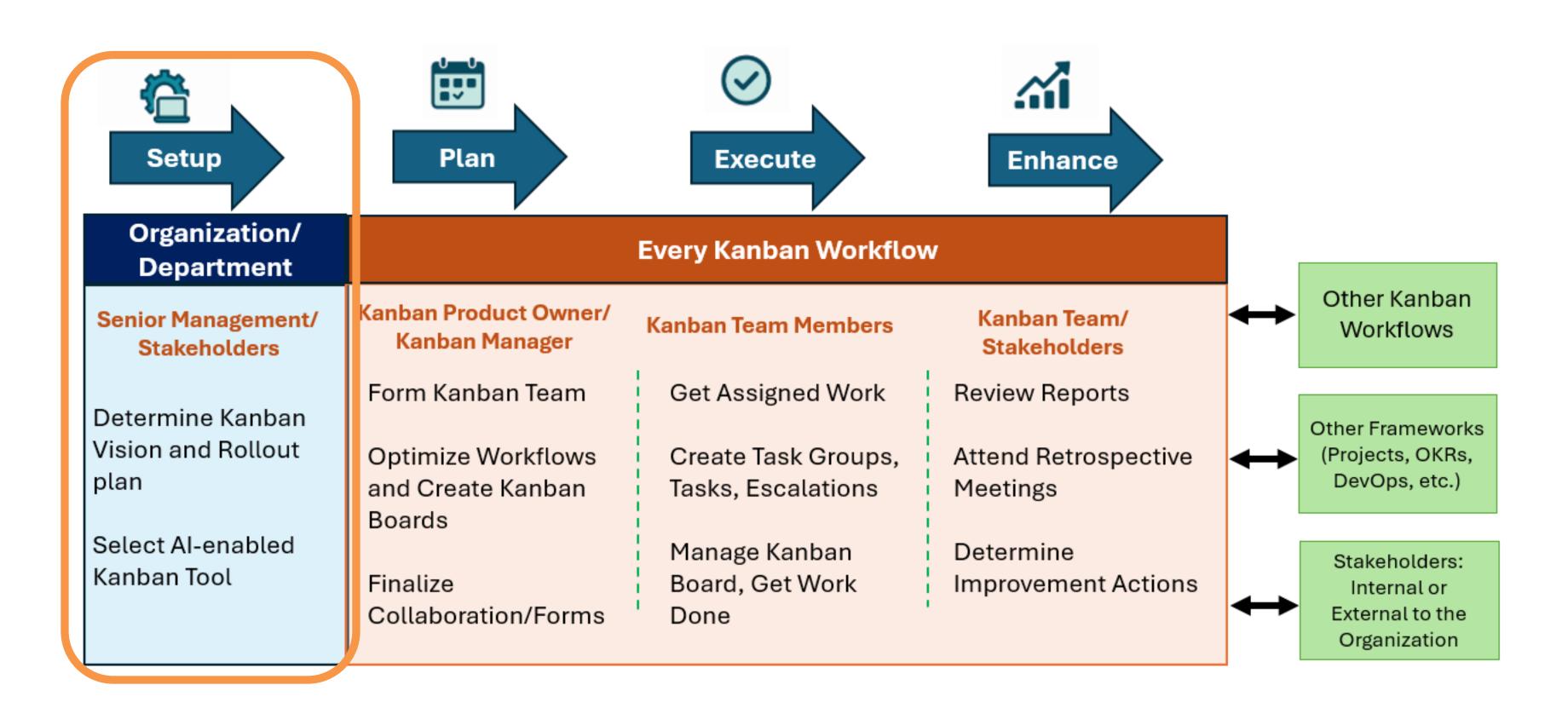




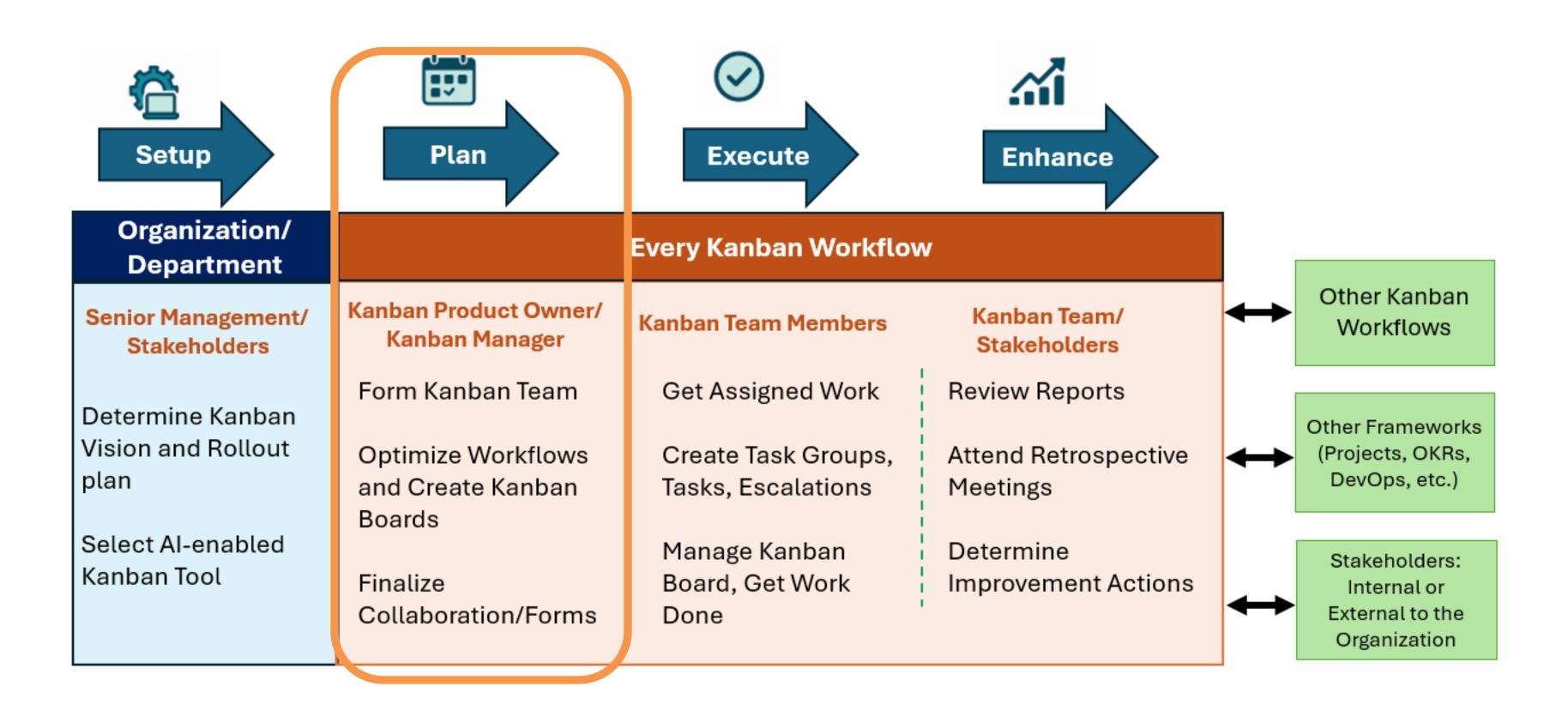




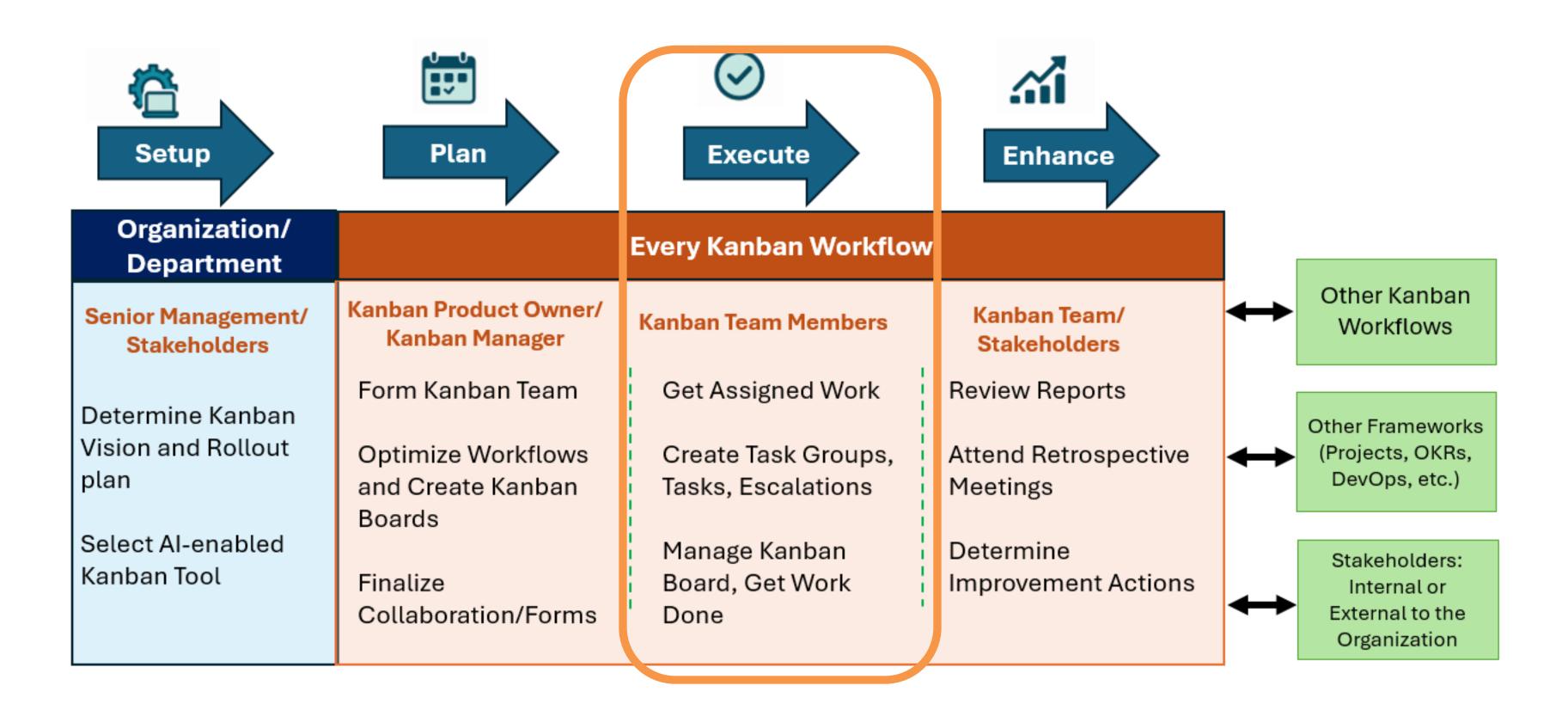








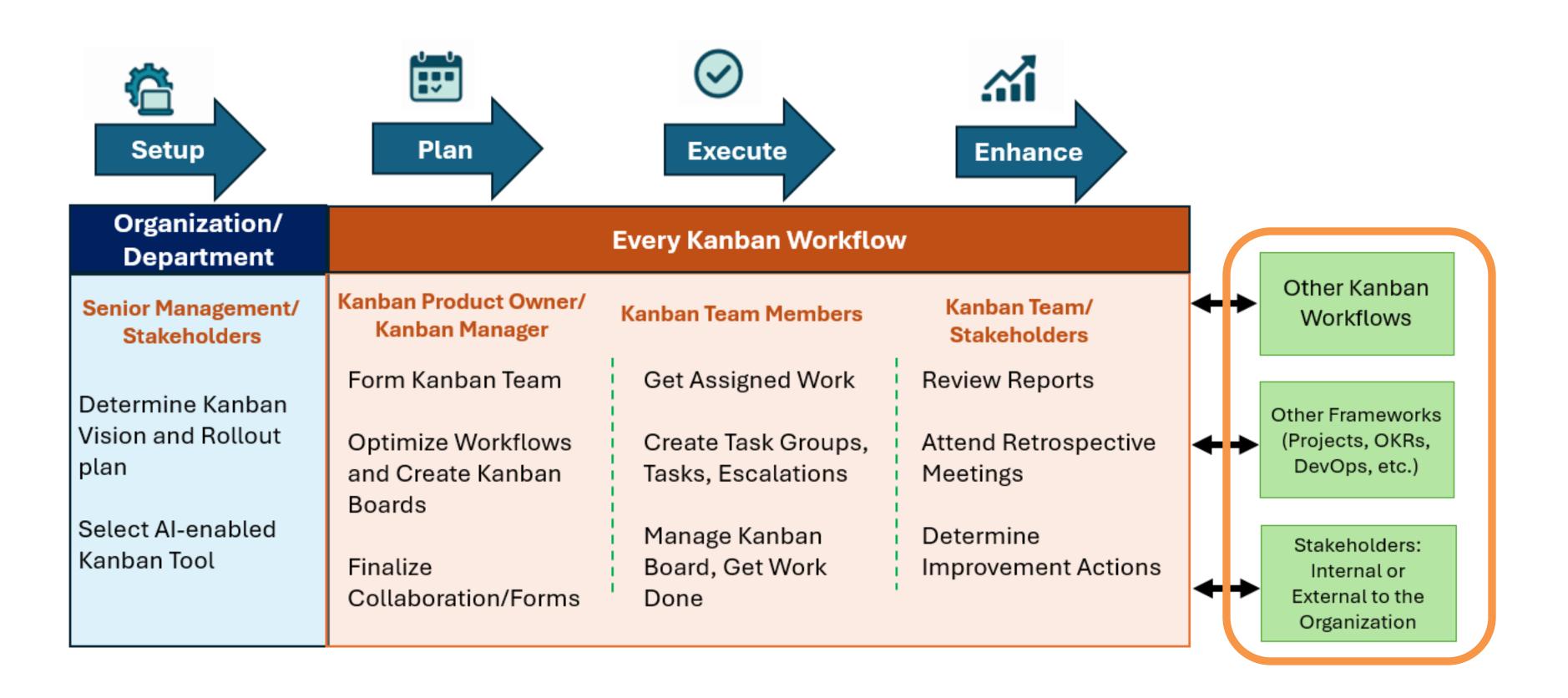
















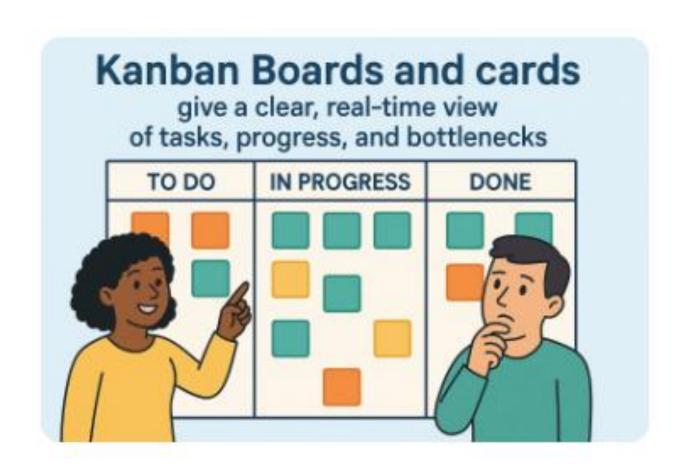






Visual Workflow Management

 Boards and cards to give a clear, real-time view of tasks, progress, and bottlenecks





Improved Efficiency

- Limit Work in Progress(WIP)
- Ensure focus on finishing existing tasks before starting new ones





Faster Delivery

- Continuous flow helps deliver value quickly
- Reduces Delays
- Improves time-to-market





Flexibility & Adaptability

- Accommodate changing priorities easily
- No disruption to entire workflow





Enhanced Collaboration

- Teams and stakeholders aligned
- Visual boards, updates, and clear responsibilities.





Data-Driven Improvements

 Metrics and Reports help identify areas for process improvement





Scalability Across Teams

- Works for individuals, small teams, or entire organizations
- integrates with other frameworks seamlessly.





- Visual Workflow Management
- Improved Efficiency
- Faster Delivery
- Flexibility & Adaptability
- Enhanced Collaboration
- Data-Driven Improvements
- Scalability Across Teams



2.b Kanban Roles, Overview and Why use Kanban?



- Important Roles in Kanban
- Overview of Kanban Framework
- Benefits of Kanban



10-minute Break



Webinar Format and Prerequisites (5 mins)





- Kanban Overview and Why use Kanban? (30 mins)
- 3. Practice a Kanban Workflow with Vabro.ai (2 hours)

10-minute Break



Optional – Please review concepts related to "Kanban Overview and Why use Kanban? " in the Webinar Reference Document

If you have any questions, please ask Vabro Genie Al, or message VMEdu customer support team

- 1. Steps to prepare for the Vabro.ai demo (10 minutes)
- 2. Setting up your Vabro.ai account (5 minutes)
- 3. Using Al Template to Set Up an HR Workflow (5 minutes)
- 4. Understanding the Kanban Board (20 minutes)

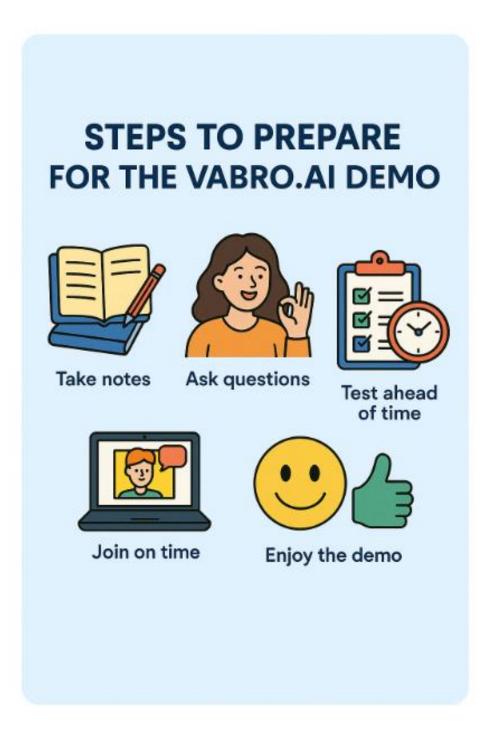


- 5. Exploring Task Groups and Tasks (20 minutes)
- 6. Collaborating using Al-powered Forms (25 minutes)
- 7. Kanban in Action A Complete Process Walkthrough (19 minutes)
- 8. 150+ Features Bigger and Better (1 minute)
- 9. Create entire process with your AI prompt (10 minutes)



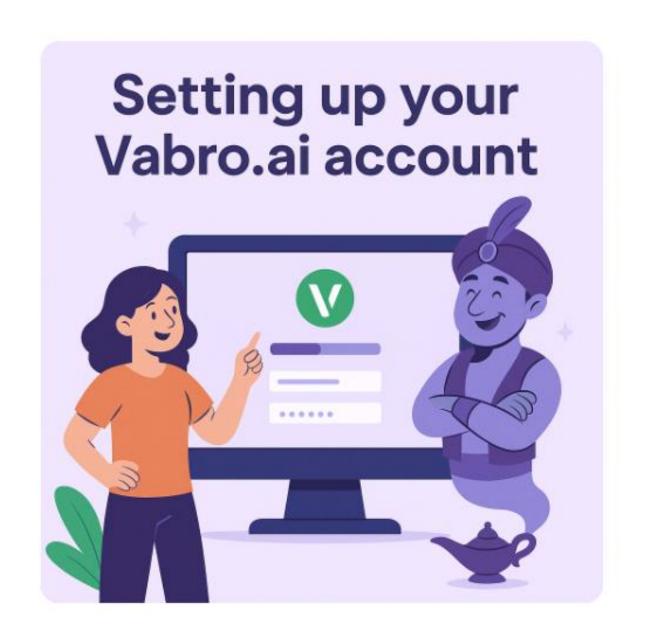
1. Steps to prepare for the Vabro.ai demo (10 mins)

Walk you through the essential steps required before you begin the Vabro.ai demo



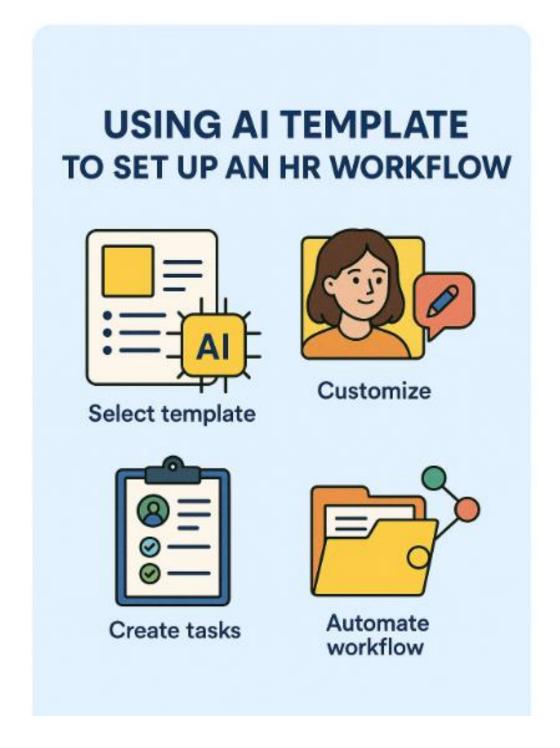
2. Setting up your Vabro.ai account (5 minutes)

We will then walk you through setting up your Vabro.ai account



3. Using Al Template to Set Up an HR Workflow (5 minutes)

Demonstrate how to instantly create a complete HR workflow using Vabro.ai's powerful AI template feature



4. Understanding the Kanban Board (20 minutes)

Explore the structure and layout of the Kanban board



5. Exploring Task Groups and Tasks (20 minutes)

Learn how task groups are organized and how individual tasks are created and managed inside them



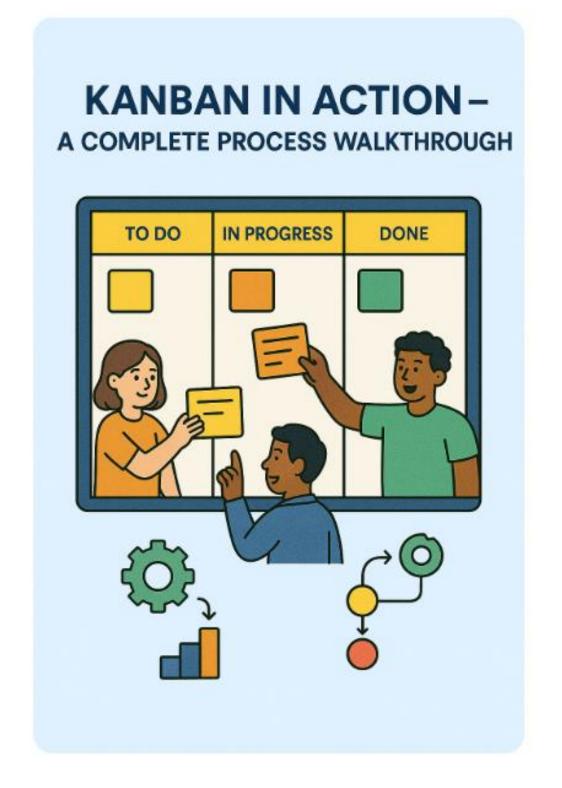
6. Collaborating using Al-powered Forms (25 minutes)

Show how Vabro.ai forms enable seamless collaboration between team members and external stakeholders using Al automation.



7. Kanban in Action – A Process Walkthrough (19 minutes)

Full walkthrough of how Kanban works in a real-life scenario, from submitting forms, setting up tasks to completing workflows..



8. 150+ Features – Bigger and Better (1 minute)

Quick highlight showcasing how Vabro.ai offers more than 150 powerful features that make it bigger and better.



9. Create entire process with your Al prompt (10 minutes)

See how you can generate an entire workflow or process using just a single Al prompt in Vabro.ai.



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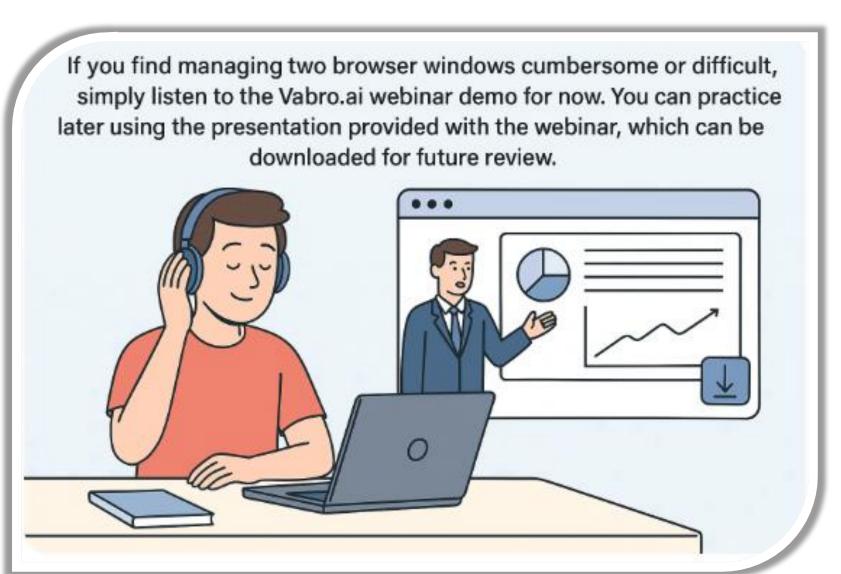




- You will need to open a new browser window, or use another browser, to run the video demo.
- One browser window will continue to be used to play the webinar please do not close this window.
- After listening to the instructions in the webinar video browser screen, follow the instructions in the webinar using the second browser window to practice your Vabro.ai demo.







3.1 What if you have technical issues and cannot complete the Vabro.ai demo?



- 1. Some participants may not be able to complete the Vabro.ai demo.
- 2. In that case, please download the webinar presentation slides and follow the steps mentioned in the slides. This will be sufficient for you to complete the entire Kanban with AI demo and get KAC™ certified.



- For this demo, we will use a Personal Workspace which
 is created for you. (completely free and takes less
 than a minute to setup!)
 - Allows only one user
 - Has no expiry date
 - Perfect for experimenting and trying out all the features in Vabro.ai
- Limitations:.
 - Since this allows one user so, you will have to
 create an organization account to get multiple users.



- For this demo, we will use a Personal Workspace which is created for you.
 - Allows only one user
 - private space set up exclusively for your trial and learning
 - only you can access it, ensuring full privacy and control
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- For this demo, we will use a Personal Workspace which is created for you.
 - Allows only one user
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 - Keep using it as long as you want without worrying about time limits.
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 - Explore every tool and capability risk-free before moving to a bigger setup
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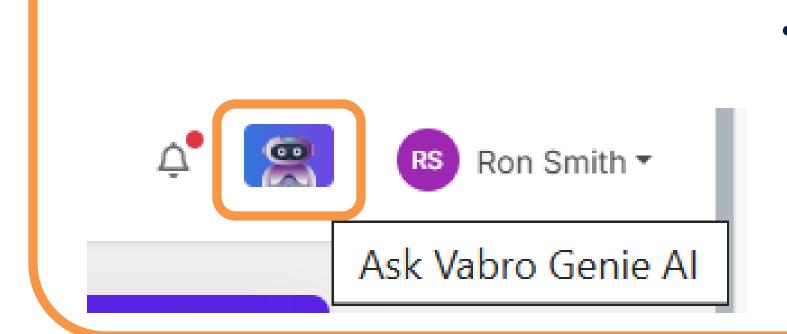


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 - Needed when you want your whole team to start using Vabro and collaborate with each other
 - Easy to create Organization in couple of mins!



3.1 Accessing help when using Vabro.ai





Ask Vabro Genie Al

Once you get started with Vabro.ai, you will notice a small Vabro Genie Al icon at the top right of your screen. You can click on this icon anytime to ask questions related to Scrum, Agile, Vabro.ai, or any other concept you are struggling with.

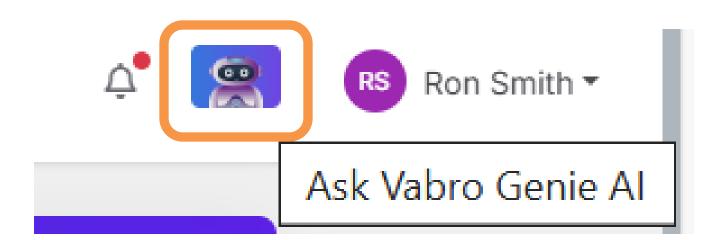
"i" Button

Whenever specific terms or concepts are introduced, you
will see an "i" button next to them. Click on this button to
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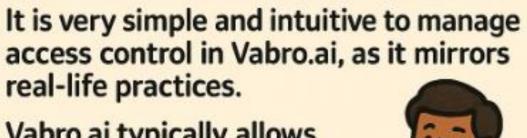


It is very simple and intuitive to manage access control in Vabro.ai, as it mirrors real-life practices.

Vabro.ai typically allows only the creator of an artifact (such as a Workspace, Workflow, or Kanban Board) to edit or delete it.

Other roles can view these artifacts but cannot modify or remove them.





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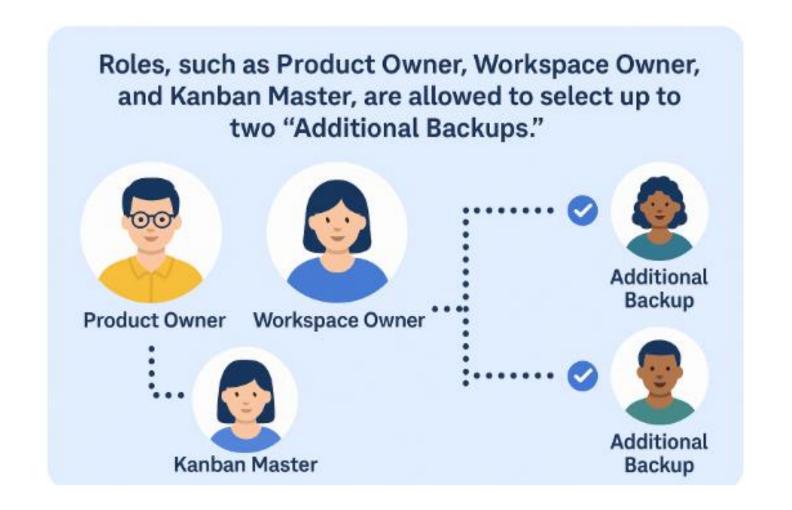
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3.1 Backups for important roles



- Roles, such as Product Owner, Workspace Owner, and Kanban Manager, are allowed to select up to two "Additional Backups."
- This ensures that if a person is unavailable, the work still gets done.



3.1 "Show All" vs. "Show Mine"



 Throughout the tool, you will see a dropdown with the options "Show Mine" and "Show All."



- "Show Mine" displays the artifacts you have created, while "Show All" displays all artifacts in the project, including those created by others.
- Typically, you will have Create/Edit access for items under "Show Mine," but only View access for items under "Show All."

3.1 No Action Required – Just Review.





- Note: As part of this demo, some slides will display the above logo at the top of the slide to show that "No Action Required – Just Review."
- These slides will only contain explanatory text about the tool, and no action is needed from your side other than reviewing the information.





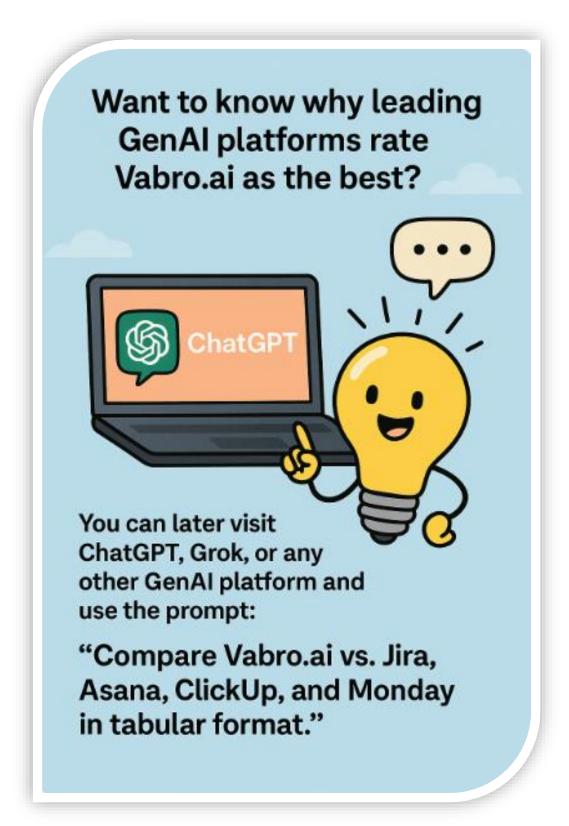












You can later visit ChatGPT, Grok, or any other GenAl platform and use the prompt: "Compare Vabro.ai vs. Jira, Asana, ClickUp, and Monday in tabular format."



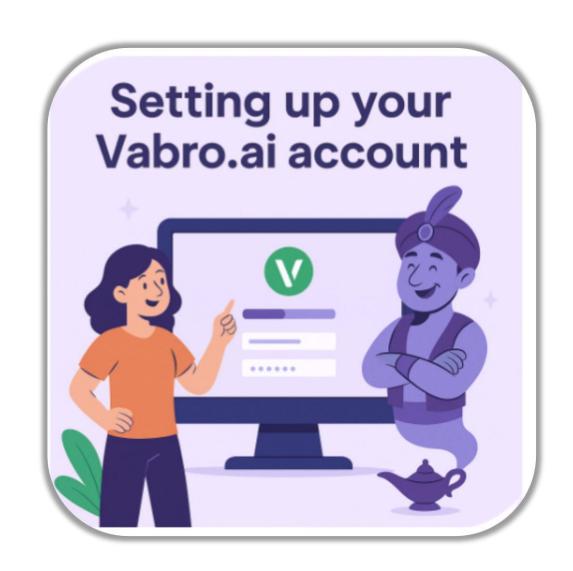
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- Using Al Template to Set Up an HR Workflow (5 minutes)
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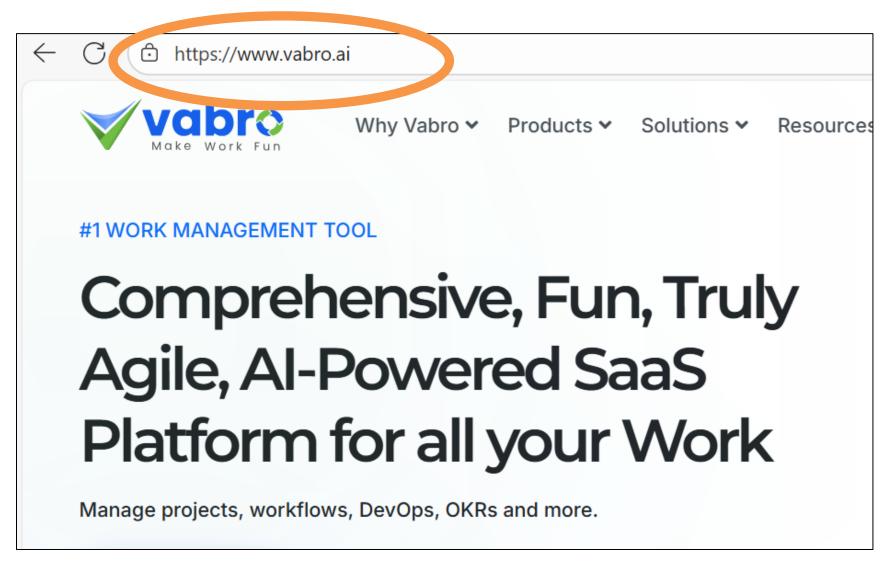


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- Kanban in Action A Complete Process Walkthrough (19 minutes)
- 150+ Features Bigger and Better (1 minute)
- Create entire process with your Al prompt (10 minutes)



3.2 Setting up your Vabro.ai account





- First, open another browser window and type
 'www.Vabro.ai' to visit the Vabro website.
- Note that you will need two active browser windows at any time:
 - One browser window to keep the webinar open
 - Another browser window for the Vabro.ai demo
 - First, listen to the steps in the webinar browser window, and then implement them in the Vabro.ai demo window.







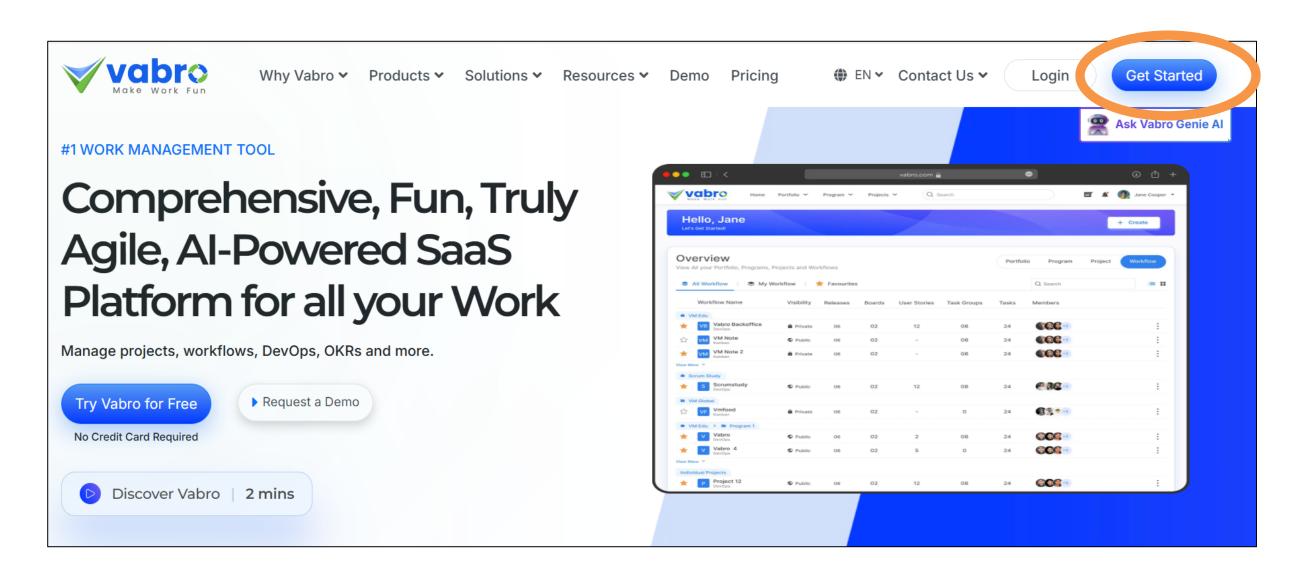
Repeating this because it is very important.

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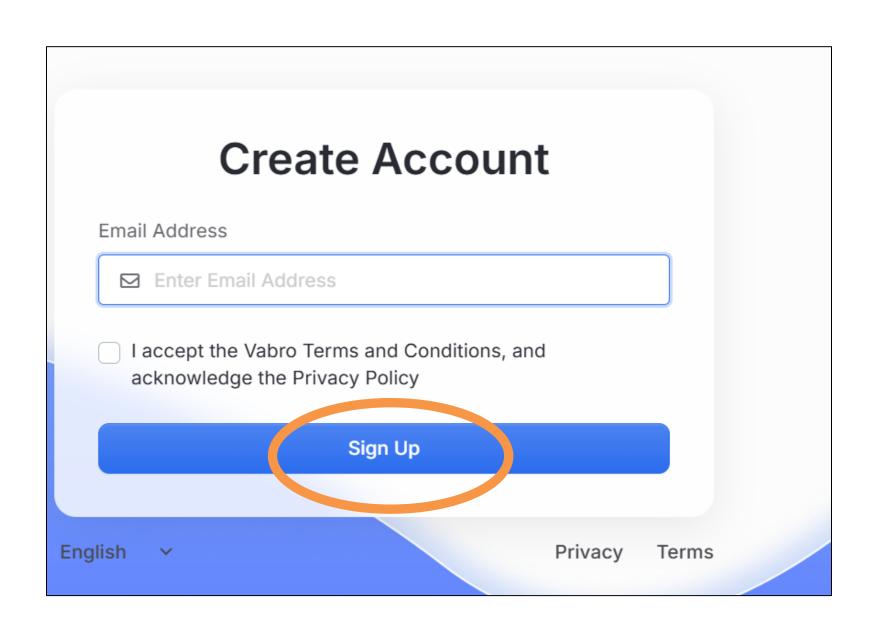
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 In the Vabro.ai website, please click the 'Get Started' button at the top right of the screen.".

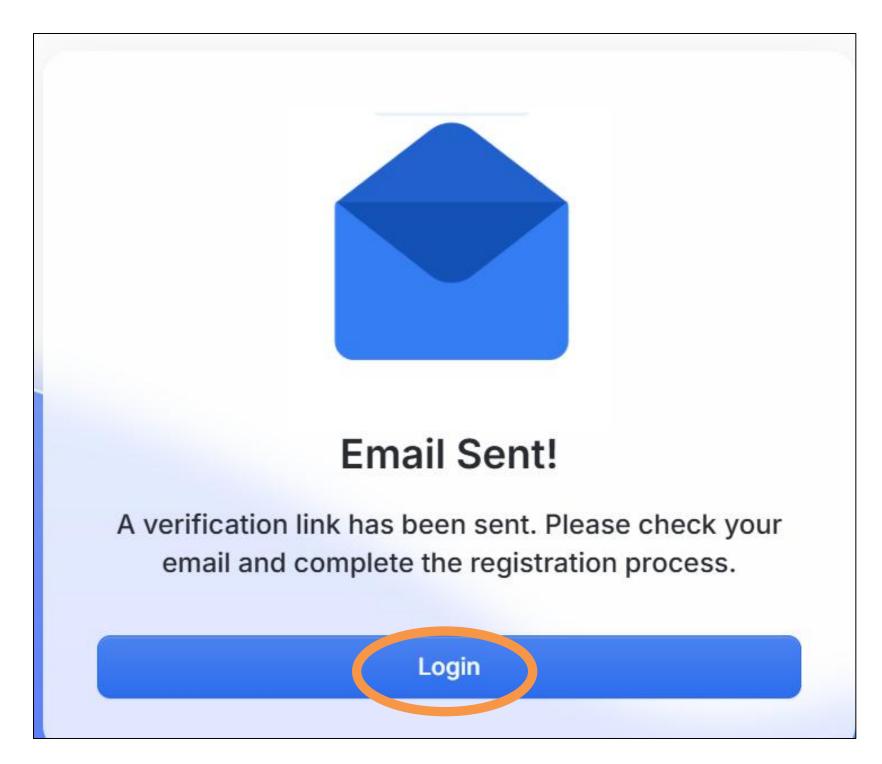




- That will take you to the "Create Account" page.
- Please enter your email address, accept the Vabro Terms, and click "Sign Up."

Please note that Vabro.ai is available in English, Spanish, German, Portuguese, Italian, and French. You can choose your preferred language when creating your account. For this demo, we will keep the default language as English.

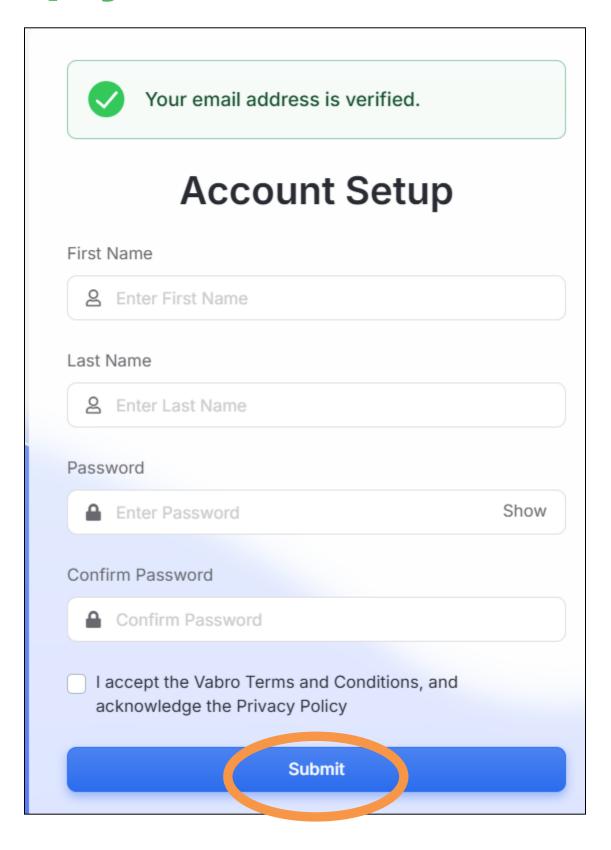




 A verification link will be sent to your email address. Please check your email and complete the registration process.

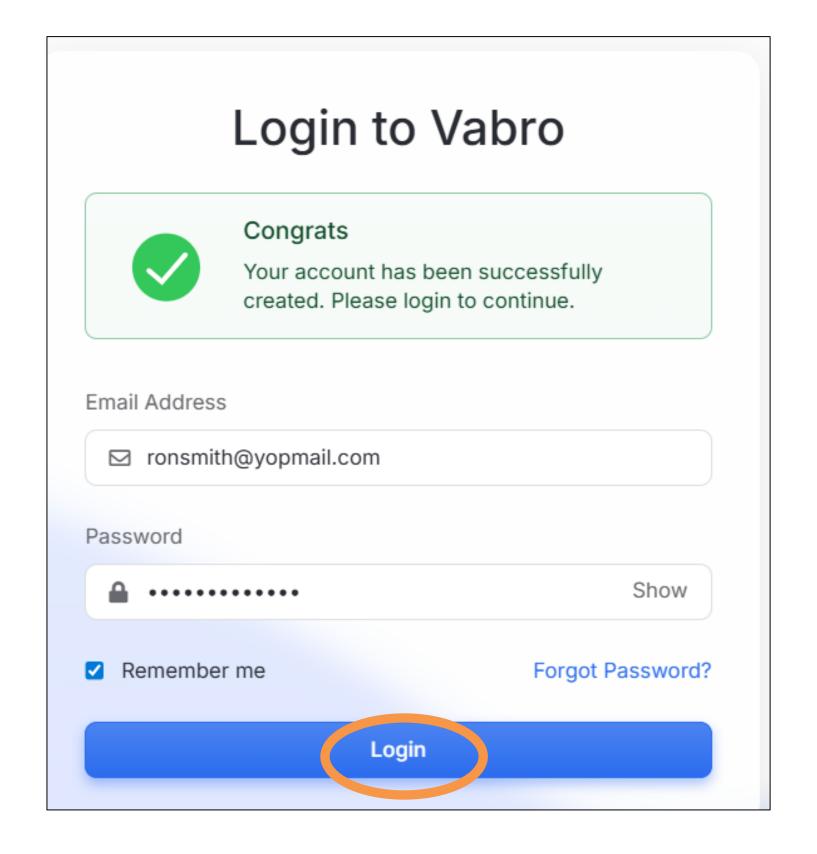
If you do not see the email in your inbox, please check your Spam folder.





- After email verification, you will be directed to the Account Setup screen, where you enter your first name, last name, and a preferred password.
- Once you have entered this information, click the Submit button to continue.

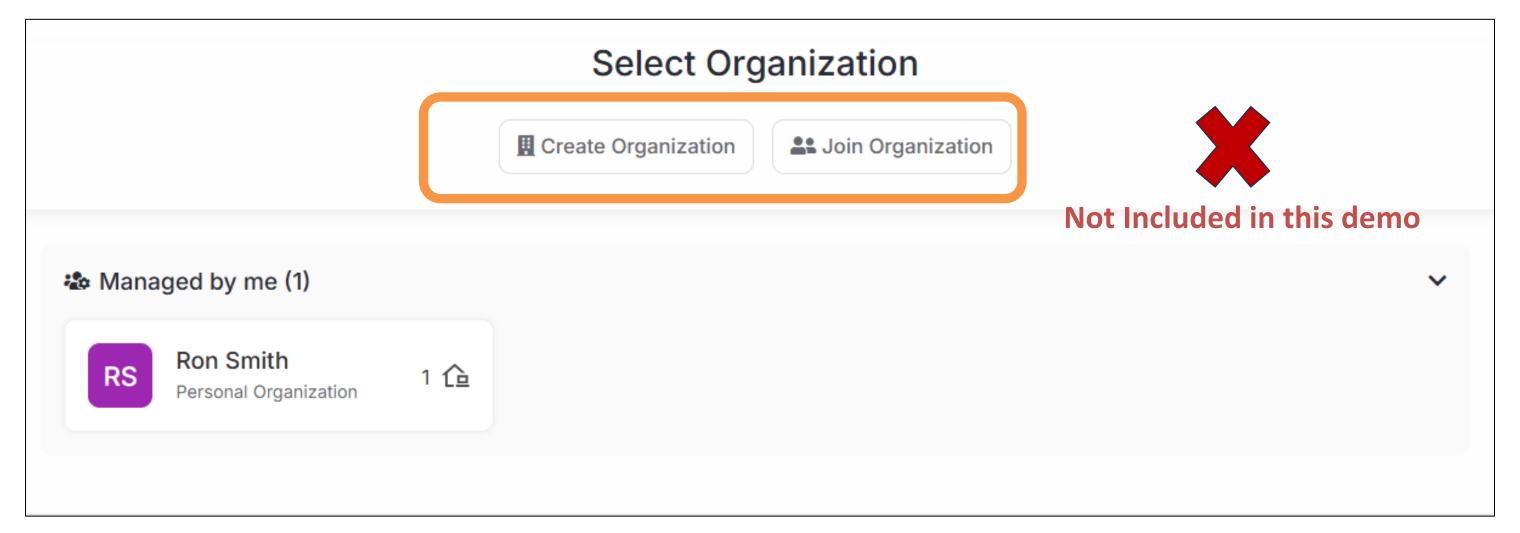




 Congrats! Your Vabro.ai account is now created. Enter your email address and selected password, check the "Remember me" box, and click the "Login" button to access your Vabro.ai account.

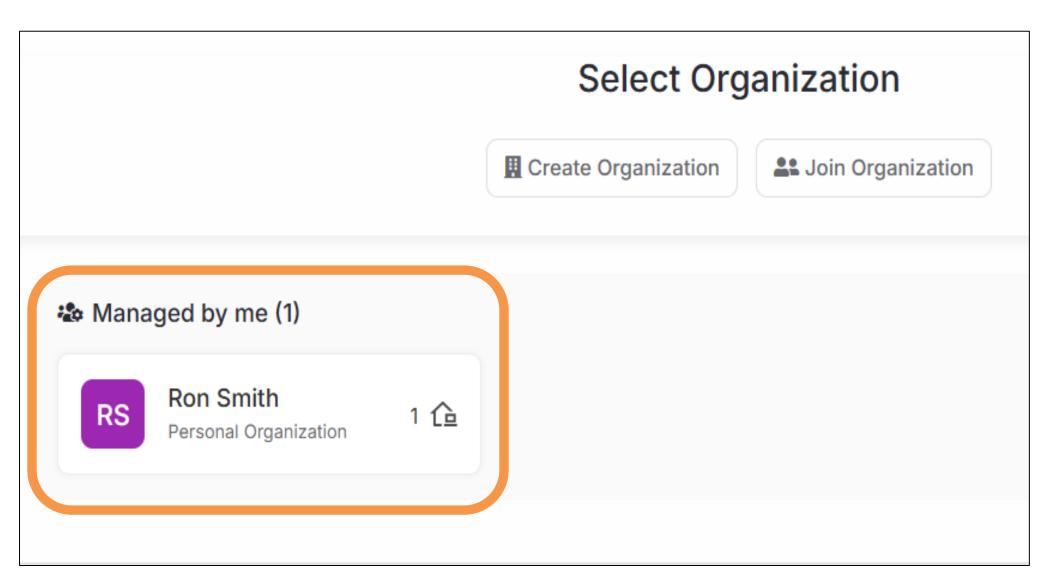






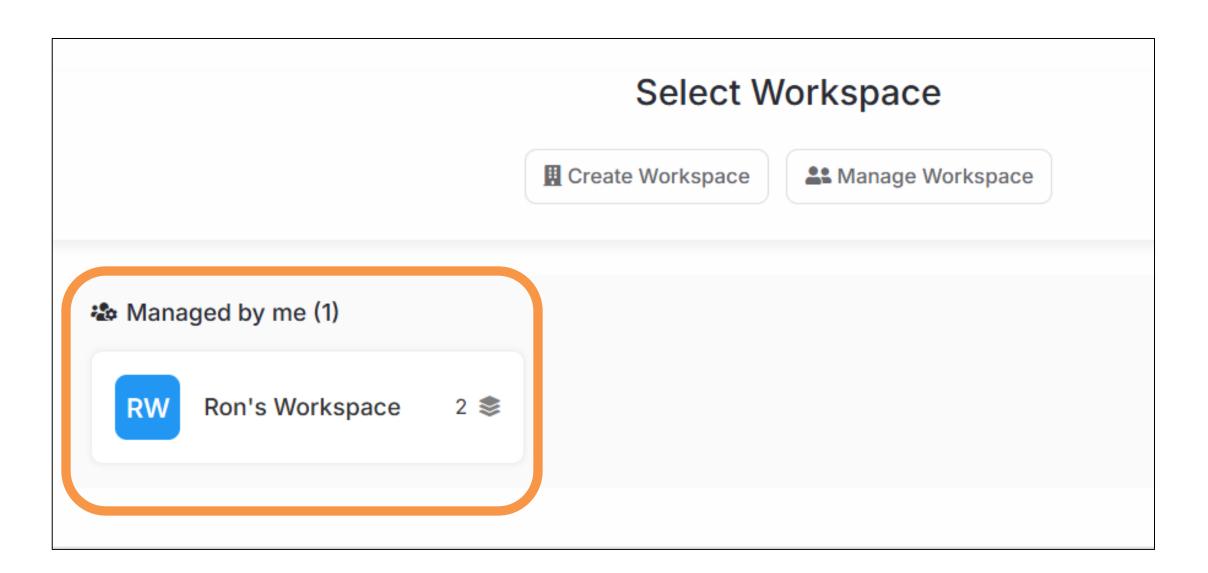
"Create Organization" or "Join Organization" is not included as part of this demo. To understand how to set up an entire organization in 3–5 mins using Vabro.ai, you can later visit $Vabro.ai \rightarrow Resources \rightarrow Demo\ Videos\ or\ Vabro.ai \rightarrow Demo\ Vabro.ai \rightarrow Resources \rightarrow Demo\ Videos\ or\ Vabro.ai \rightarrow Demo\ Vabro.ai \rightarrow Demo\ Vabro.ai \rightarrow Demo\ Vabro.ai$





- Note that Vabro.ai has also created a "Personal Organization" for you with your name. This can be used to try out all features of Vabro.ai for free.
- Note: Personal Organization allows only one User (but supports multiple roles). To add more Users, you will need to Create or Join an Organization.
- Please click "Personal Organization" to continue.





This will take you to your Workspace.

Please click on "Workspace" to continue.

3. Practical Implementation of Scrum with Al WKanbanstudy Using Vabro.ai





2. Setting up your Vabro.ai account (5 minutes)



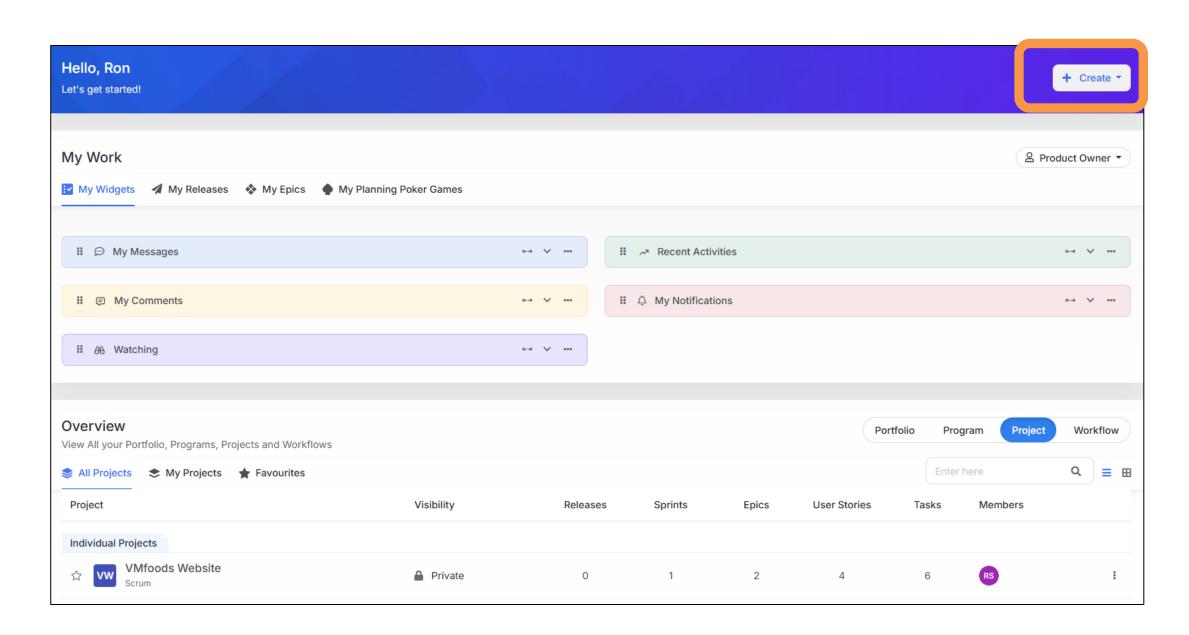
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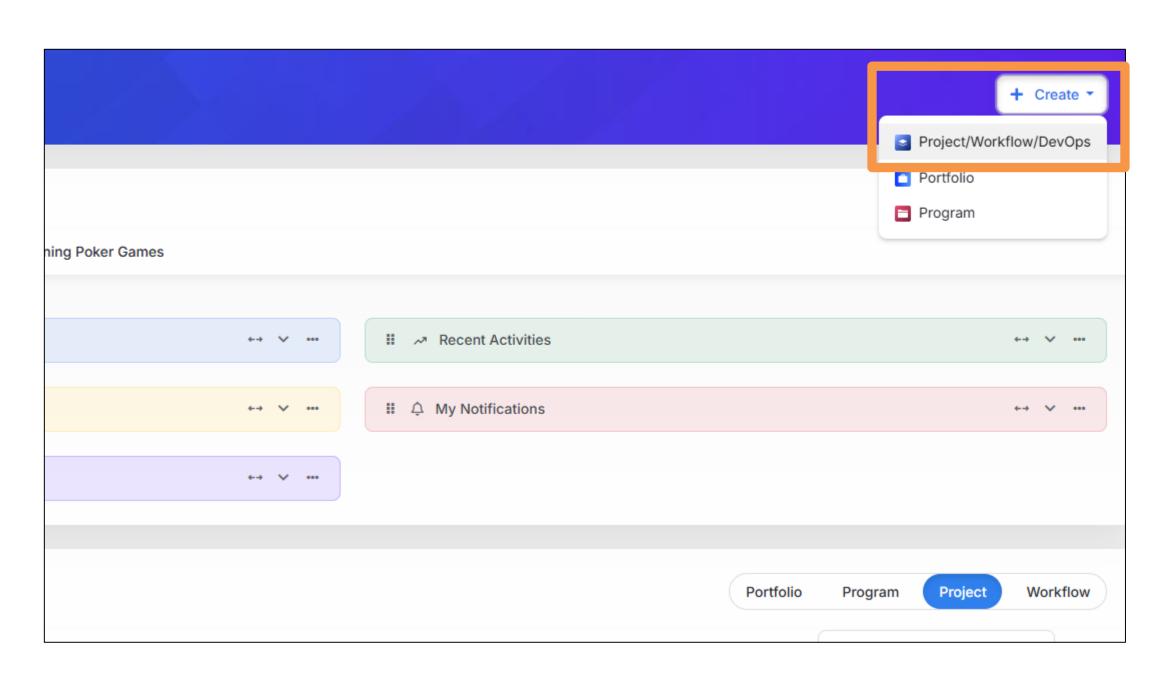






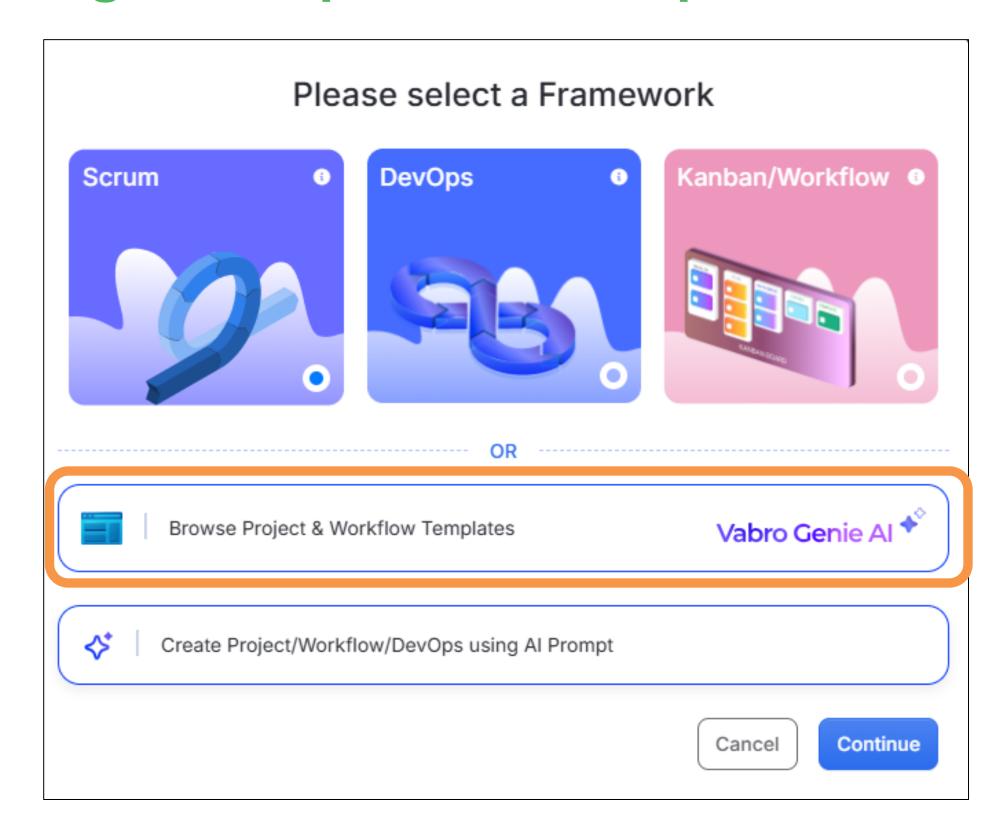
- Clicking on your Workspace
 name will display your dashboard
 with several features. We will
 ignore other items on this
 dashboard for now.
- Please click the "Create" button at the top right of the screen.





- When you click the +Create button, you will see three options.
- Please select the first option,
 "Project/Workflow/DevOps."

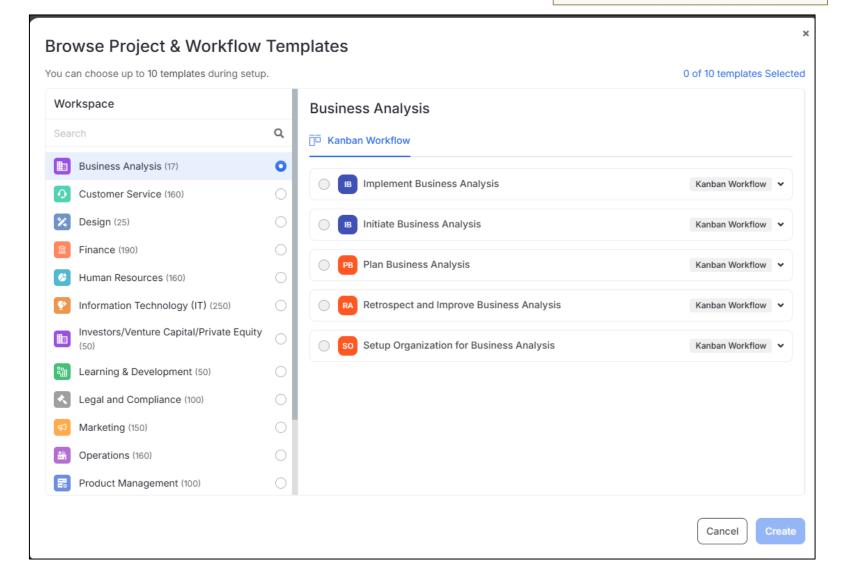




Please click on the first link
 "Browse Project and
 Workflow Templates."







No action is required on this slide — you can use any of these templates to set up workflows in your company later.

This will bring you to a window with 1500+ templates for 13 solutions, including Business Analysis, Customer Service, Design, Human Resources, and more. Please review these for **2 minutes**.

All these templates have been generated by Vabro Genie Al and reviewed by Subject Matter Experts — representing best practices in the industry. You can select any of these templates for any work in your company.

















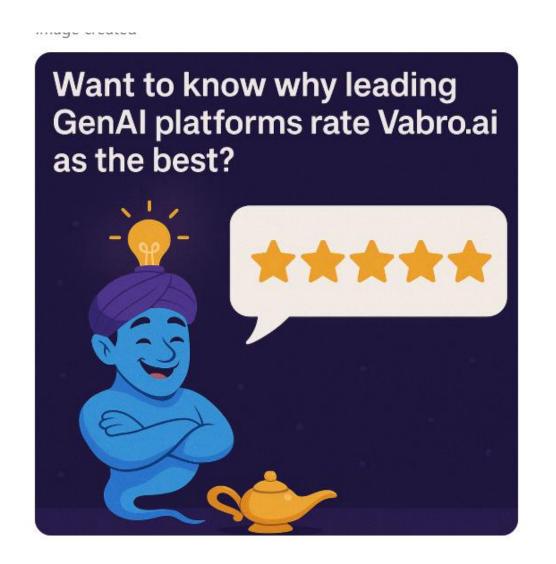


No other tool—such as Jira, Asana, ClickUp, or Monday—offers such a vast repository of high-quality templates. In those tools, you have to spend hours creating Kanban Workflows and Boards, but with Vabro, it takes a minute or less!



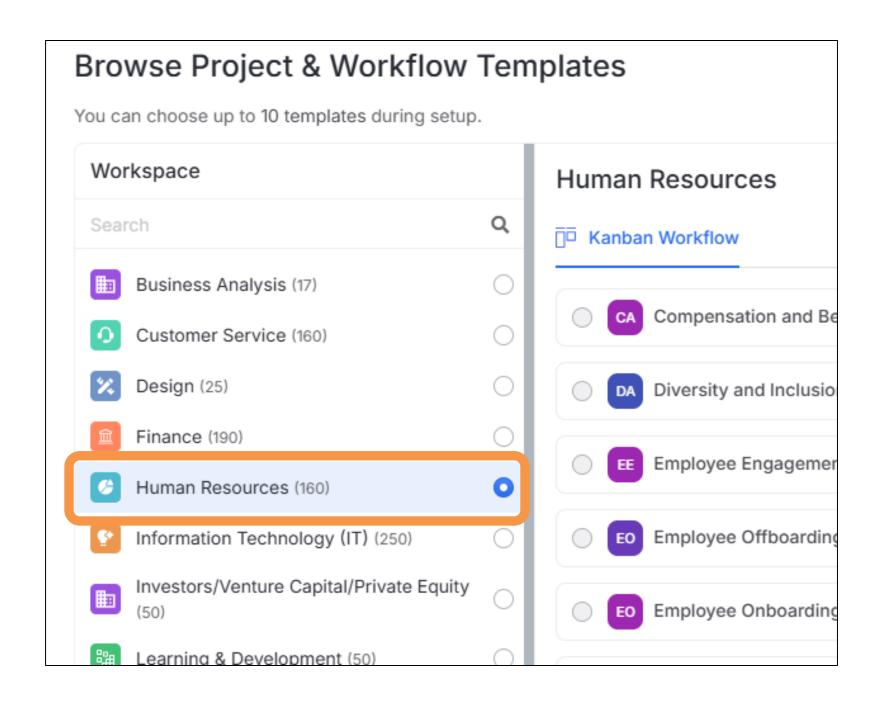
3.3 Using Al Template to Set Up an HR Workflow Kanbanstudy





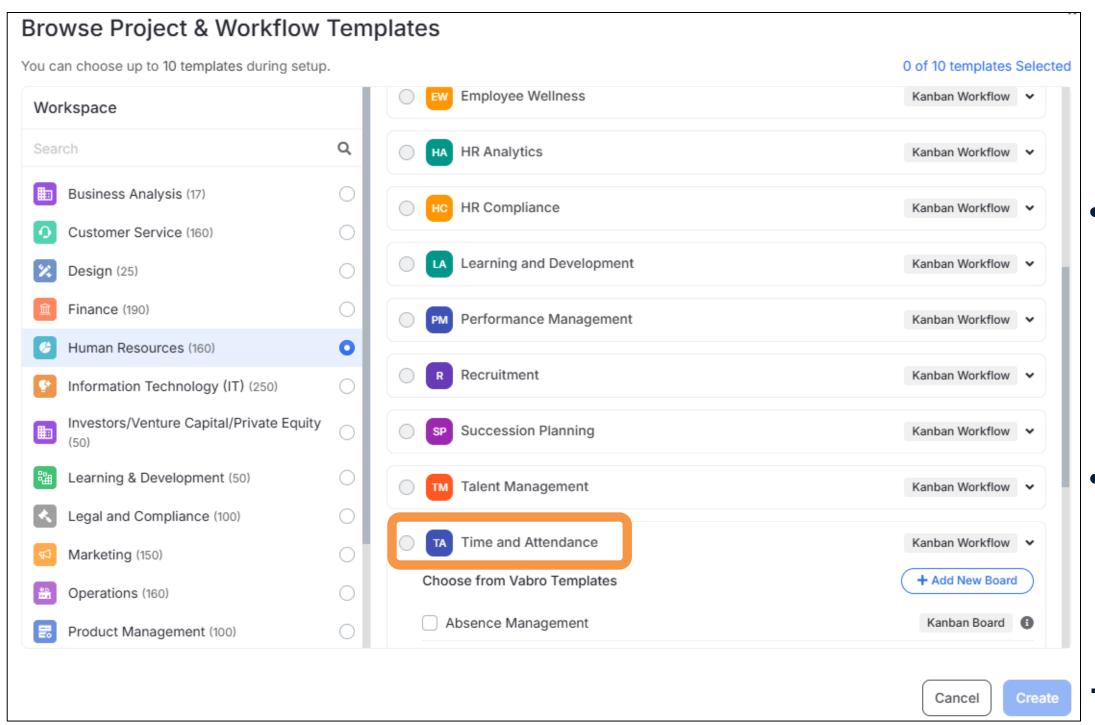
You can later visit ChatGPT, Grok, or any other GenAl platform and use the prompt: "Compare Vabro.ai vs. Jira, Asana, ClickUp, and Monday in tabular format."





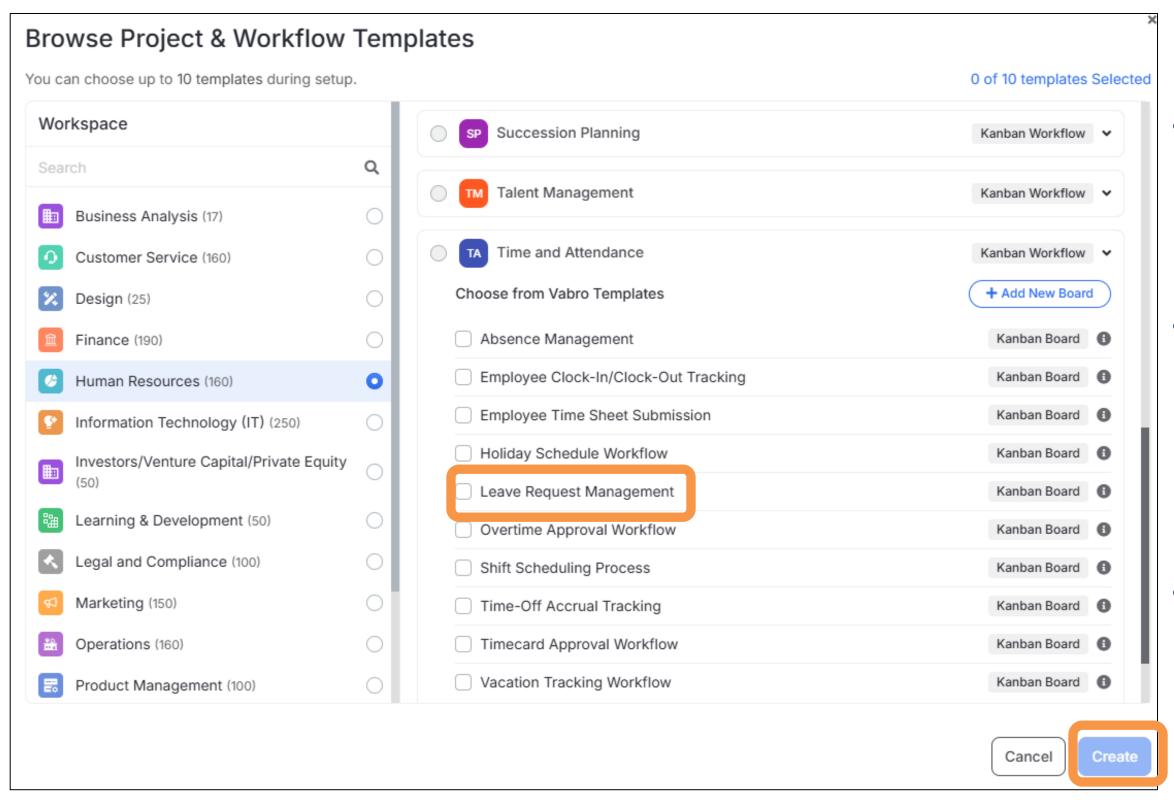
 In the left Menu, please click on "Human Resources" – this is the fifth option in the list.





- This shows multiple Kanban
 Workflows in the Human Resources
 Workspace or Department.
- Scroll down till you see the Workflow
 "Time and Attendance" click on that option.

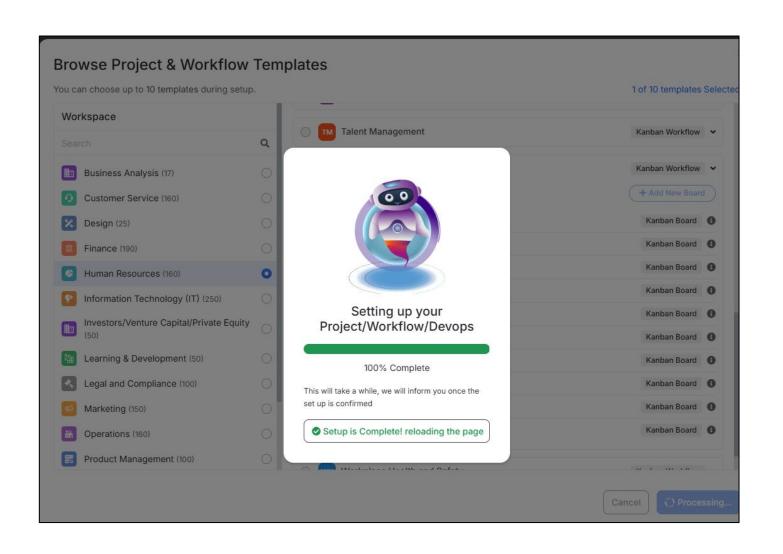




- A Kanban Workflow can have multiple Kanban Boards.
- For this demo, we will click on the Kanban Board titled "Leave Request Management."
- Then, please click on the Create button at the bottom right of the screen.

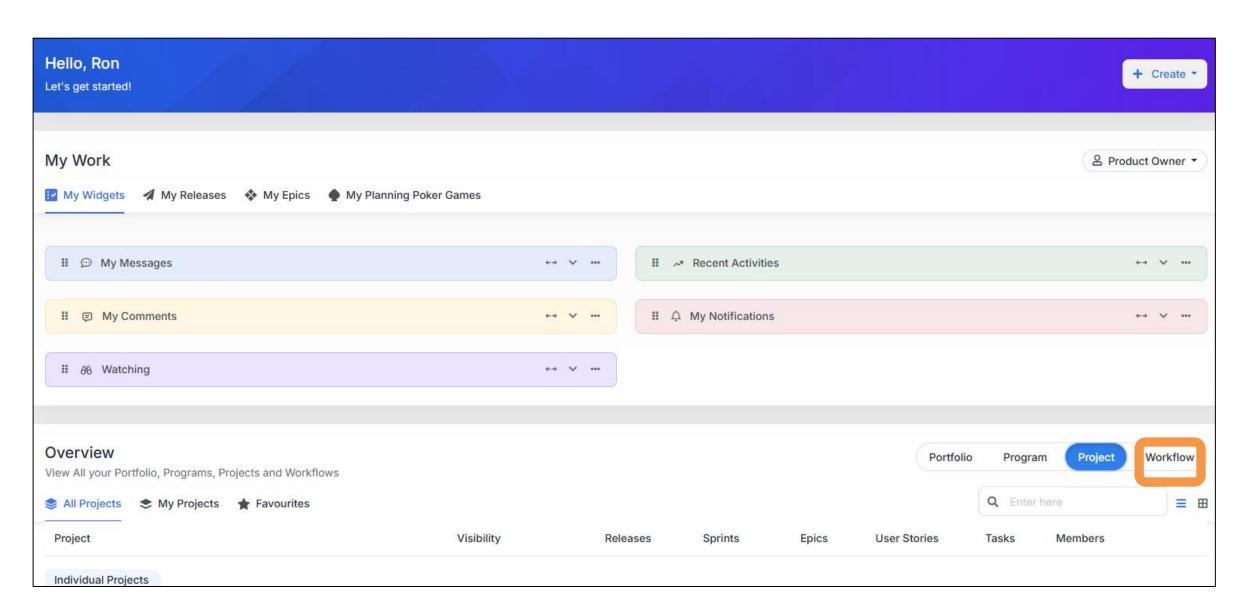






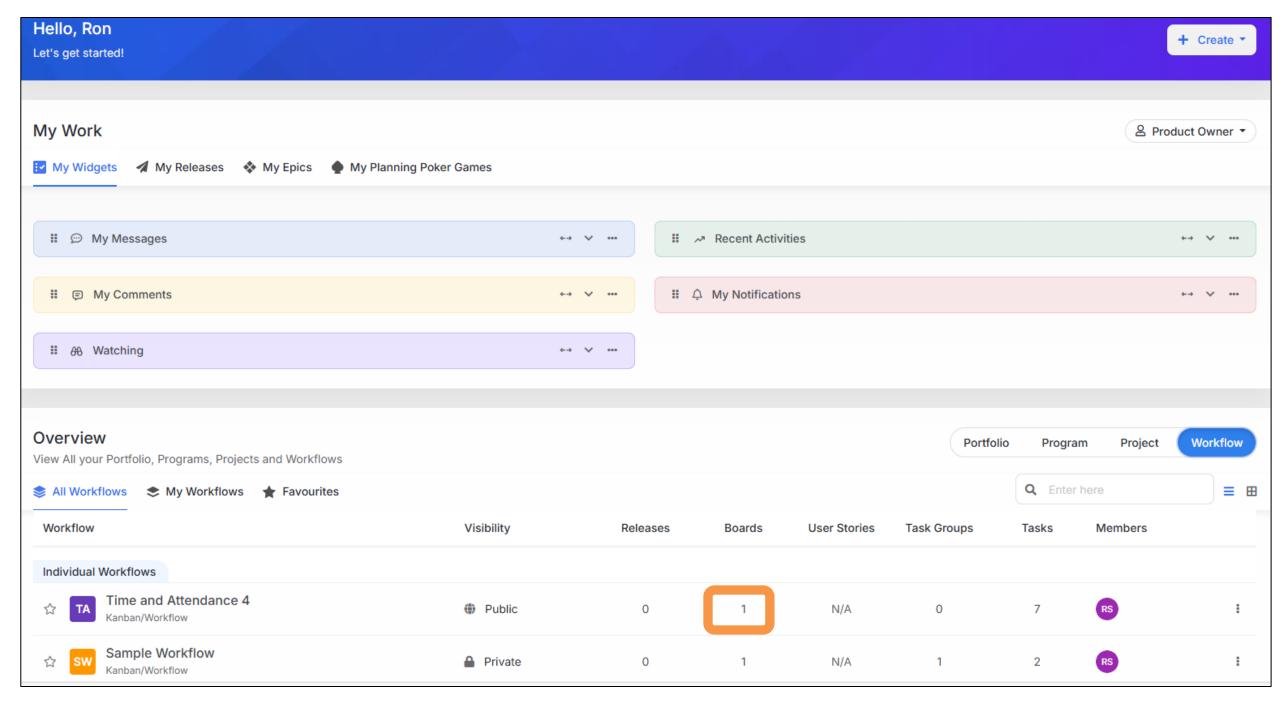
- You will see a message as Vabro Genie Al creates the Workflow for "Time and Attendance," along with the associated Kanban Board for "Leave Request Management."
- This process may take 30–45 seconds. No action is required during this time.
- Vabro Genie AI will create the entire workflow for Leave Request Management—including the Kanban Board, sample tasks, forms, and more.





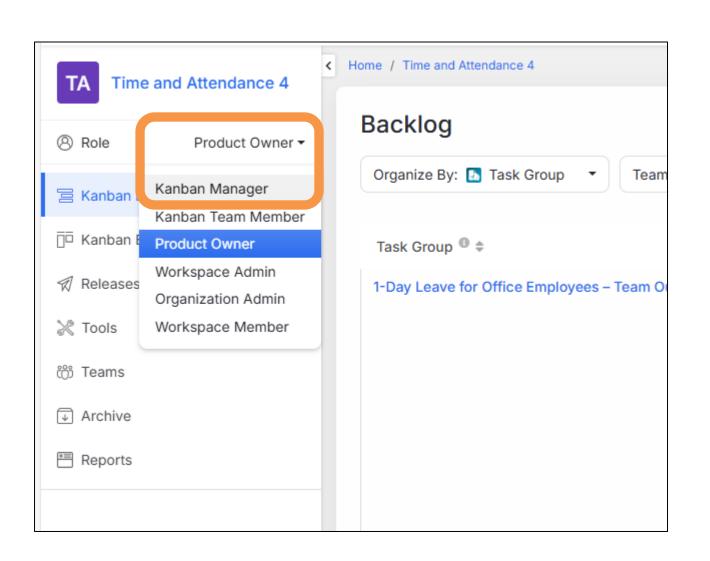
- This brings you back to your Dashboard.
- Your workflow is now created!
 We will now start reviewing the
 Kanban Board
- Please click on "Workflow" in the middle of the right side of the screen to continue.





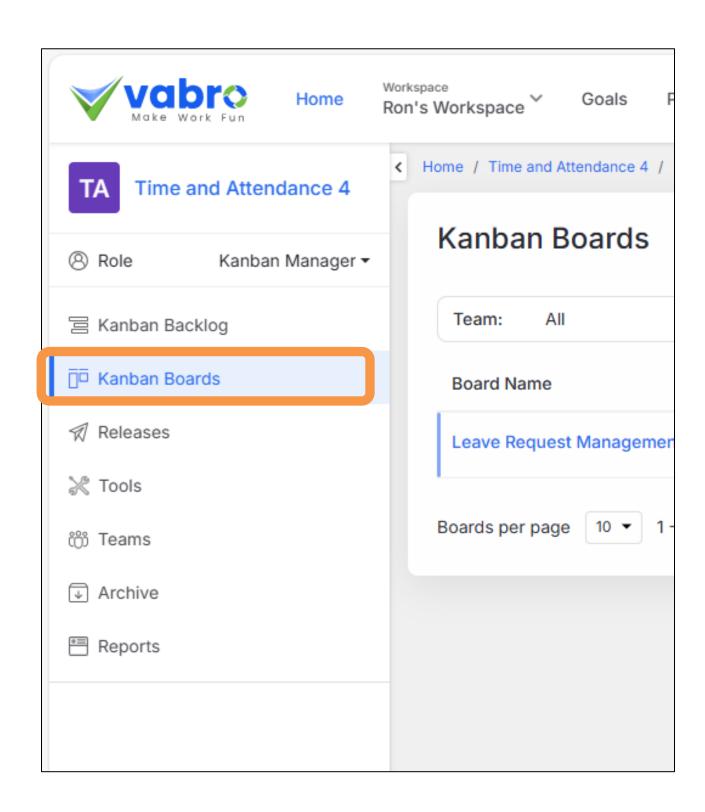
- This shows you the Workflows in your Dashboard.
- You can see the Workflow you just created for "Time and Attendance."
- Click on the number "1" under "Board" for the "Time and Attendance" Workflow.





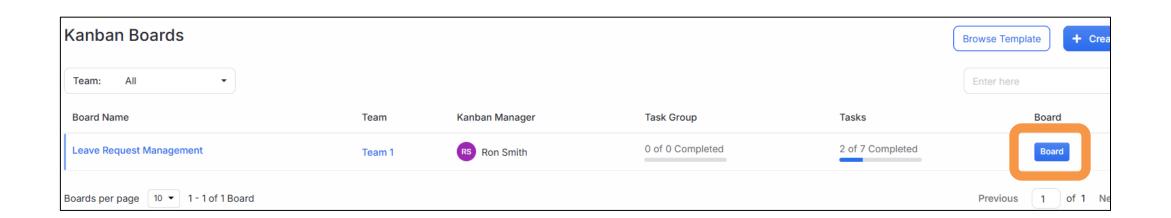
- In the top left corner, you will see a drop-down menu for Roles.
- Please click on the first option,
 "Kanban Manager."
- This will change the role for the demo to "Kanban Manager," and we will use this role for the session.





- You will now see the "Time and Attendance" Workflow board.
- Click on "Kanban Boards" in the left menu to continue.

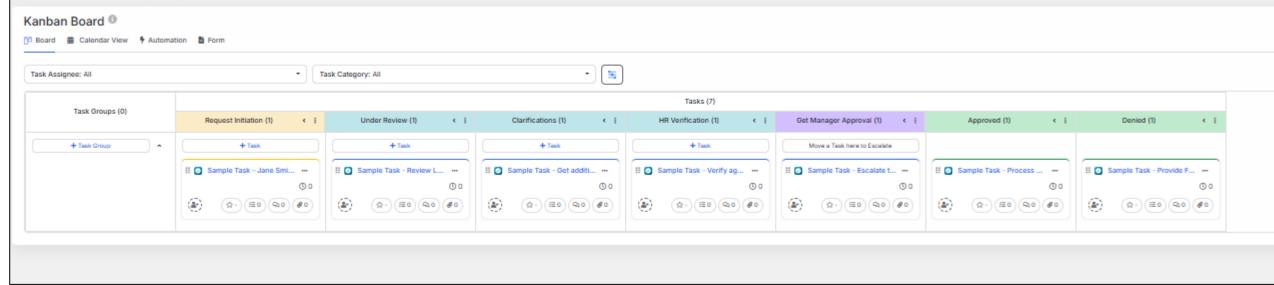




- You will now see the details for the "Leave Request Management" Kanban Board.
- Click on the "Board" button on the right to continue.







- No action is required—just have a quick look the Kanban Board columns.
- Do you think this represents the steps an HR Manager follows for Leave Request Management? Note that you can make changes to the board as needed.

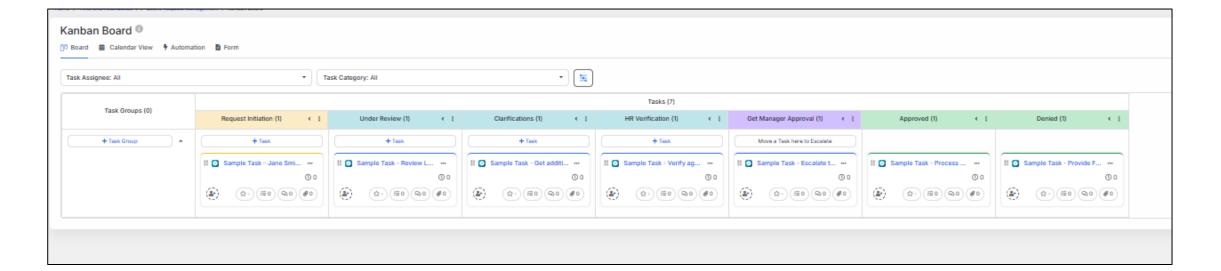
Scroll to the right to view the different columns in the
 Kanban Board created for you by Vabro Genie AI.

The columns are:

- Request Initiation
- Under Review
- Clarifications
- HR Verification
- Get Manager Approval
- Approved
- Denied







No action is required—please review for one minute.

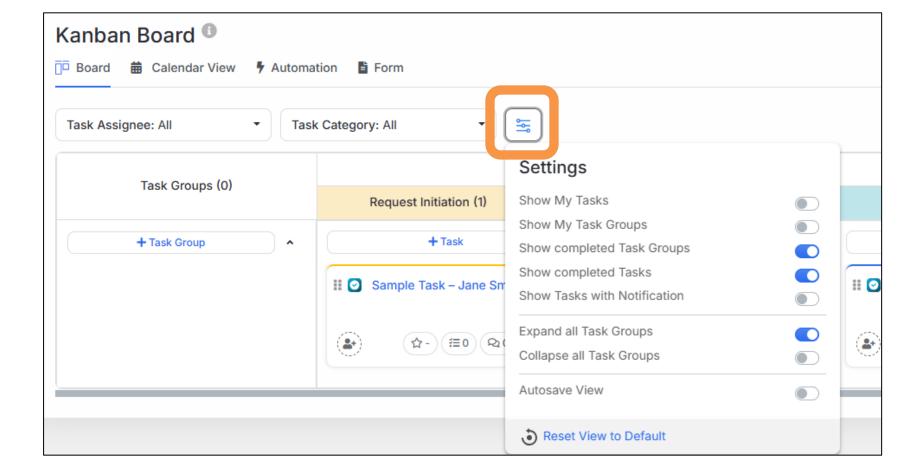
Vabro.ai visually differentiates the actions performed by each column in a Kanban Board.

You will notice that the column names are in different colors depending on the column type:

- To Do columns are Yellow: Request Initiation
- In Progress columns are Blue: Under Review, Clarifications, HR Verification
- Escalation columns are
 Purple: Get Manager Approval
- Done columns are Green:
 Approved, Denied







No action is required—please review for 15 seconds.

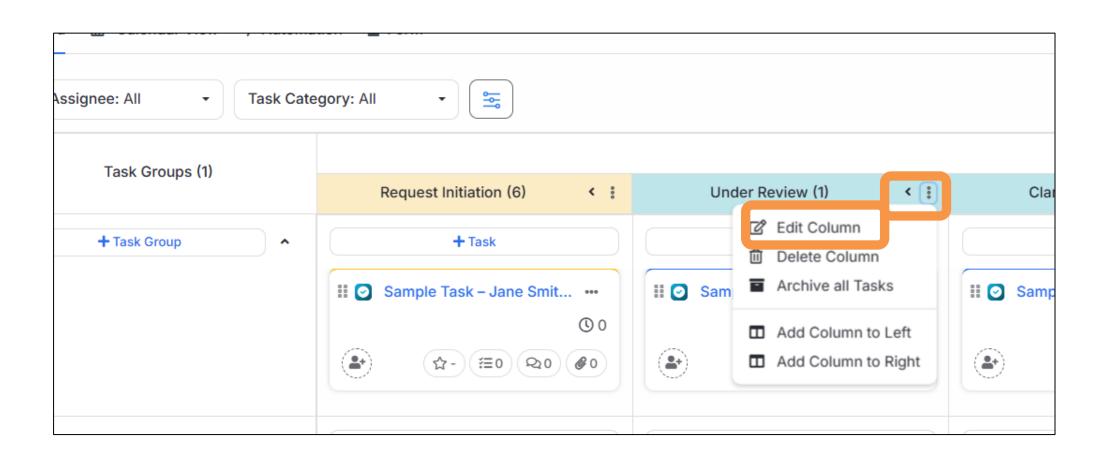
At the top of the Kanban Board, you will notice that Vabro.ai allows you to view tasks based on Task Assignee and Task Category.

You will also see a button next to Task Category.

Clicking this button provides additional options to view tasks in the Kanban Board.

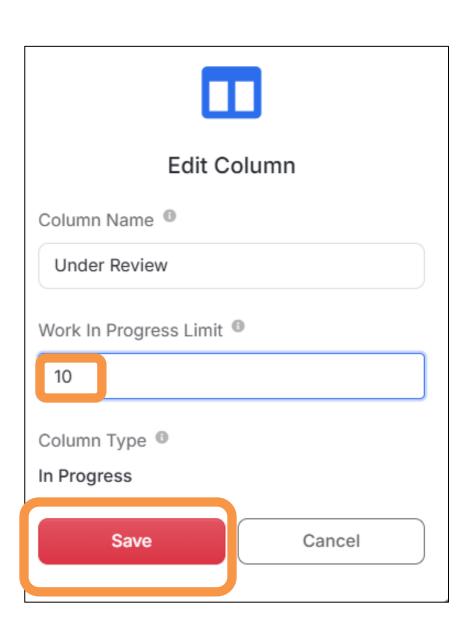
These features are very useful for managing even complex Kanban Boards with thousands of tasks.





- Above the column named "Under Review," please click on the icon with three dots
- This will show you the Options available for each column namely:
 - Edit Column
 - Delete Column
 - Archive all Tasks
 - Add Column to the Left
 - Add Column to the Right
- Please click on the first Option "Edit Column"

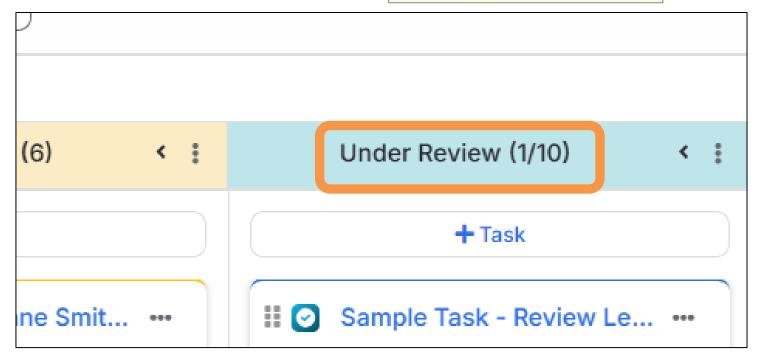




- This will bring you to the "Edit Column" menu.
- Under Work in Progress Limit, enter "10."
- Then click on the "Save" button.



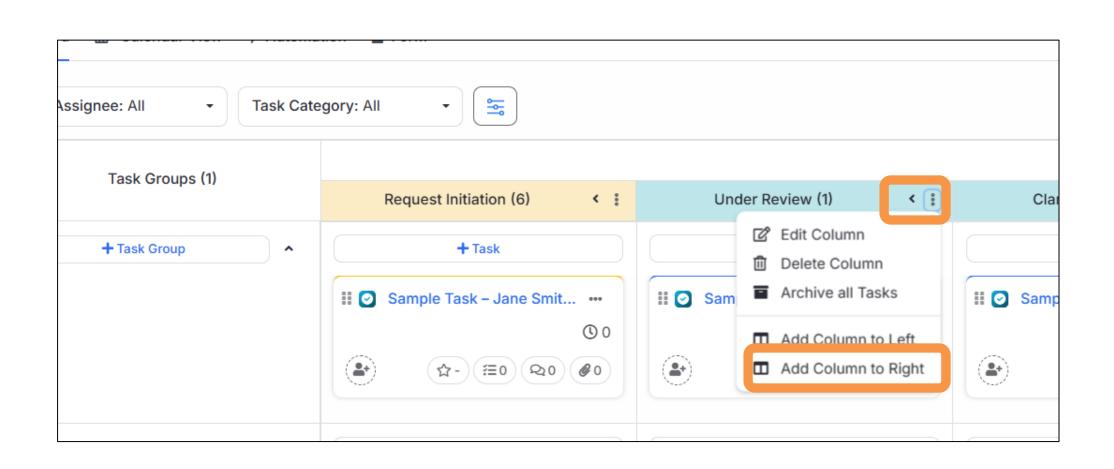




- This brings you back to the Kanban
 Board. When you view the "Under
 Review" column in the Kanban Board, it
 now shows Under Review (1/10).
- This indicates maximum Tasks allowed in this column is 10

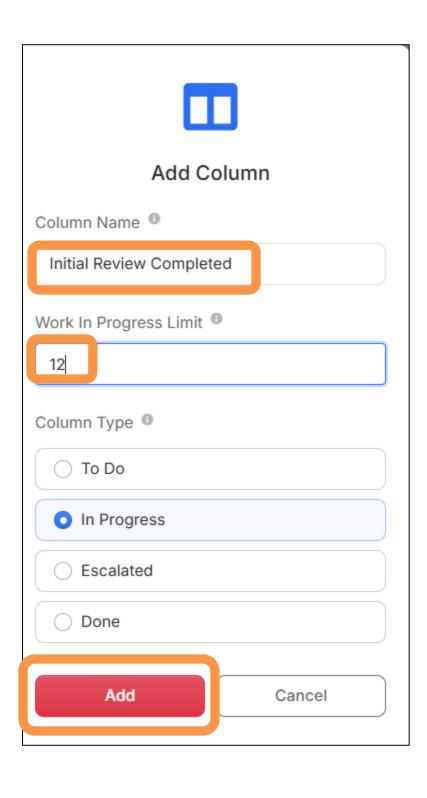
 You have now learned how to easily set a Work in Progress Limit for any column!





- Again, above the column named
 "Under Review," please click on the icon with three dots
- Now please click on the last Option "Add Column to the Right"



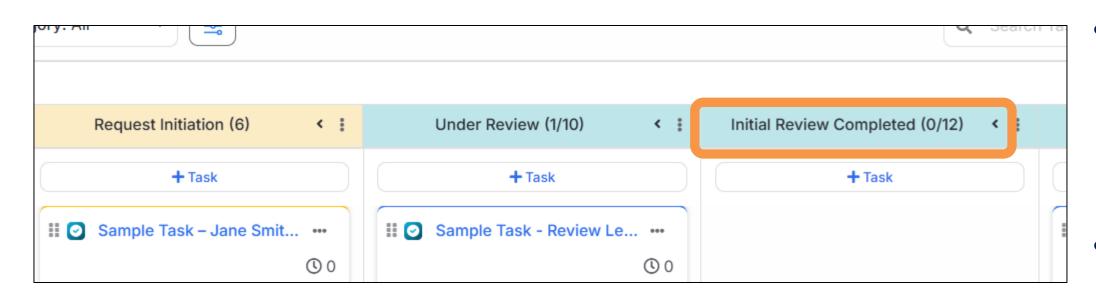


- This will bring you to the "Add Column" menu.
- Under Column Name, enter "Initial Review Completed."
- Under Work in Progress Limit, enter "12."
- Leave the Column Type as "In Progress"
- Then click on the "Add" button.





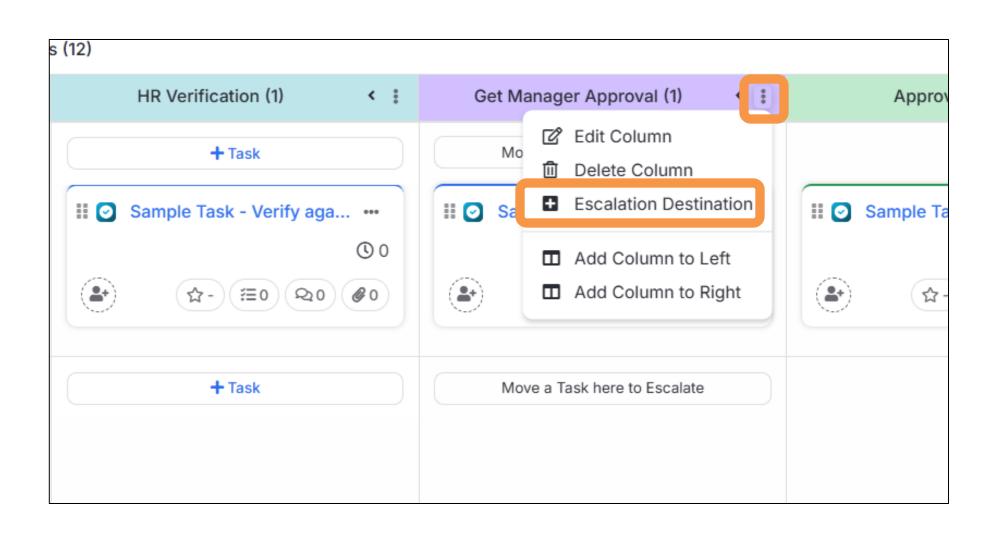
You will now see a new Column added
 "Initial Review Completed (1/12) ".



1/12 indicates the WIP limit of the column is set to 12.

- The Blue color indicates this is an "In Progress" Column
- You have now learned how to add a new column!

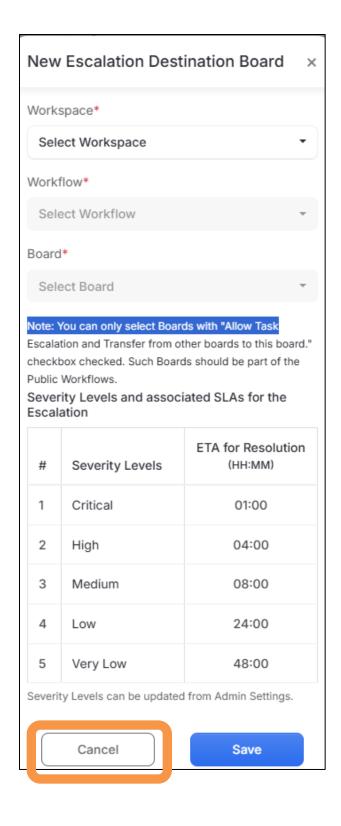




- Now please scroll to the right till
 you see the Escalation Column
 titled "Get Manager Approval."
 Above this column, please click
 on the icon with three dots
- Now please click on the third
 Option "Escalation Destination"







- Escalation to Another Board: Please review the Escalation Menu, which allows you to set whether tasks from this board need to be escalated to another Board and define any associated severity levels for the escalations. For example, the HR Leave Request Team can use this feature to escalate any technical issues to the Technical Customer Support Board.
- Escalation to Another Person: Vabro.ai also allows escalations to other people. For example, the HR executive in the Leave Request Management Board may need to escalate to the HR Manager for certain approvals.
- We will discuss this later during the demo. For now, please click on the "Cancel" button.



Escalations are a powerful and essential feature for efficiently managing Kanban Workflows.

Other tools typically require complex APIs, coding, or automations to set up escalations, and even then, cross-organization escalation may not be possible.

Vabro.ai is the only tool that lets you easily cet up and manage escalations across different departments and people in an organization through your Kanban Boards—just a few clicks are enough, with no complex coding required!



10-minute Break



10 minute Break





Setting up your Vabro.ai account (5 minutes)



Using Al Template to Set Up an HR Workflow (5 minutes)







- Exploring Task Groups and Tasks (20 minutes)
- 6. Collaborating using Al-powered Forms (25 minutes)
- Kanban in Action A Complete Process Walkthrough (19 minutes)
- 150+ Features Bigger and Better (1 minute)
- Create entire process with your Al prompt (10 minutes)



10-minute Break



Steps to prepare for the Vabro.ai demo (10 minutes)



Setting up your Vabro.ai account (5 minutes)



Using Al Template to Set Up an HR Workflow (5 minutes)



Understanding the Kanban Board (20 minutes)

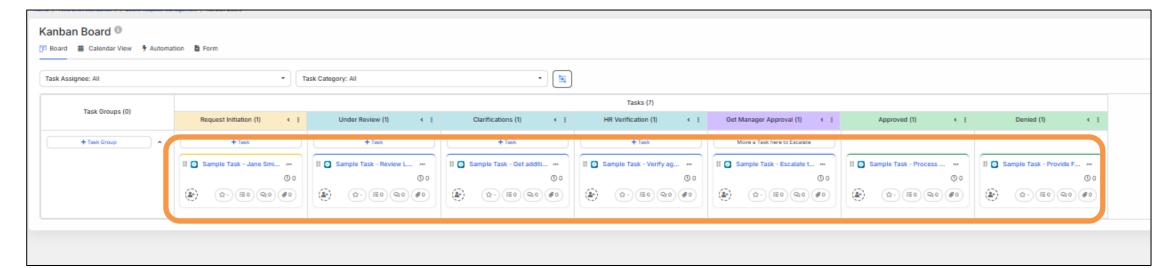


- 5. Exploring Task Groups and Tasks (20 minutes)
- 6. Collaborating using Al-powered Forms (25 minutes)
- Kanban in Action A Complete Process Walkthrough (19 minutes
- 150+ Features Bigger and Better (1 minute)
- Create entire process with your Al prompt (10 minutes)





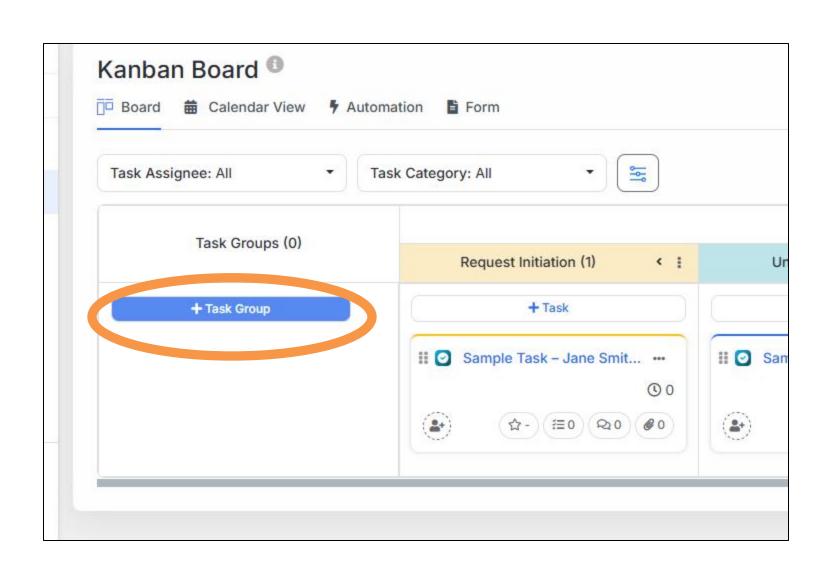




- Next, spend 30 seconds reviewing the sample Tasks created by Vabro Genie AI for you.
- The objective is to give you an idea of what Tasks in different columns may look like.

 No action is required—please review for 20 seconds.

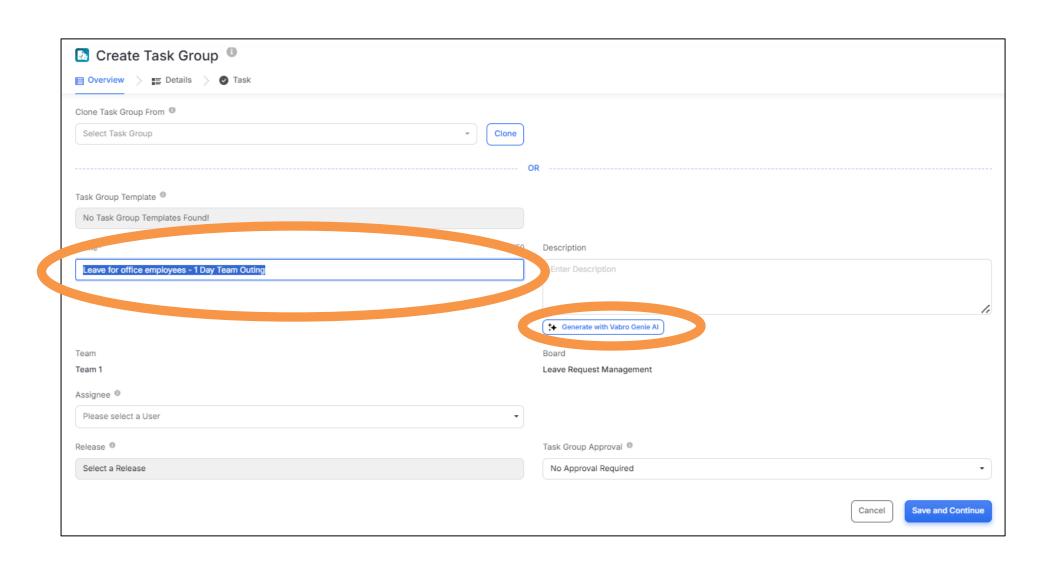




 Now that we have reviewed the Kanban Board, let's create a Task
 Group and its associated tasks in this Kanban Board.

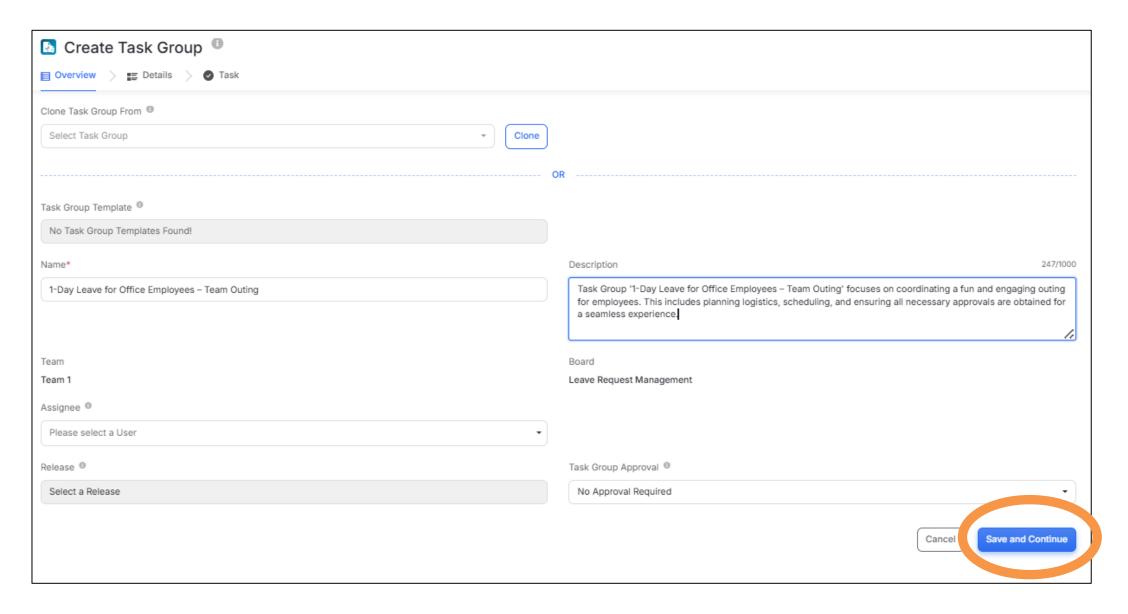
 Click on the +Task Group button to continue.





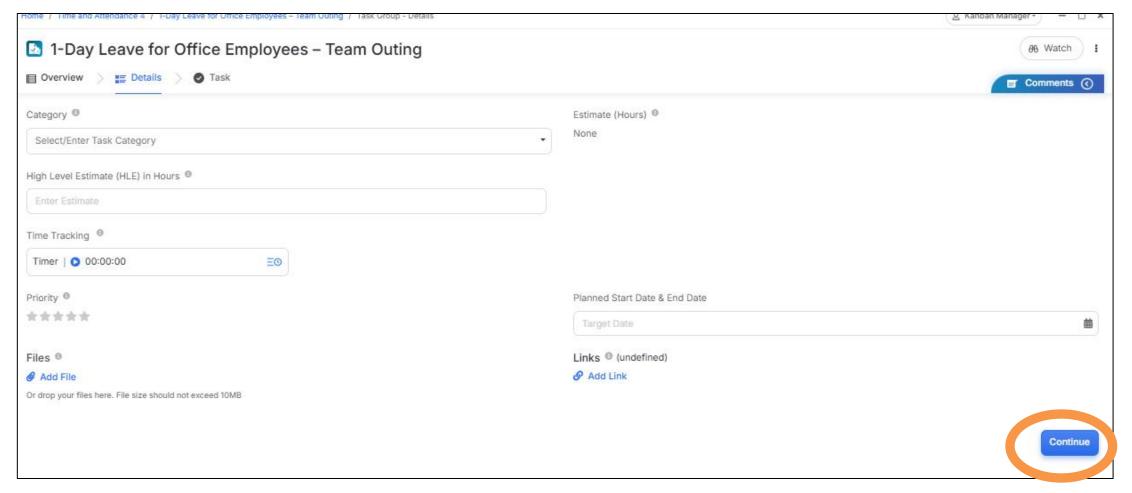
- This opens the "Create Task Group" window.
- In the Name field, please enter:
 "1-Day Leave for Office Employees –
 Team Outing."
- Then, under the Description field, please click on "Generate with Vabro Genie Al."





- Review the description of the task created by Vabro Genie Al—does it look high-quality?
- Spend 1 minute and click on the "i" button above Clone, Assignee, Release, and Task Group Approval to understand what these terms mean. We will not use these features right now.
- Then, Click on the "Save and Continue" button at the bottom right.



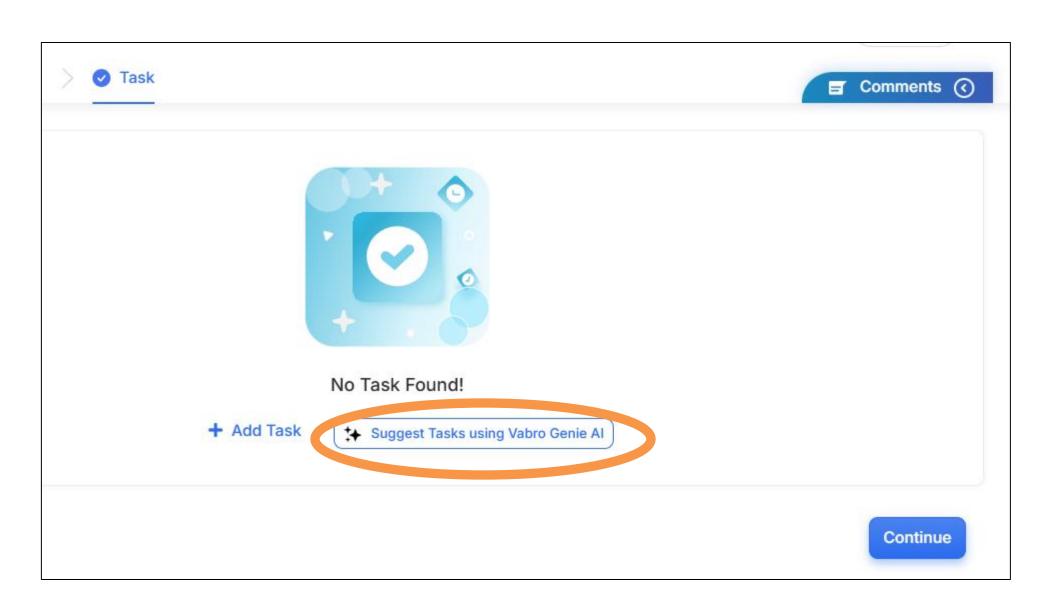


This will take you to the "**Details**" tab, where you can optionally set categories, estimates, time tracking, priorities, and even attach files or links.

 These fields are optional, so we'll skip them for now.

• Please click the "Continue" button at the bottom right of the screen.

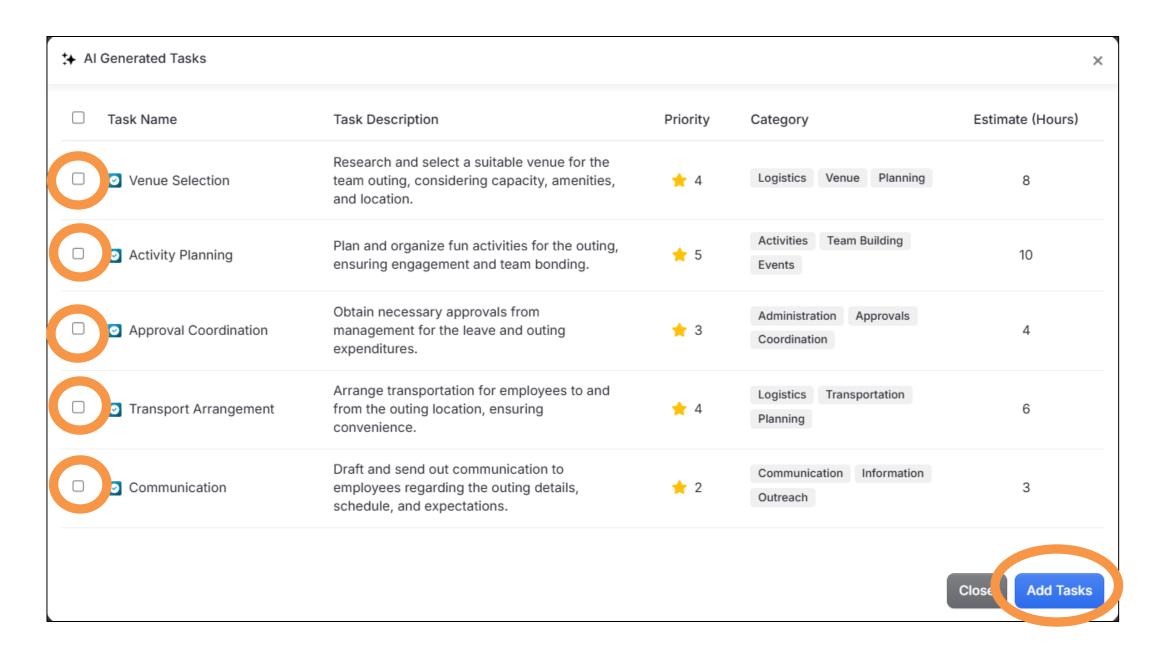




This will take you to the "Tasks" tab.

 Tasks can be added manually, but for this demo, please click the "Suggest Tasks using Vabro Genie Al" button.

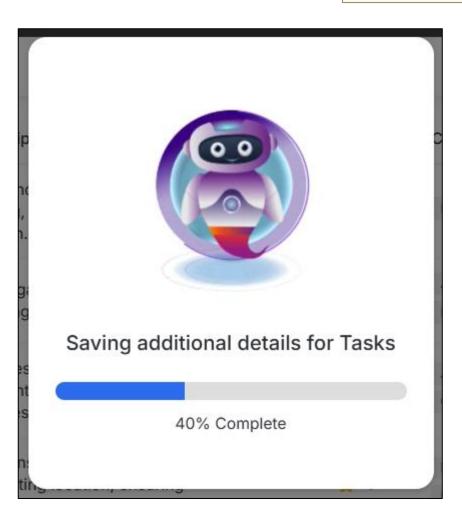




- You will see that Vabro Genie Al generates Tasks for you—this includes Task descriptions, priority, category, and even estimates. Please note that you can edit the Tasks or add new ones later.
- Please spend two minutes reviewing the Tasks created. Are they high-quality and relevant?
- Then select the all the Tasks and click on "Save Task."

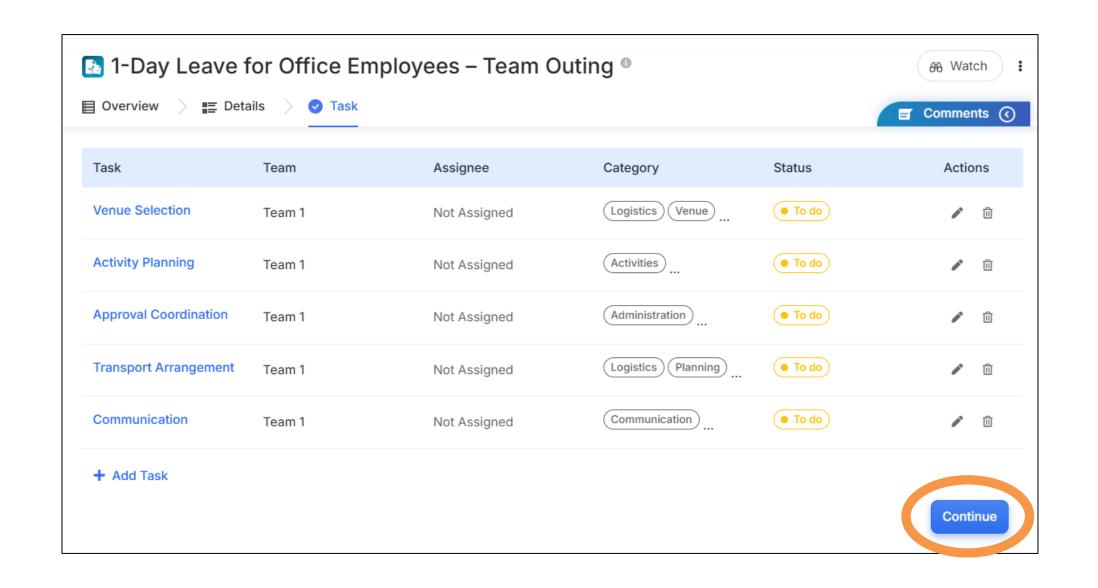






 You will see a Vabro Genie Al Logo saving all the Tasks.



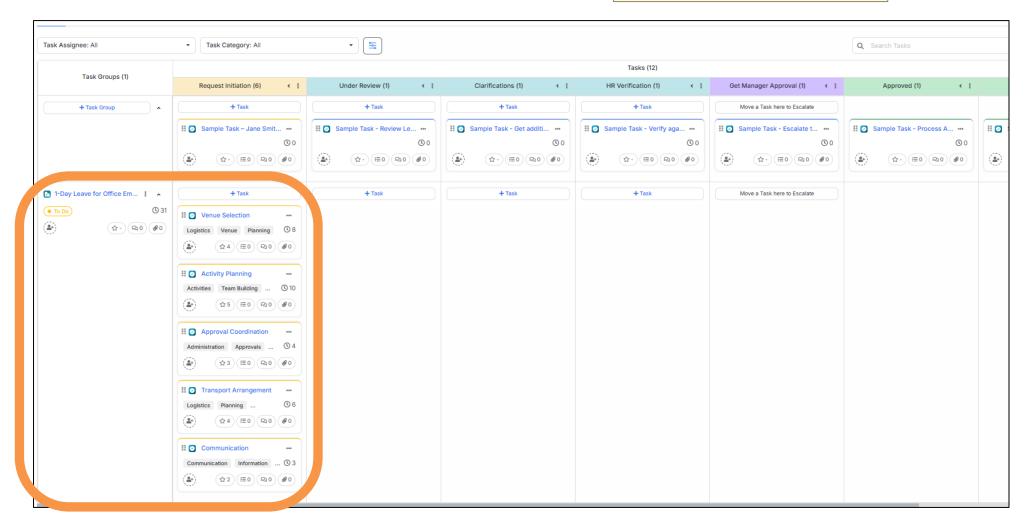


- You will now be taken to a page where you can see the summary of tasks created by Vabro Genie Al.
- On this screen, you can edit or delete tasks as needed.

 For this demo, please click on the "Continue" button.





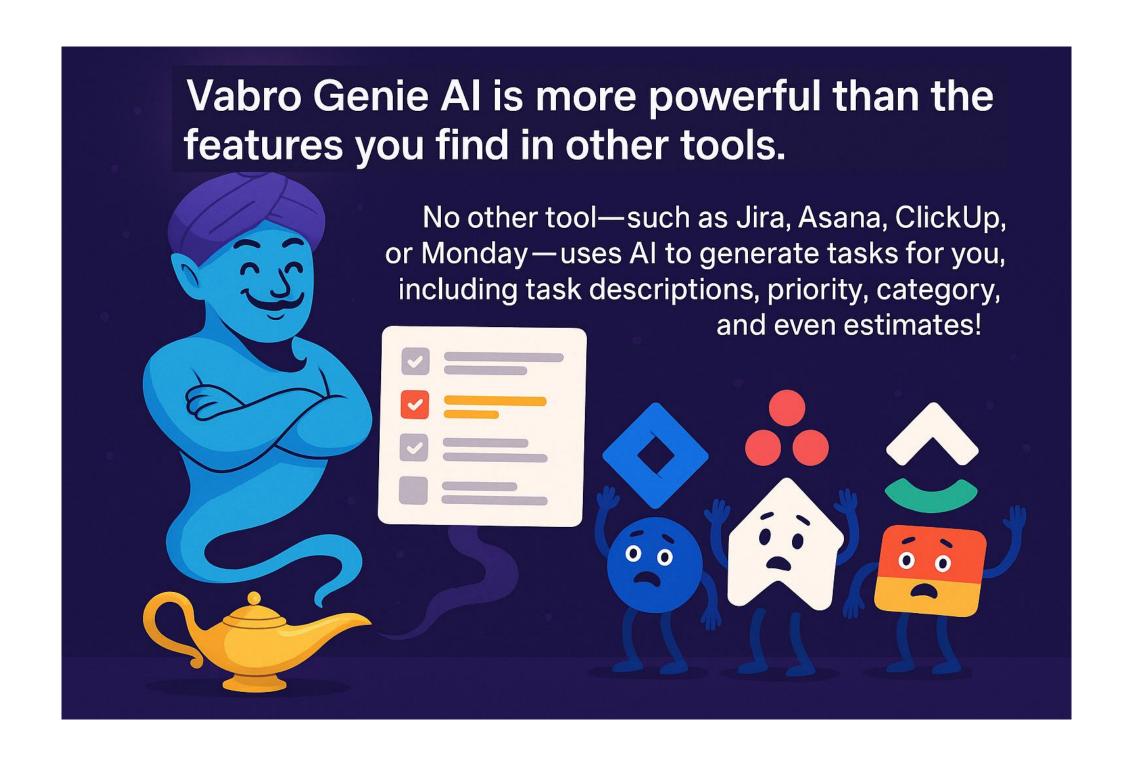


 This takes you back to your Kanban Board.

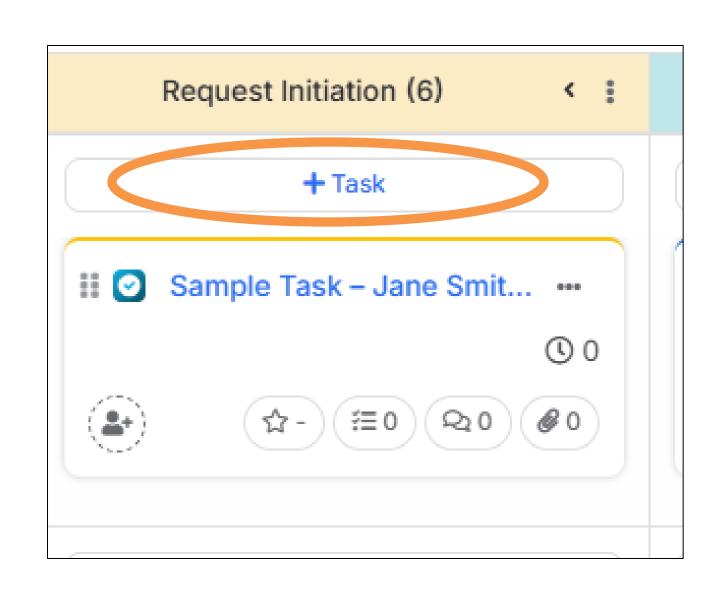
 You will see that the Task Group and Tasks have already been added to the Kanban Board!

 With Vabro Genie AI, it takes less than one minute to create Task
 Groups and Tasks!



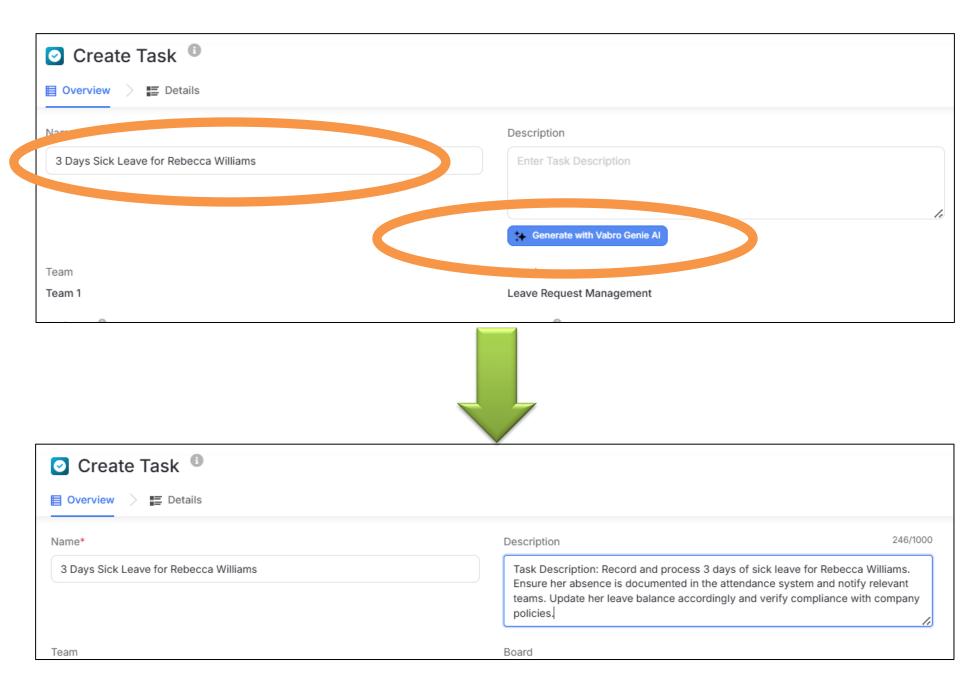






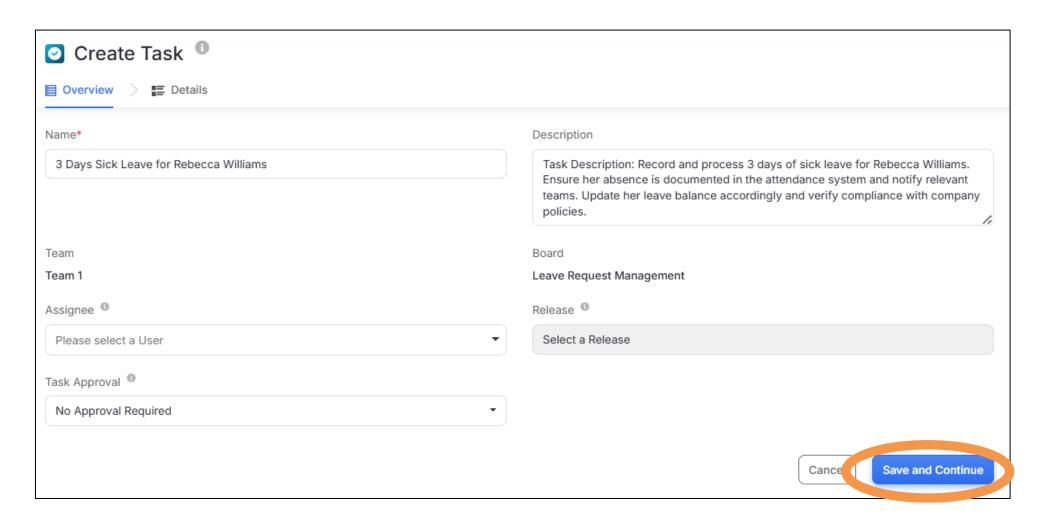
- After learning how to create Task Groups, let us now learn how to create Independent Tasks.
- Independent Tasks are not tied to any specific Task Group.
- Please click on the +Task button under the Request Initiation column. This is the first column in our Kanban Board.





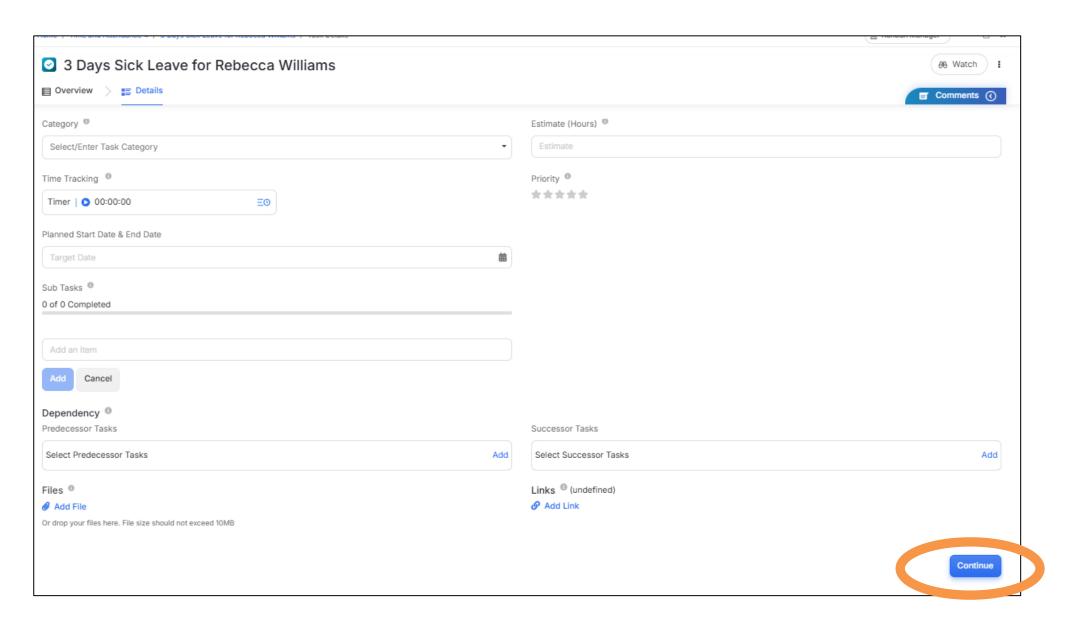
- This opens the Create Task menu.
- Let's assume that Rebecca Williams has applied for a 3-day sick leave through email.
 - Under Name, type "3-Day Sick Leave for Rebecca Williams."
 - Then click "Generate with Vabro Genie Al" under Description.
- Vabro Genie Al will generate a description for the leave, which you can easily edit to suit your requirements.





- Notice that the Create Task menu has some additional, optional fields such as:
 - Assignee Allows you to assign a specific person to work on the task.
 - Task Approval Lets you specify whether the task requires approval from a Product Owner or Kanban Manager before completion.
 - Release Used if the task is part of a particular release.
- For now, we will skip these fields. Please click the "Save and Continue" button at the bottom right of the screen.



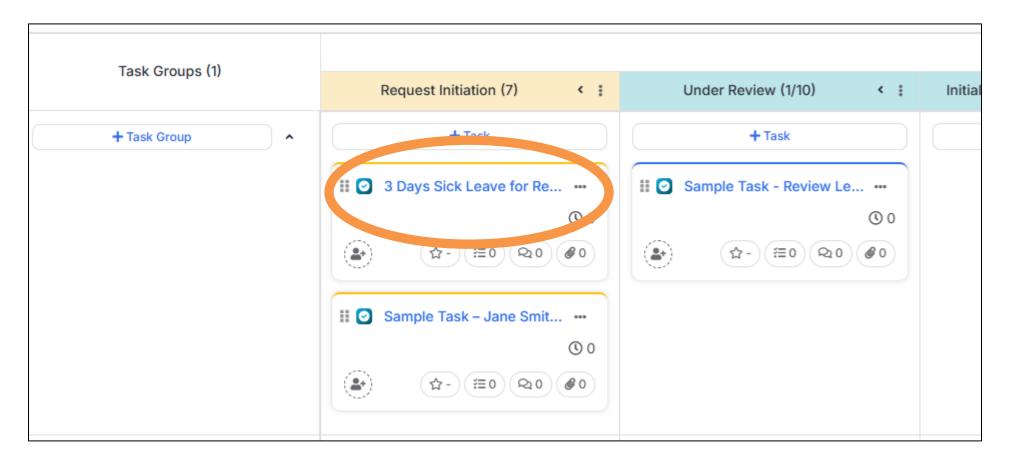


This opens the **Details** tab of the **Create Task** menu. You will notice that for each task, you can optionally set up **Category**, **Estimate**, **Time Tracking**, **Planned Start and End Dates**, **Sub- Tasks** (which can serve as a checklist of items to complete the task), and **Dependency**. You can also add files or links to the task.

 For now, we will skip all these optional fields. Please click the "Continue" button at the bottom right of the screen.

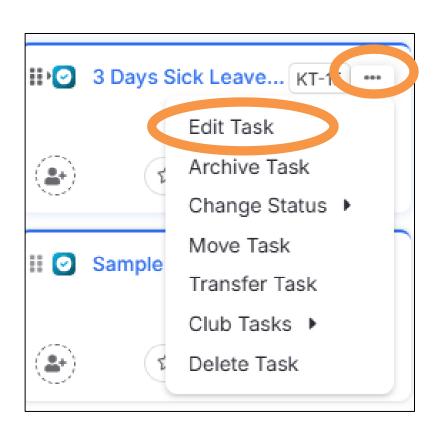






- This brings you back to the Kanban Board.
- You can see that "3 days sick leave for Rebecca Williams" has been assigned as a new task under "Request Initiation" process.
- So, you have now learnt how to create Tasks in Kanban!

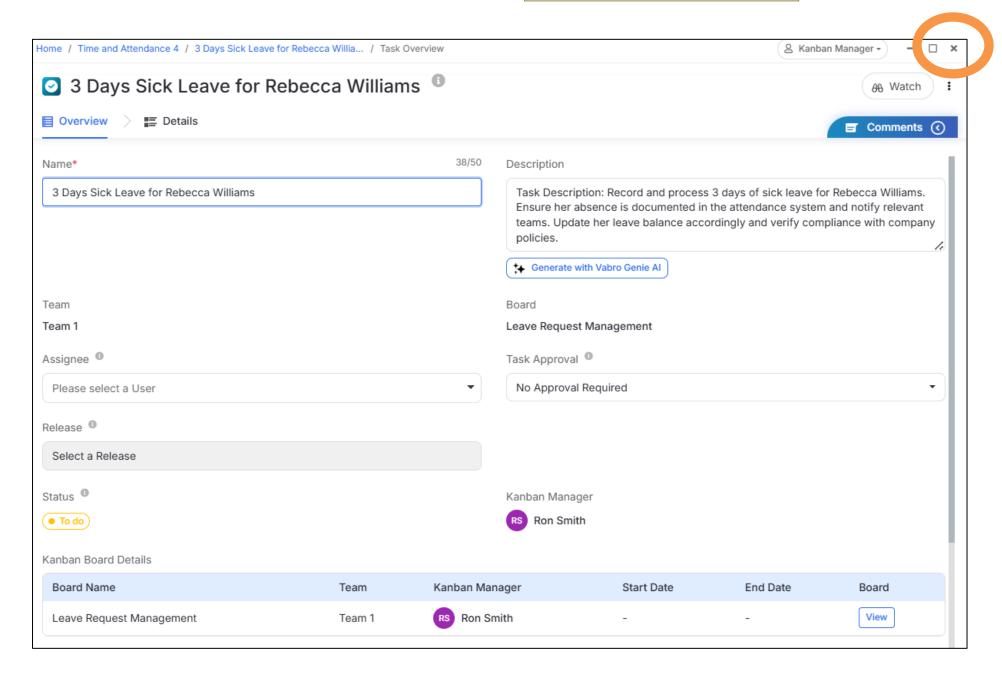




- Let us now review some popular actions available with 'Tasks.'
- Please click on the three dots next to the Task name.
- This will open a menu—click on the first option, 'Edit Task.'"



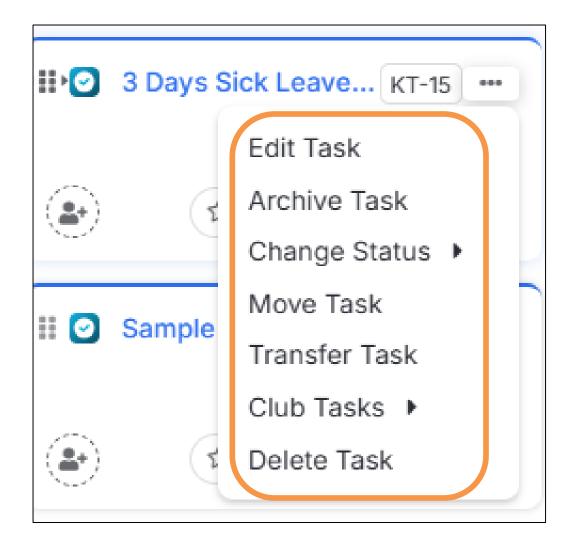




- This opens the same window you used for 'Create Task.'
- You can use it to edit any task property.
- However, we will skip this for now.
 Please close the window by clicking the cross icon at the top-right corner.





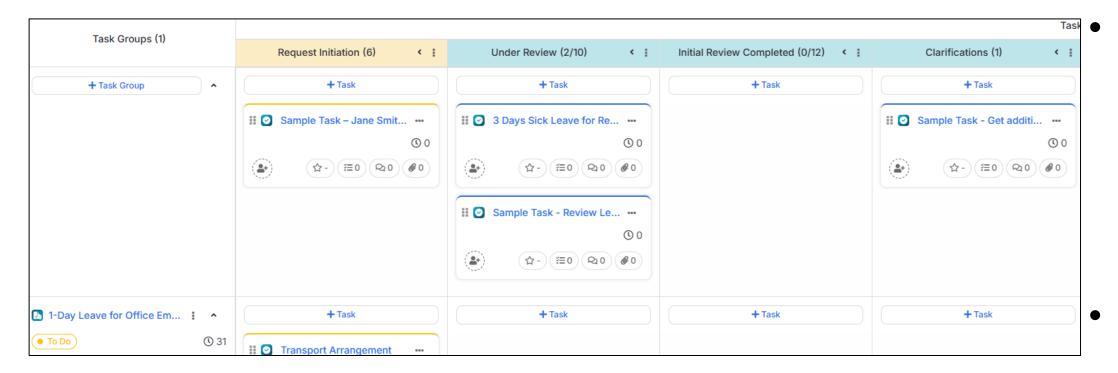


Some other popular task actions include:

- Archive: Archive tasks so they no longer appear on the Kanban Board.
- Change Status: Move tasks to different columns on the Kanban Board.
- Move Task: Move tasks from one task group to another.
- Transfer Task: Transfer tasks from one Kanban Board to another.
- Club Tasks: Allows to club similar tasks e.g. repeated queries from customers.
- Delete Task: Delete tasks entirely.

Note: You can try out these features later—we will not practice them in this demo





Vabro.ai makes it very easy to drag and drop tasks into any column in the Kanban board.

Please try this out on your own for the next 30 seconds—simply drag and drop tasks into different columns on the Kanban Board.

3. Practical Implementation of Kanban with Al WKanbanstudy Using Vabro.ai

Steps to prepare for the Vabro.ai demo (10 minutes)



Setting up your Vabro.ai account (5 minutes)



Using AI Template to Set Up an HR Workflow (5 minutes)



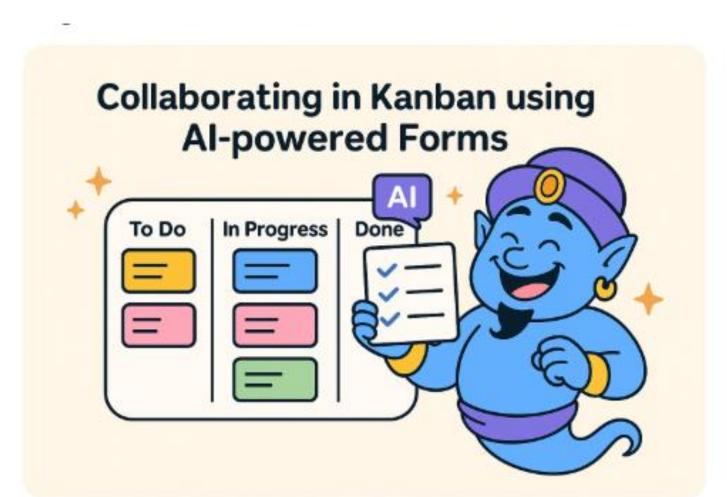
Understanding the Kanban Board (20 minutes)



Exploring Task Groups and Tasks (20 minutes) 5.



- 6. Collaborating using Al-powered Forms (25 minutes)
- Kanban in Action A Complete Process Walkthrough (19 minutes)
- 150+ Features Bigger and Better (1 minute)
- Create entire process with your Al prompt (10 minutes)



3.6 Collaborating using Al-powered Forms



What are Forms?

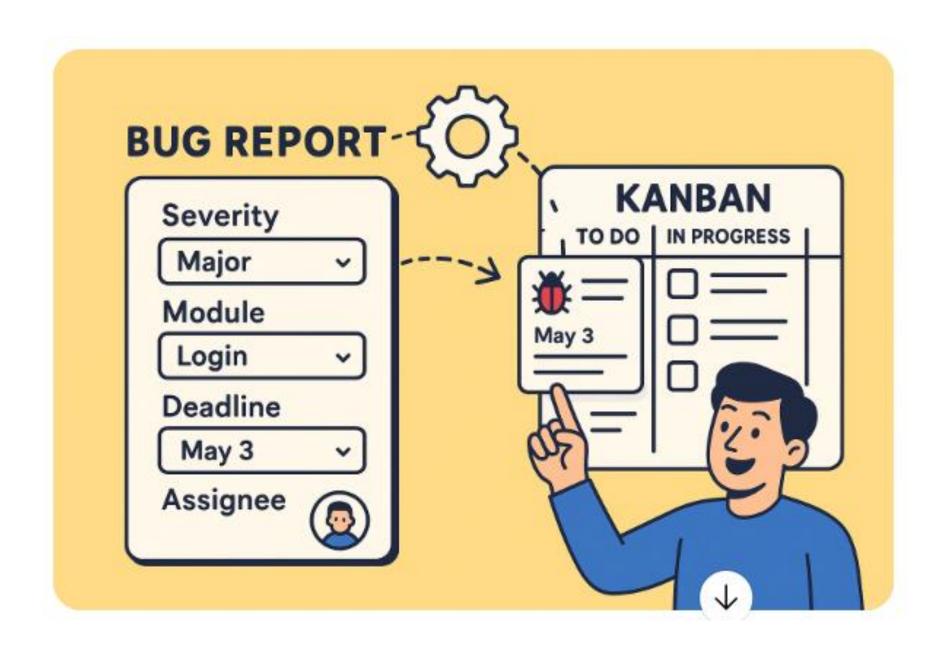
• Forms are structured documents—digital or physical—designed to collect, organize, and submit information in a standardized format.

 Typically consist of labeled fields such as text boxes, checkboxes, dropdowns, or radio buttons, allowing users to input data easily and consistently.



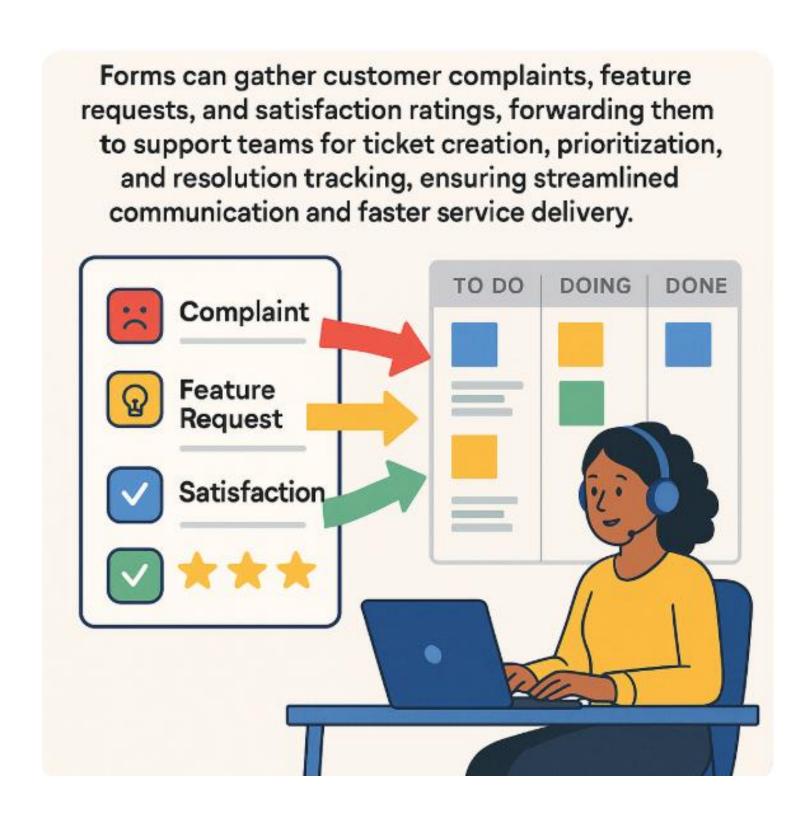
Help Set up Kanban tasks in a predefined format.

 In IT, forms auto-create Kanban tasks for bug fixes with predefined fields like severity, module, deadline, and assignee, ensuring standardization, faster triaging, and streamlined workflow management.,





- Collect inputs from customers and stakeholders, both inside and outside the organization.
- Communicate with people not using the Kanban workflow, such as through website forms, emails, or messages.





Fully configure workflows, as forms
 support most data types including text,
 numbers, attachments, dates, dropdowns,
 and more.

 Configure and automate responses to external stakeholders using customizable Al-powered headers, footers, automated messages, and other settings.





 Automate stakeholder notifications as tasks move through different stages in a Kanban workflow.

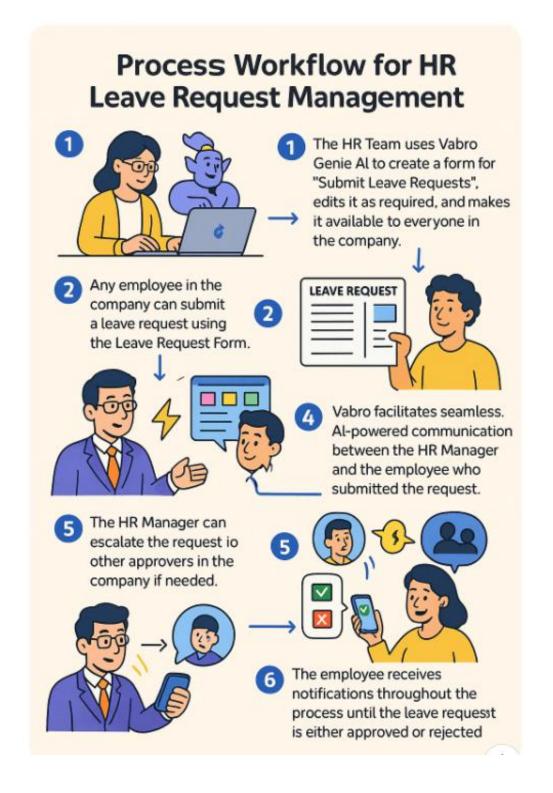
 Leverage Al-powered messaging and templates to simplify and standardize communication. In the HR Leave Request Workflow, Forms trigger automatic notifications to managers and form submitters, as leave requests progress, using Al-powered templates for consistent, standardized, and timely communication at each stage.

SUBMITTED IN REVIEW APPROVED



- Gather feedback and ratings from external stakeholders about the performance of the Kanban workflow (e.g., customer support feedback).
- Generate comprehensive Al-powered reports to track multiple workflows and data points.

In Finance workflows, forms can collect expense claims, budget approvals, and invoice data across departments, automatically generating comprehensive monthly reports on spending trends, variances, and cash flow for management review.











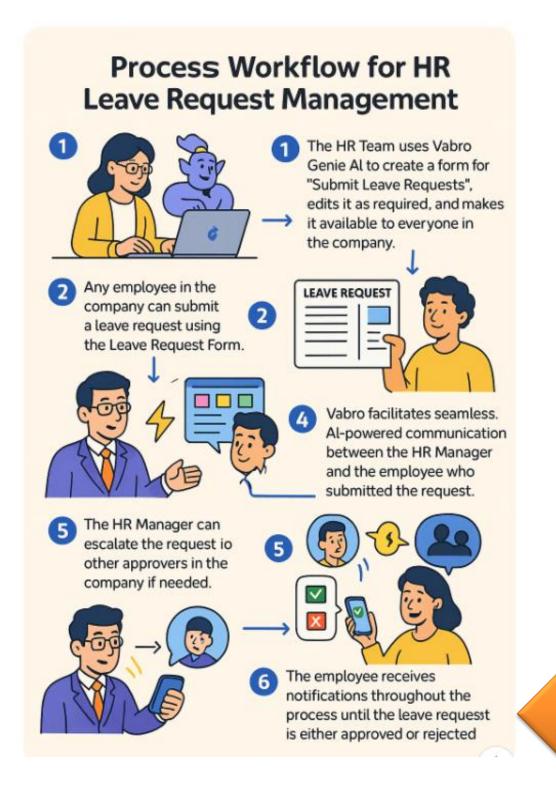






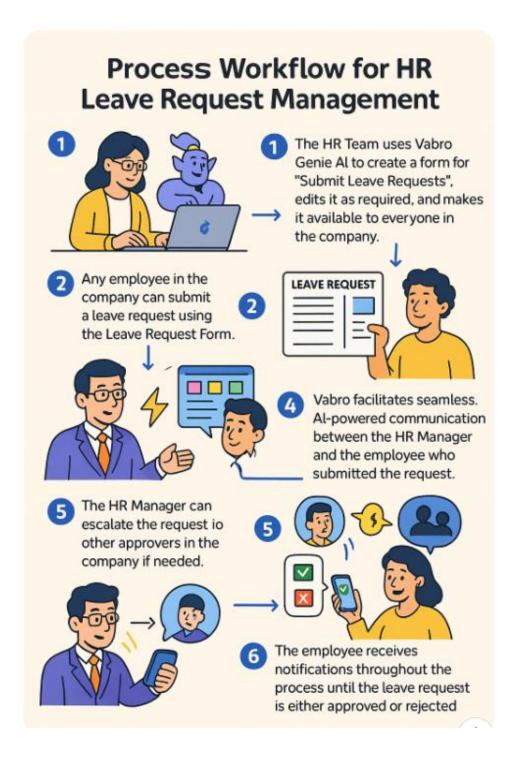










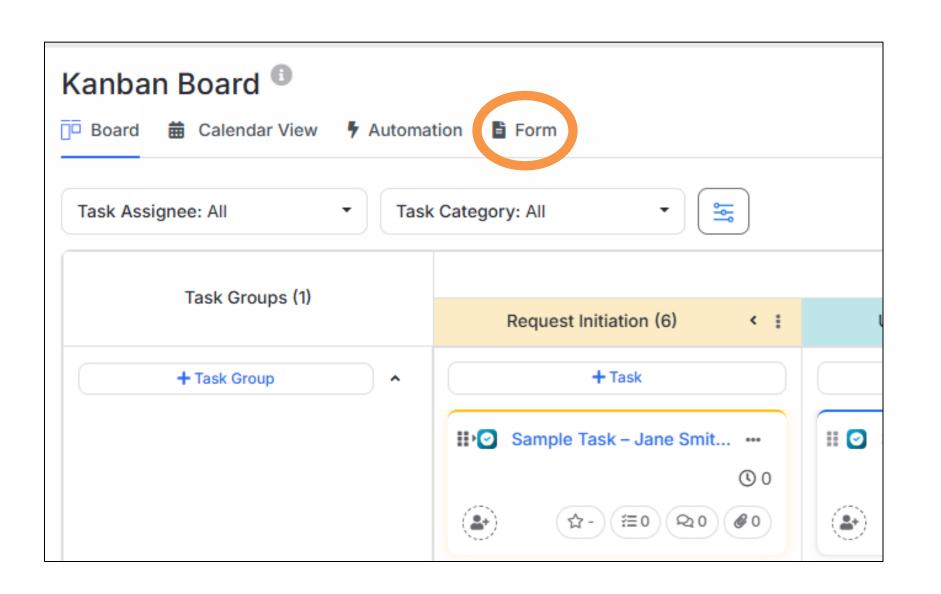


The entire HR Leave Request workflow shown here has already been set up for you by Vabro Genie AI!



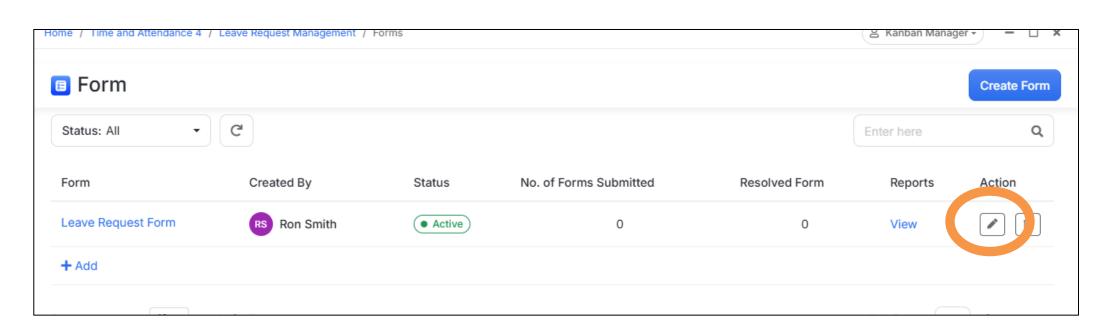
For any workflow available in Vabro Genie AI, or created by you through an Al prompt, Vabro Genle Al uses Al and industry best practices not only to generate the Kanban Board and sample tasks, but also to create the relevant forms and set up the entire workflow — all of which you can edit as needed! No other tool, such as Jira, Asana, ClickUp, Wrike, Smartsheet, or Monday, comes close to Vabro.ai in terms of AI capabilities and available features! In Progress To Do Done





- Let us now review and edit the form created by Vabro Genie Al for "Leave Request Management."
- Please click on the Form menu at the top of the Kanban Board.



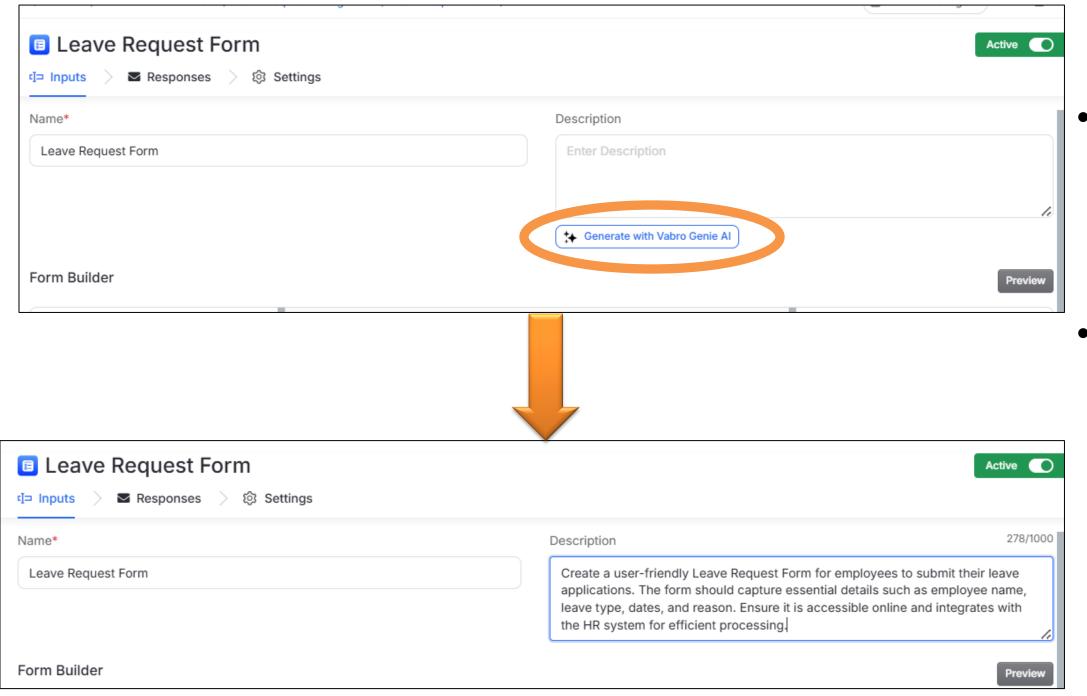


 This takes us to the Form menu, where you can see a form already created for "Leave Request Management."

 Please click the "Edit" button under the Action column to continue.



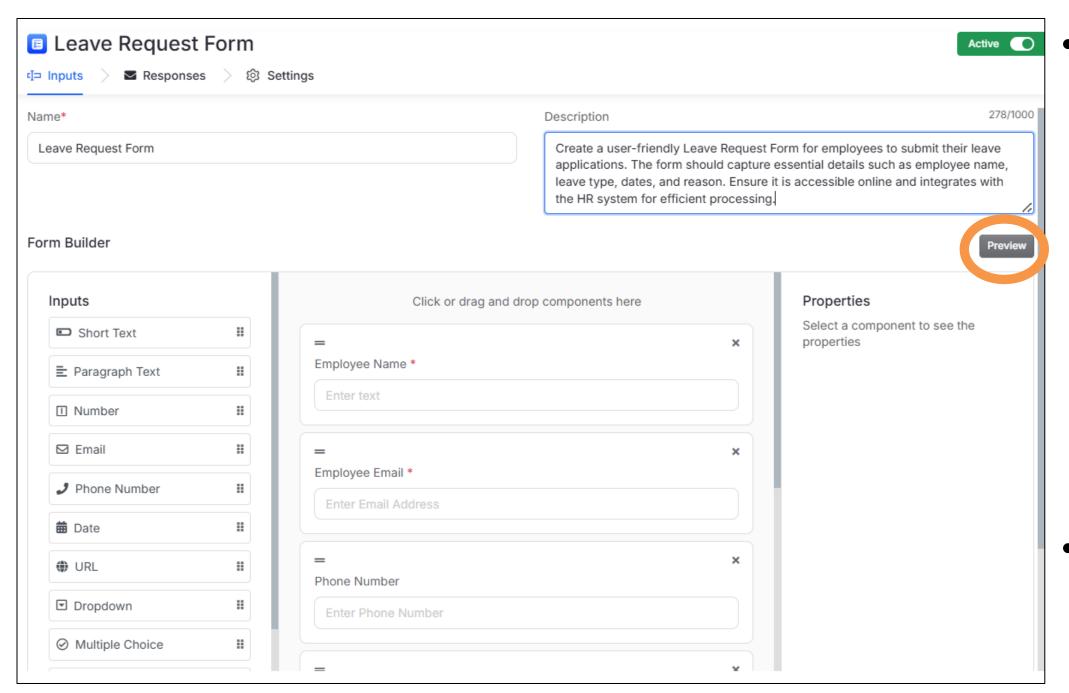




This now opens the Leave Request Form for you to edit.

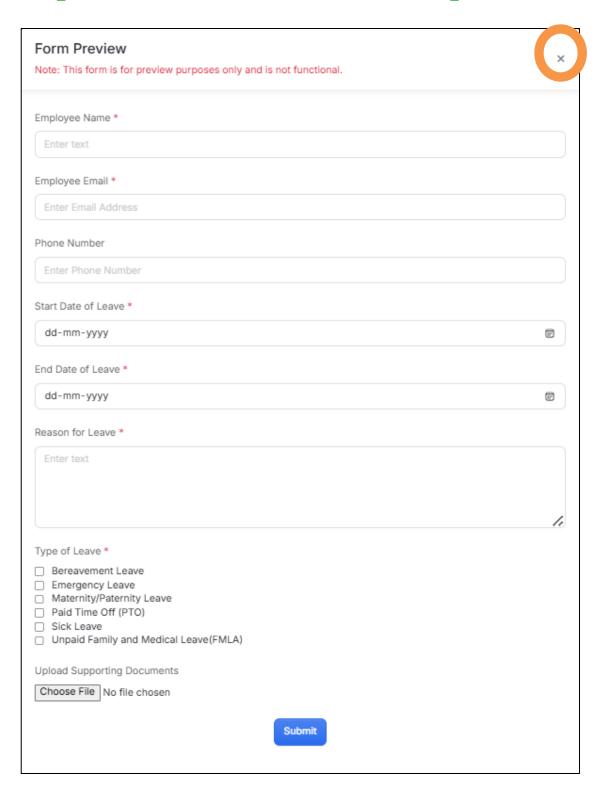
Below the Description field, please click the button "Generate with
 Vabro Genie Al" – this will create the description for the Leave
 Request Form. Please review it and edit if needed.





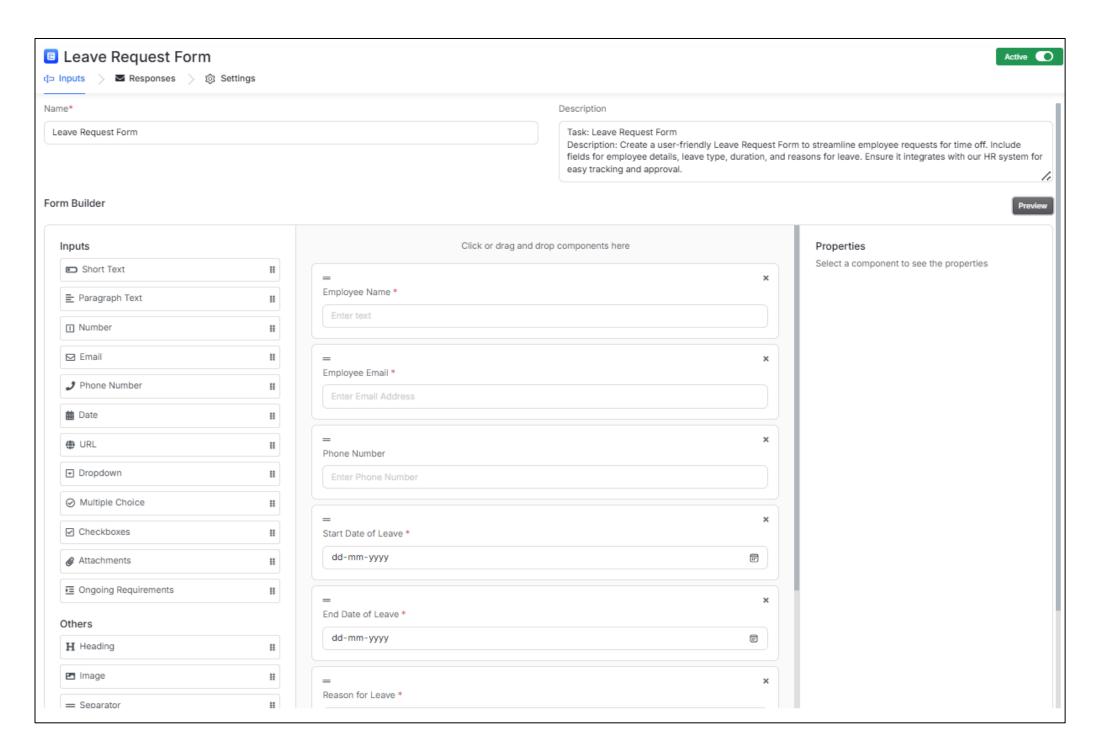
- Vabro Genie AI uses advanced AI capabilities to create the entire Leave Request Form, which can then be used by any employee in the company to submit a leave request to the HR Kanban Board.
- Please click the "**Preview**" button to see how the form created by Vabro Genie Al looks.





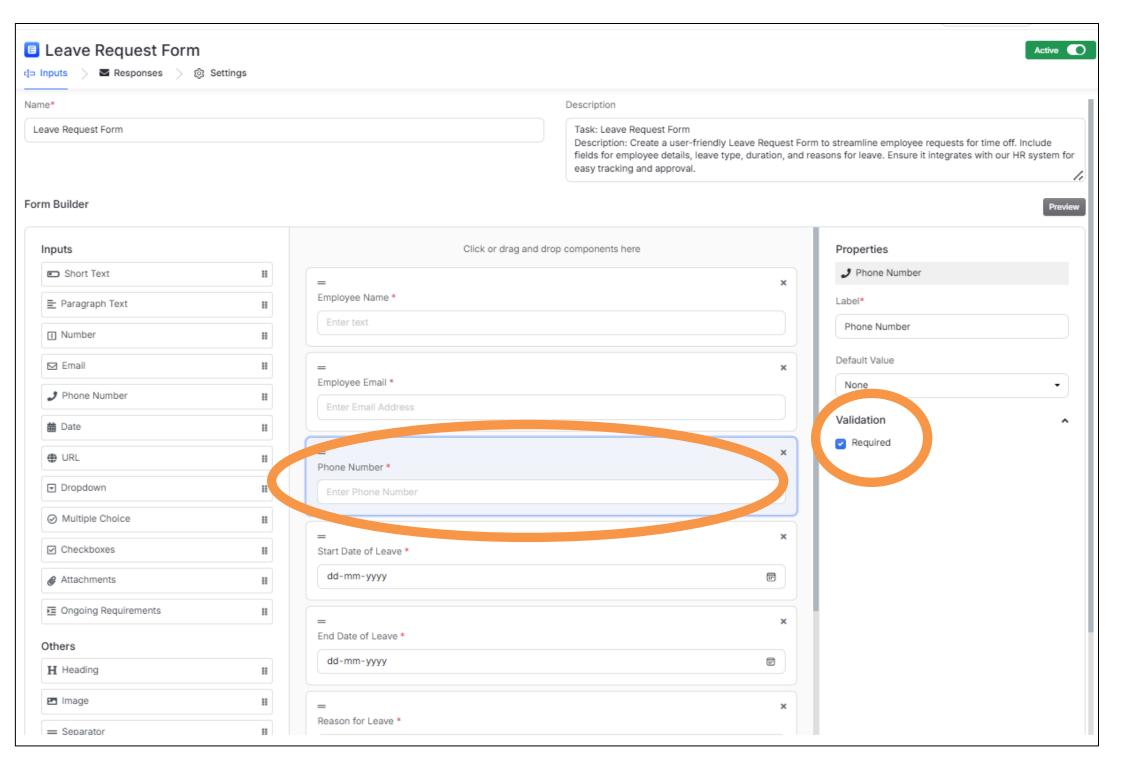
- This takes us to the Form Preview screen, where we can check the form created by Vabro Genie AI for "Leave Request Management."
- Please spend 30 seconds reviewing the form.
 Does it resemble the leave request form used in your company? You can edit any of the fields in the next step.
- Then, click the "Close" icon
 at the top-right corner of the screen to exit the
 preview.





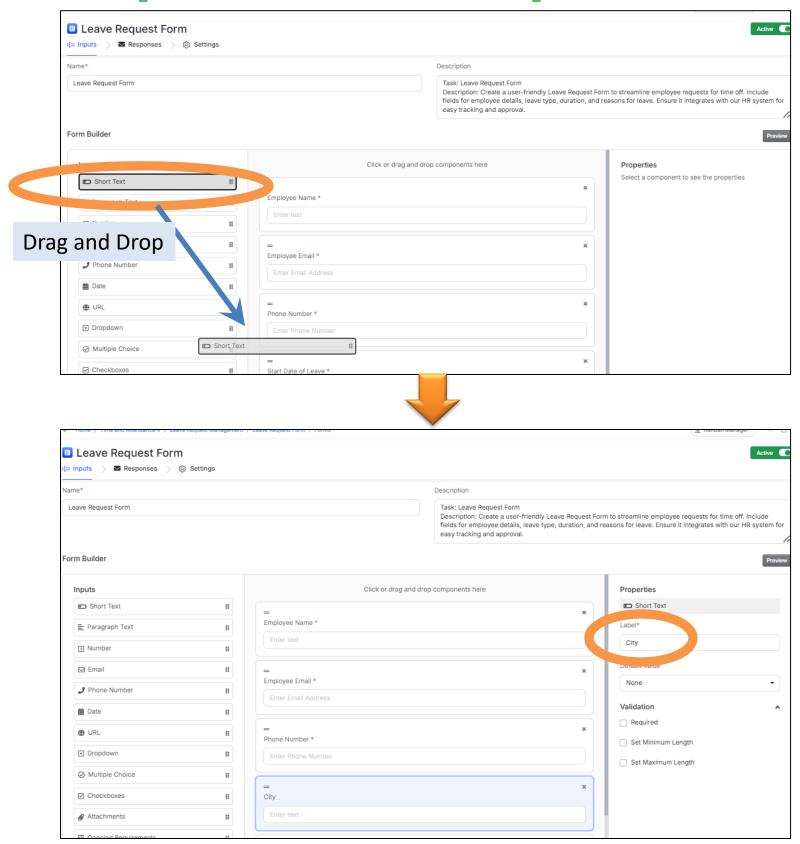
- This takes us to a full-featured, powerful Form Editor, where you can add or edit any fields in the form.
- The left-hand menu shows that the form supports multiple field types, including text, number, email, date, dropdowns, attachments, and more—everything your company needs to create a powerful form for collaboration between your Kanban Board and other teams.
- Please review for 30 seconds.





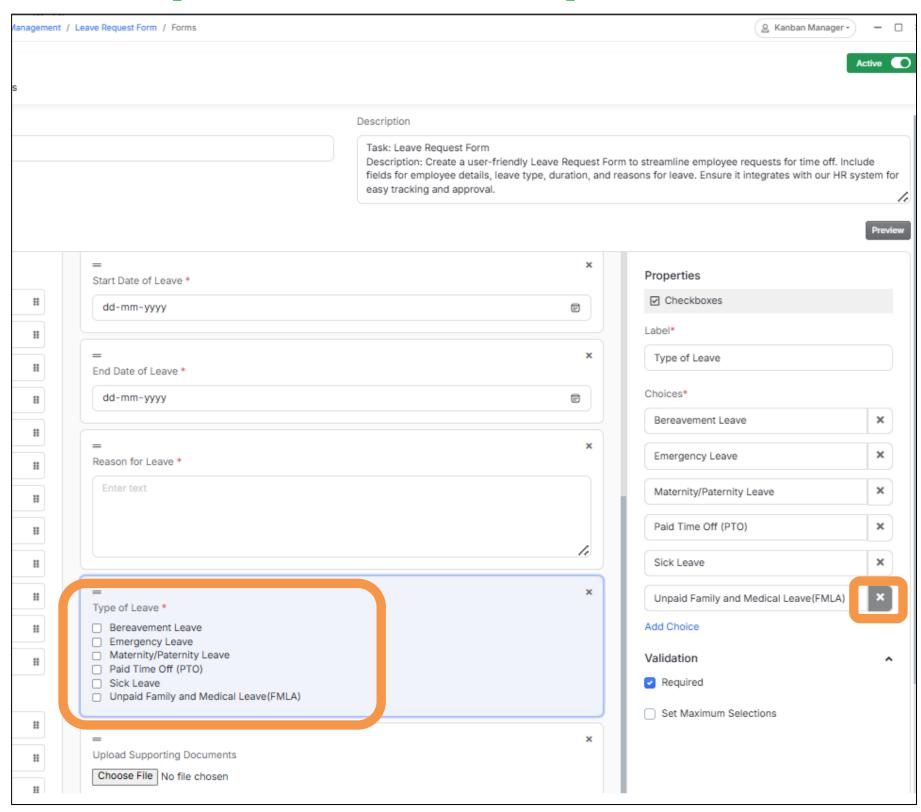
- Let's try a few edits in the Leave Request Form.
- The phone number is currently a non-mandatory field. Let's make it mandatory.
- Click on the Phone Number field in the center. This opens the properties menu on the right side for this field.
- Select the checkbox under
 Validation—this makes the phone number a required or mandatory field.





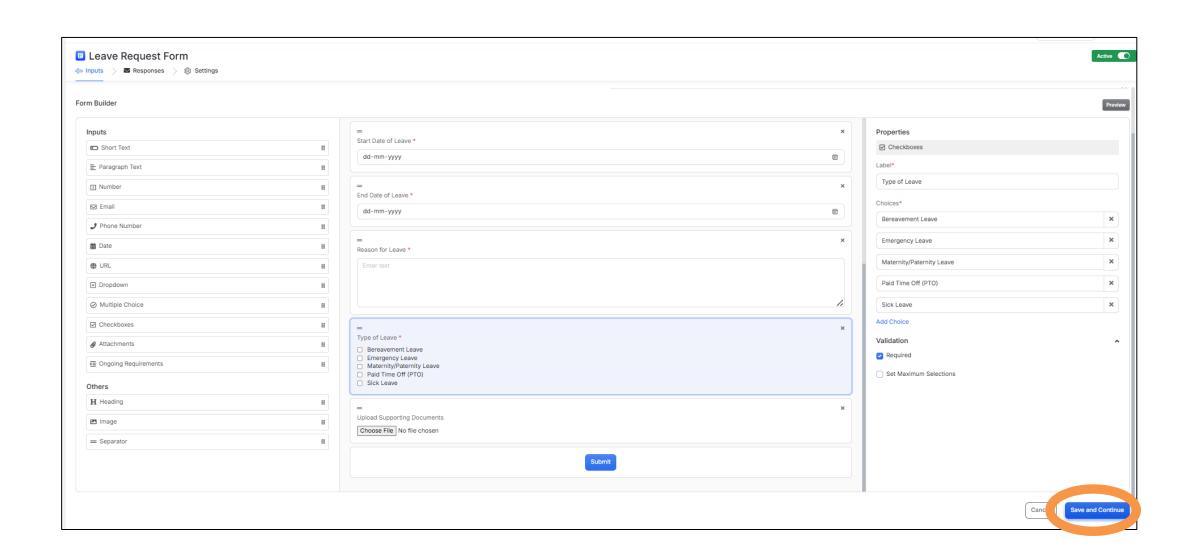
- Now, let's assume we want to add a new field called City under the Phone Number field.
- This is simple: click the **Short Text** button on the left menu bar and drag it below the **Phone Number** field.
- You will then see the associated properties for this field on the right. Under Label, type "City."
- You have now created a field for City in the form.





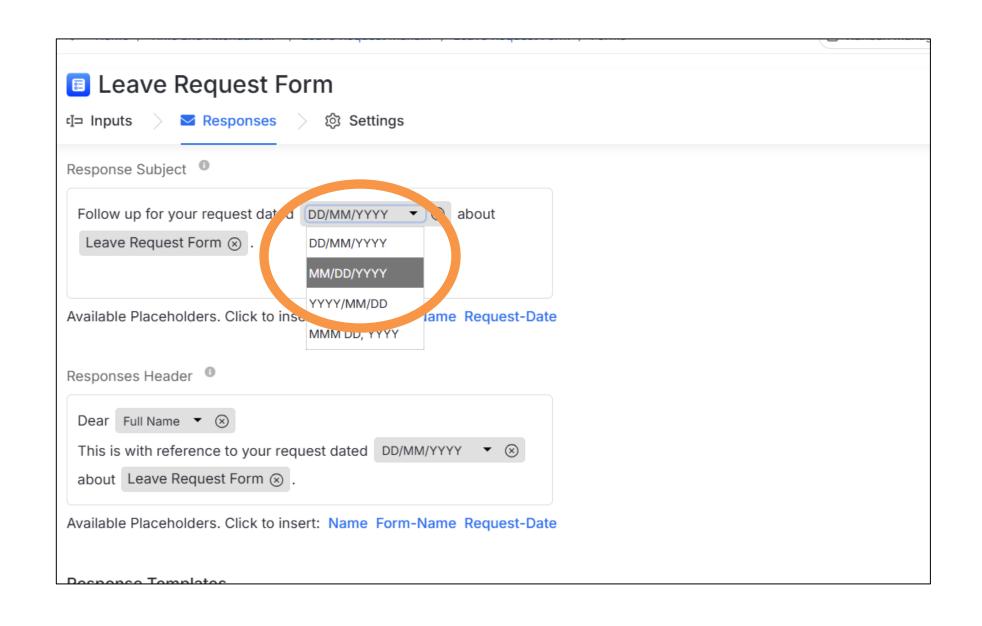
- Let's now edit the dropdown list for Type of Leave to remove Unpaid Family and Medical Leave from the options.
- Select the **Type of Leave** dropdown in the center menu.
- The properties for this dropdown will appear on the right.
- For the last option, Unpaid Family and Medical Leave, click the cross icon on the right to remove it from the dropdown.





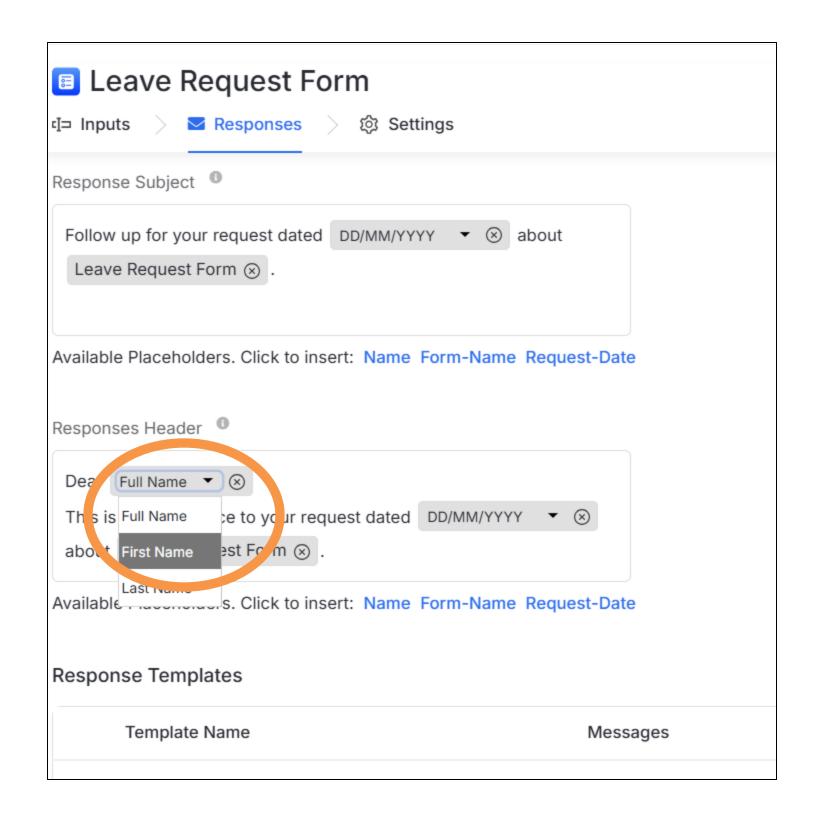
- You now have an idea of how the powerful Form Editor in Vabro allows you to create and customize any form!
- Now, click the "Save and Continue" button at the bottom right of the screen.





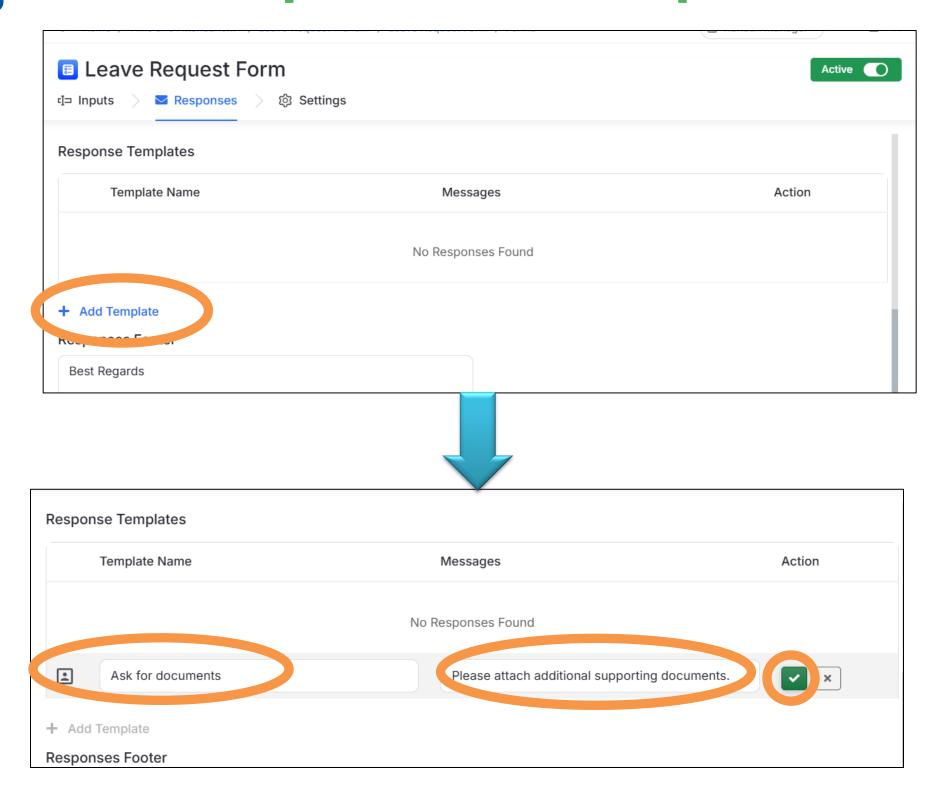
- This takes you to the "Responses" section of the Leave Request Form, where you can automate how you respond to the individuals submitting the form, hereafter referred to as "Form Submitters."
- In this section, you can set up and automate the Subject, Header, and Footer of your messages, as well as create templates to handle standard queries quickly.
- Let's see how this works: In the Header section, change the date format to MM/DD/YYYY by selecting it from the available dropdown menu.





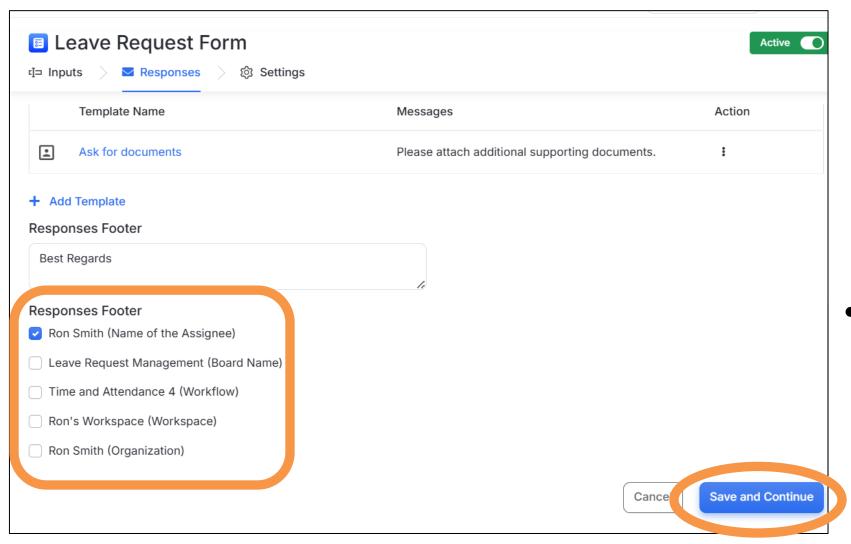
- Next, in the "Responses Header" section, you can edit how you address the Form Submitters.
- For example, you can change "Full Name" to "First Name" by selecting the appropriate option from the dropdown menu, as shown here. Your messages will then address the Form Submitter as "Dear First Name."





- As part of automating responses to Form Submitters, Vabro.ai allows you to create templates that can be used for answering standard queries.
- To begin, click +Add Template to create a new template.
- Next, in the ID field, enter "Ask for Documents" as the Template ID.
- In the Messages section, add "Please submit additional supporting documents".
- Finally, click the checkmark icon to save the template.

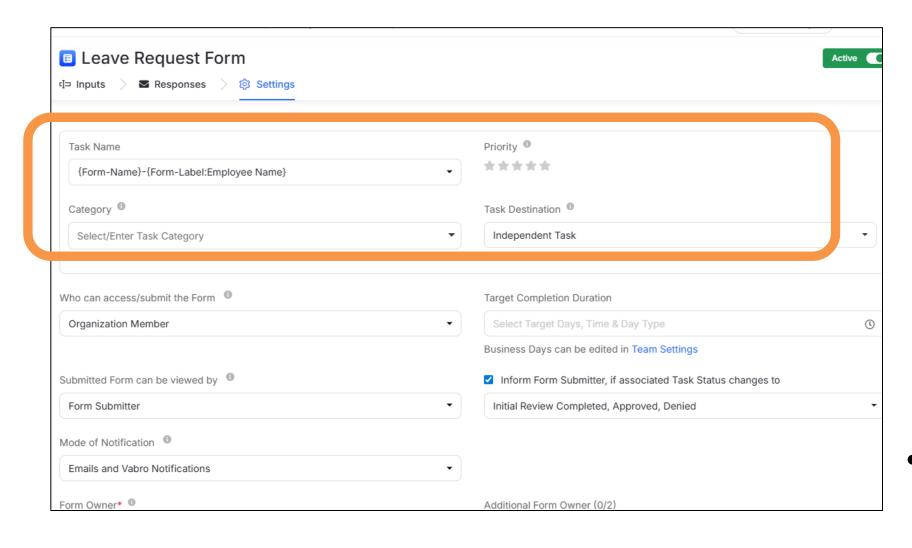




- The next step is to set up the **Responses Footer**—this is the footer that Form Submitters will see when you send any message to them. For the Responses Footer, you can add any message and then select the person or department whose name will appear in the footer.
- In our case, let's select the first option (Name of the Assignee), where Assignee refers to the person working on the specific task in the Kanban Board. The Responses Footer for our form will then be:
 - Best Regards, Name of Assignee
- Finally, click **Save and Continue** to proceed to the next step.

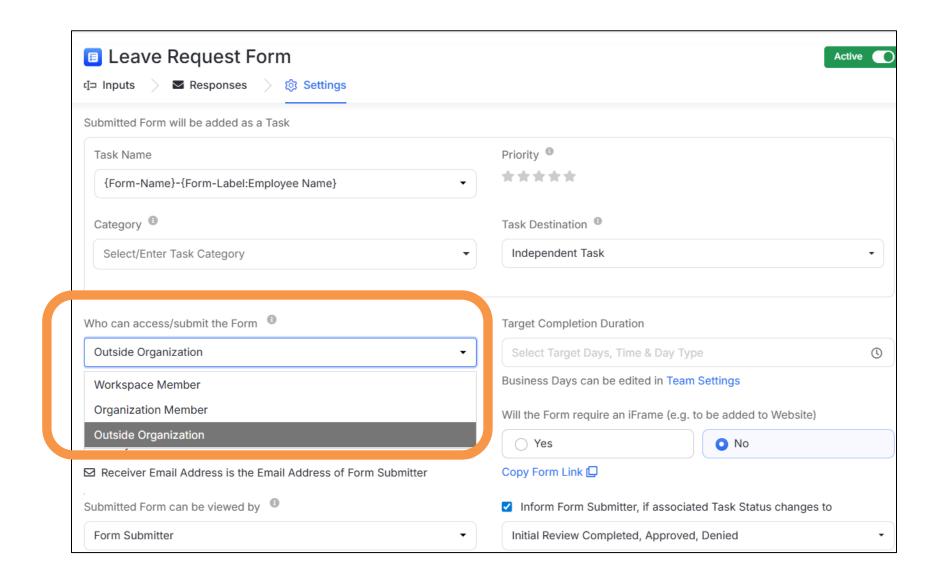






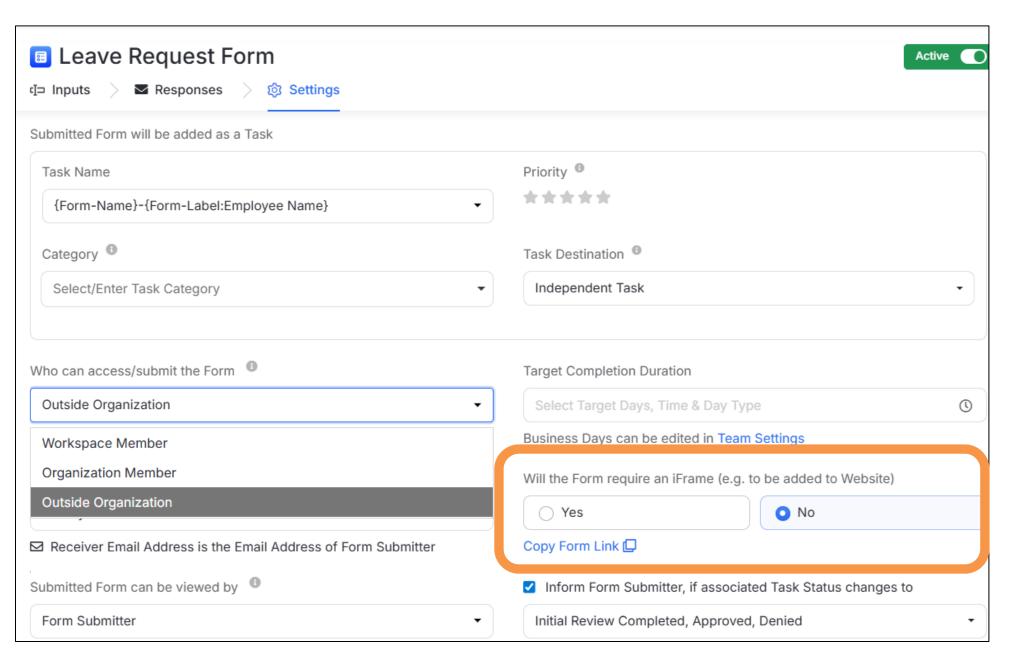
- This gets us to the **Settings** menu of the Form.
 These are some of the settings note that you can edit them later:
 - Task Name: This shows the name automatically assigned to the task.
 - Priority: This allows you to set the importance level for the task.
 - Category: This field helps organize tasks by grouping similar ones under a common label.
 - Task Destination: This specifies whether the task stands alone or is linked to a Task Group.
- Default settings are applied to all these we will not change them now.





- The next step sets up who can access and submit the form — this form will then be added as a task in the Kanban Board.
- The options available are:
 - Workspace Member
 - Organization Member
 - Outside the Organization
- For this demo, let us select "Outside the Organization" — we assume that your company may have several contractors outside the organization who can submit leave requests to you.

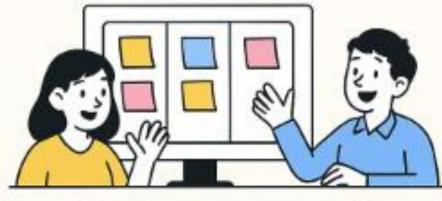




- When you select "Outside the Organization," Vabro.ai asks whether the form needs an iFrame (e.g., to be added to a website):
 - Yes: If you select this option,
 Vabro.ai will generate the code for you to embed the form directly on your website. Anyone using the form link on the site can then submit the form.
 - No: If you select "No," Vabro.ai will create a form link for you. Click on "Copy Form Link" to share the form via a message or email with anyone.
- For this demo, let us select "No"



Collaboration may be with stakeholders of different types:



Same Workspace – For example, one Kanban team collaboratively working on tasks within the same workflow.



Within the Organization but outside the Workspace – For example, employees submitting leave requests to an HR Leave Management Workflow or submitting reimbursement requests to a Finance Expense Management Workflow.





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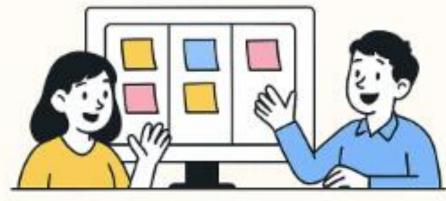
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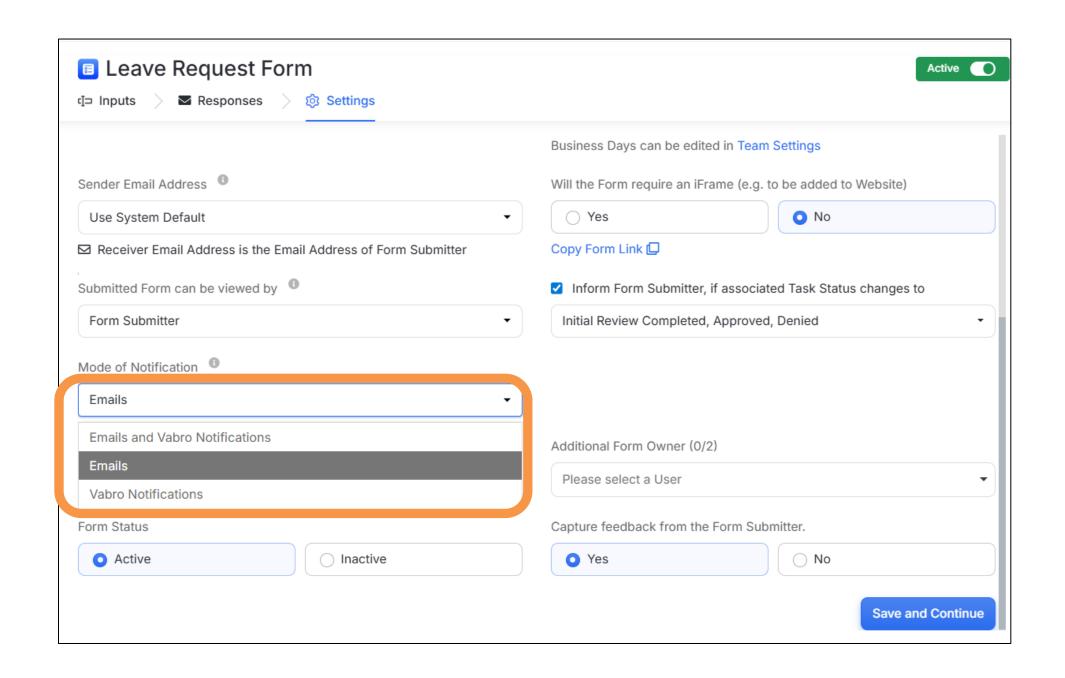


Vabro.ai is the only tool that easily enables collaboration with stakeholders of all types, including those outside the organization, and seamlessly integrates them with internal Kanban Roards



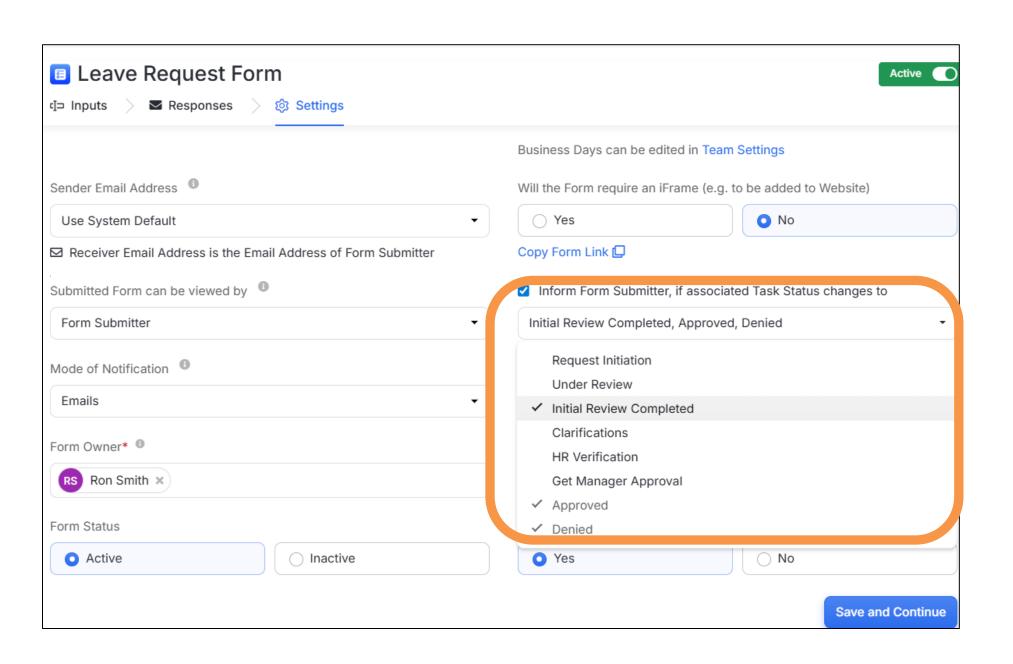
No other tool, such as Jira, Monday, ClickUp, Asana, or Wrike, offers this key functionality. With other tools, setting up collaboration with people in different departments, potential customers, or external stakeholders is very difficult—if not impossible.





- The next step is to set up how the form submitters can send information to the Kanban Board. The available options are:
 - Emails and Vabro Notifications
 - Emails
 - Vabro Notifications
- Since we are collaborating with people outside the organization, please select "Emails" — notifications work only if all collaborators are using Vabro.ai.



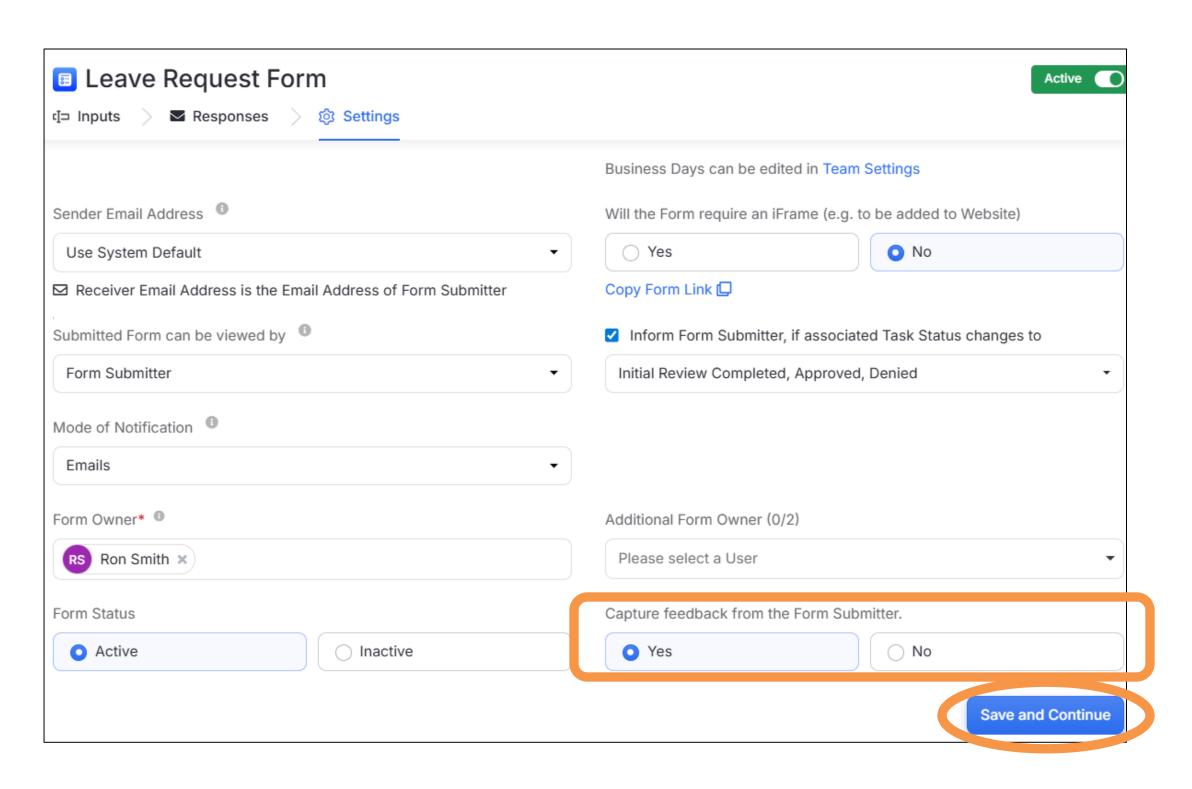


- With Vabro.ai, you can set up automated notifications for Form Submitters as tasks move through different columns in your Kanban Board and/or when tasks move to the Done columns.
- You can choose any column in the Kanban Board where Form Submitters will be notified when a task reaches that column.
- For example, in the HR workflow, the default notification is sent to Form Submitters when the task status changes to "Approved" or "Denied."
- Please also click on "Initial Review Completed."



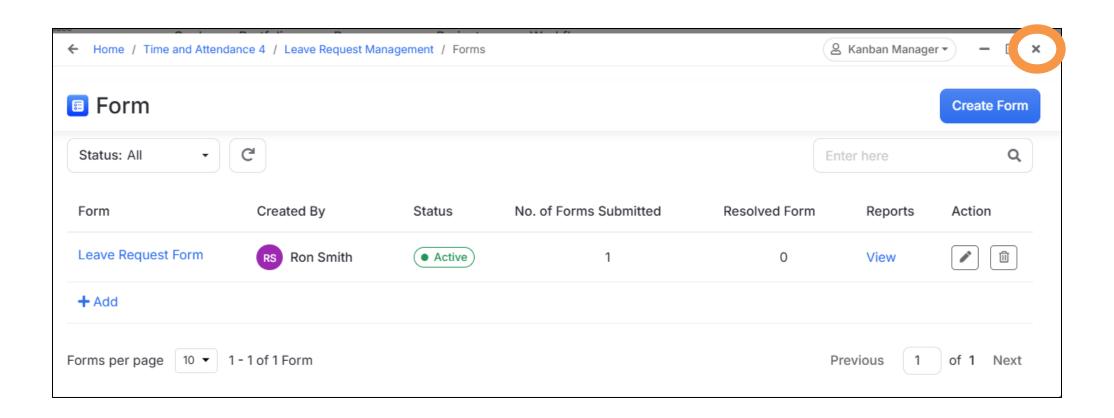






- Do you want others to give you feedback about how well you are managing your Kanban workflow?
- That is simple in Vabro.ai. In the field "Capture Feedback from Form Submitter," please click on "Yes" this will allow form submitters to rate their experience with your Kanban workflow on a scale of 1 to 5 stars.
- Next please click on "Save and Continue" button – your Form setup is now complete!





- This brings you back to the Form menu.
- Please click the Close Icon x in the top-right corner of the menu to close it and return to your Kanban Board.

3. Practical Implementation of Kanban with Al WKanbanstudy Using Vabro.ai





Setting up your Vabro.ai account (5 minutes)



Using AI Template to Set Up an HR Workflow (5 minutes)



Understanding the Kanban Board (20 minutes)





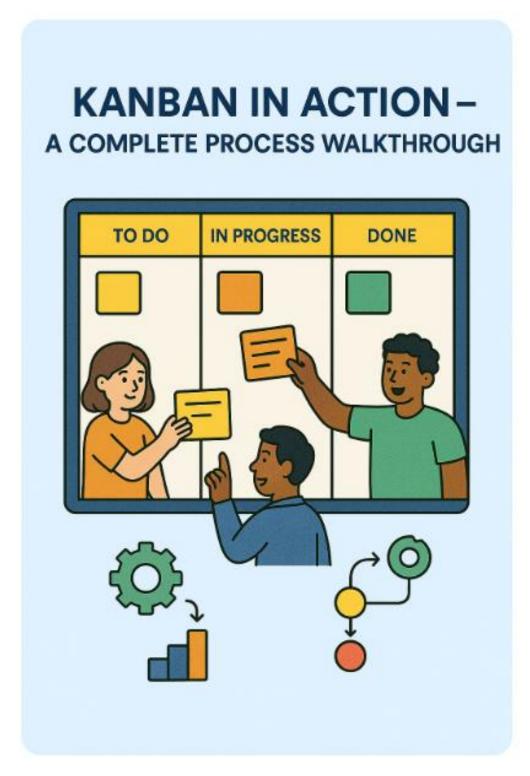
Exploring Task Groups and Tasks (20 minutes) 5.



Collaborating using Al-powered Forms (25 minutes)

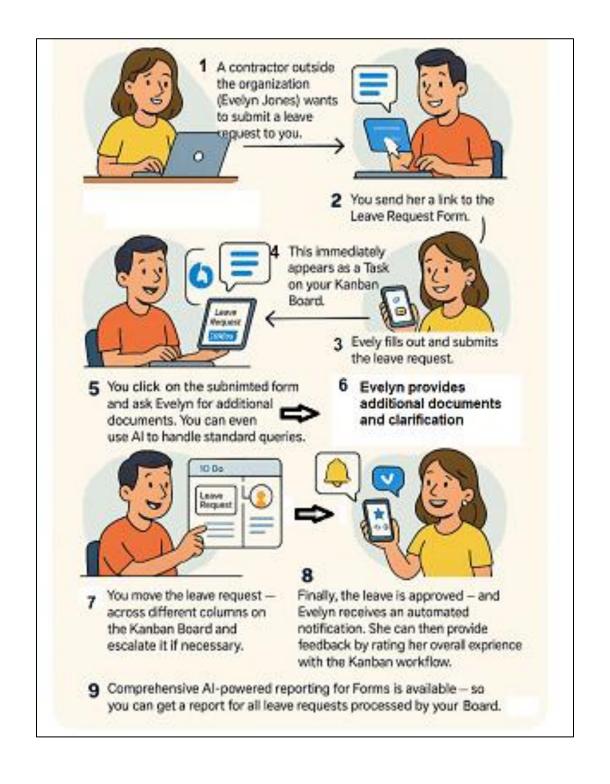


- Kanban in Action A Complete Process Walkthrough (19 minutes)
- 150+ Features Bigger and Better (1 minute)
- Create entire process with your Al prompt (10 minutes)



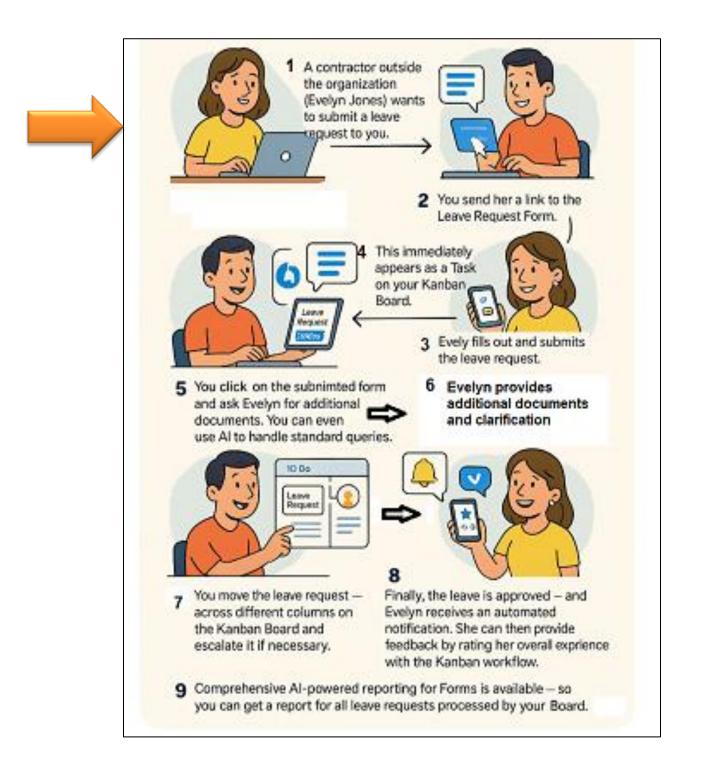
3.7 Kanban in Action – A Complete Process Wanbanstudy Walkthrough





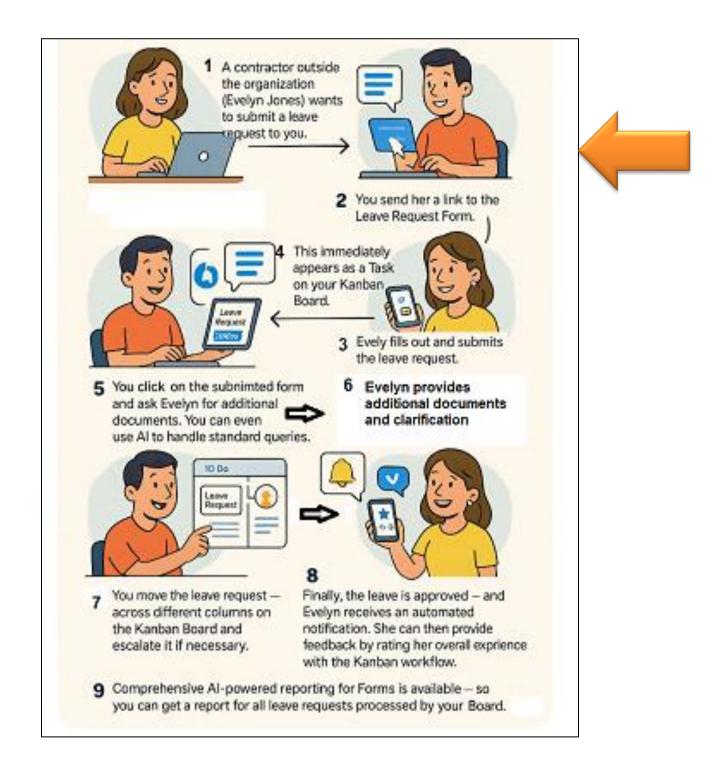
Walkthrough



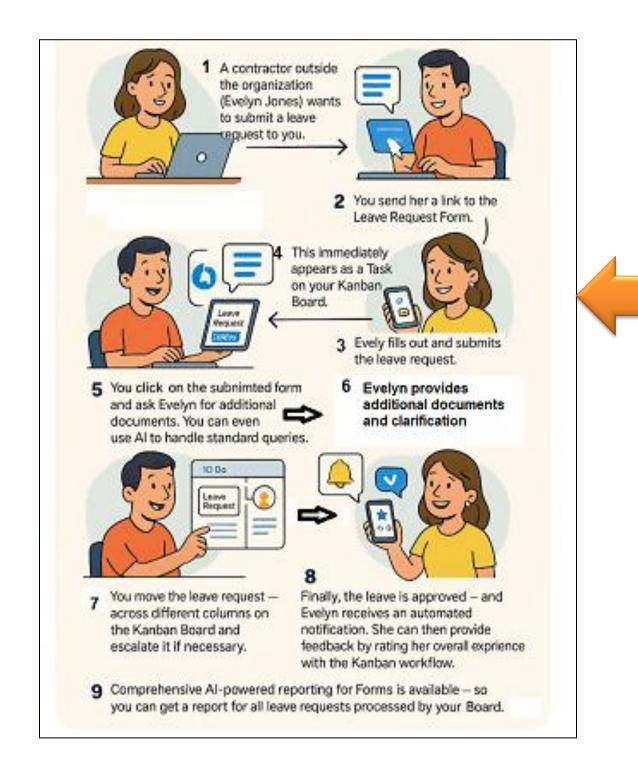


3.7 Kanban in Action – A Complete Process Wanbanstudy Walkthrough

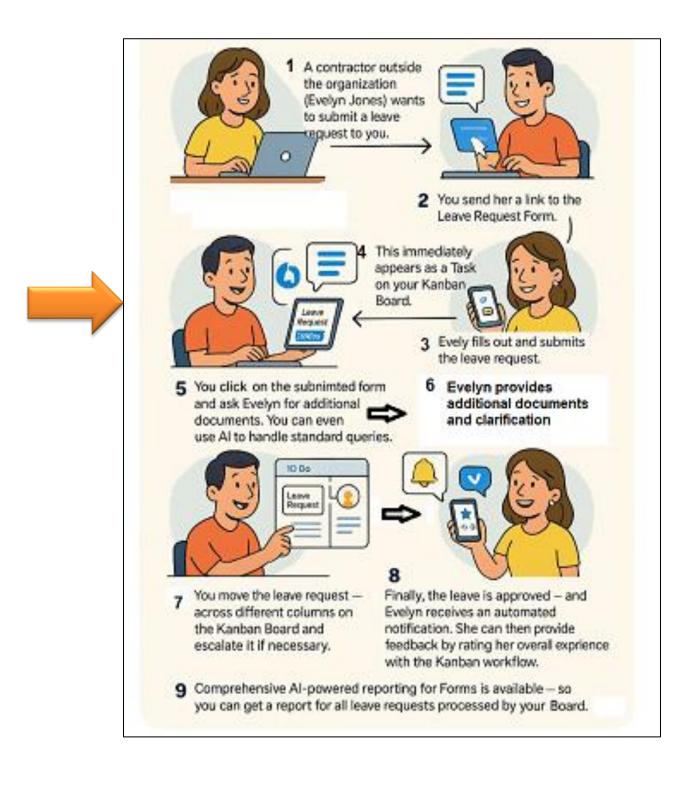




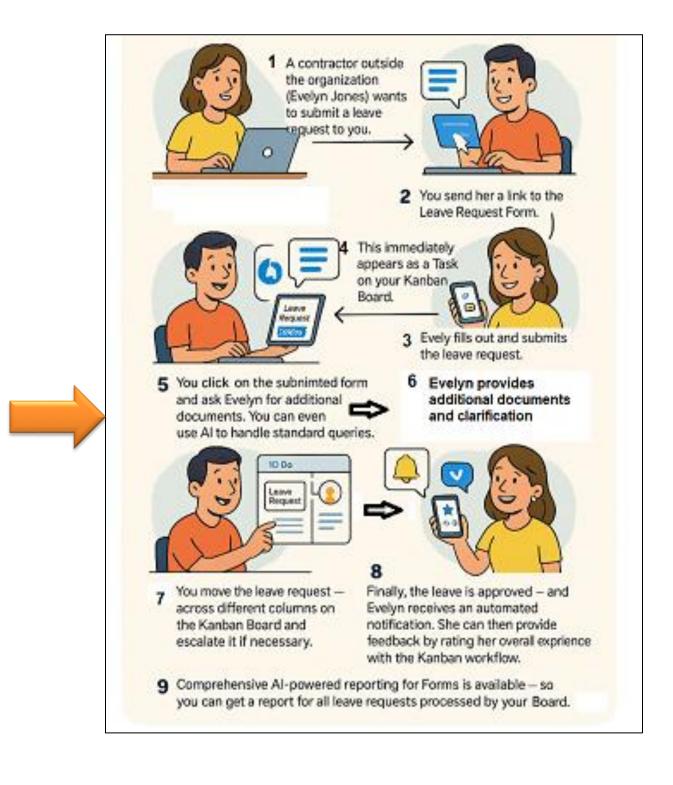




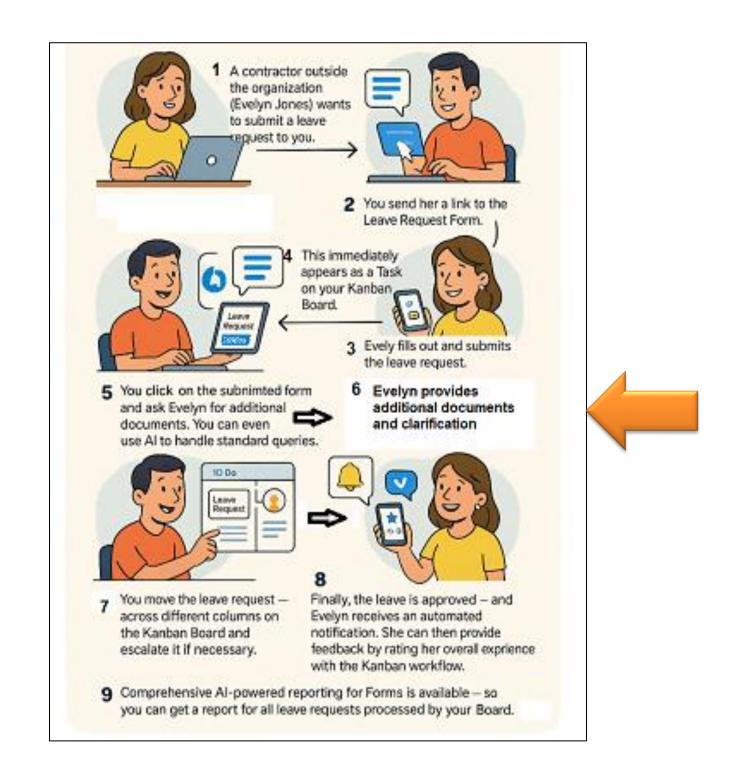




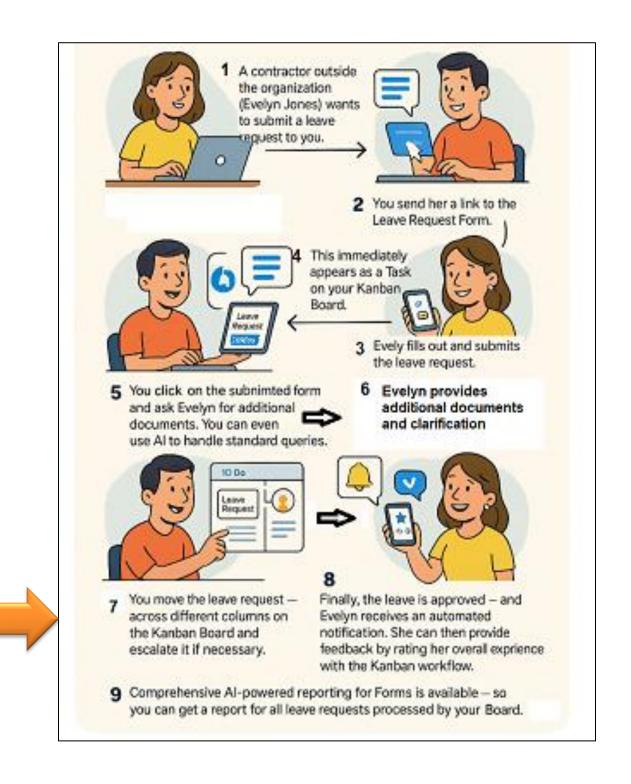




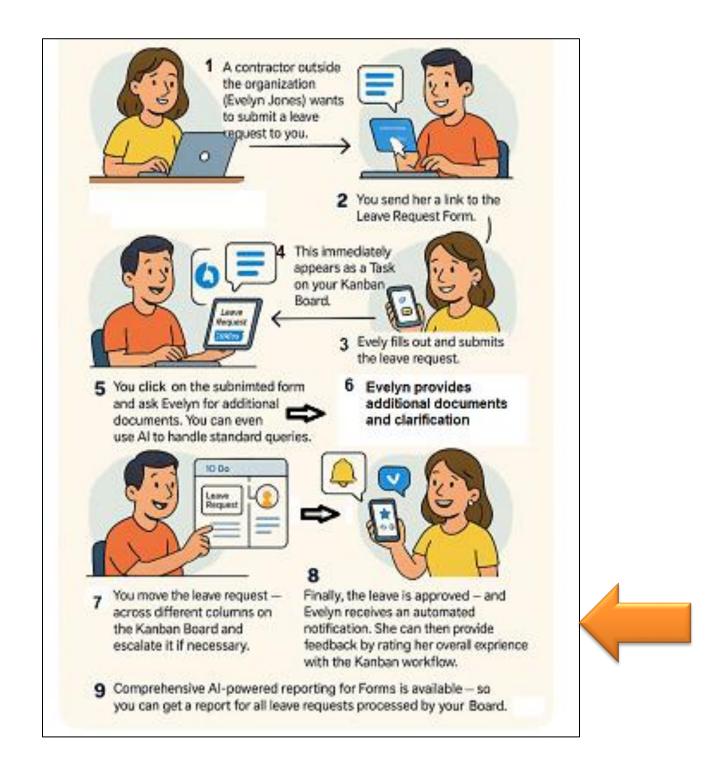




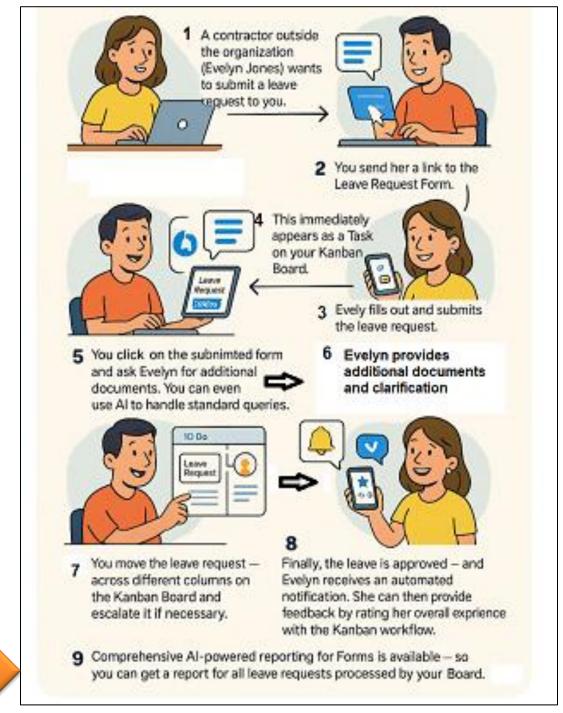






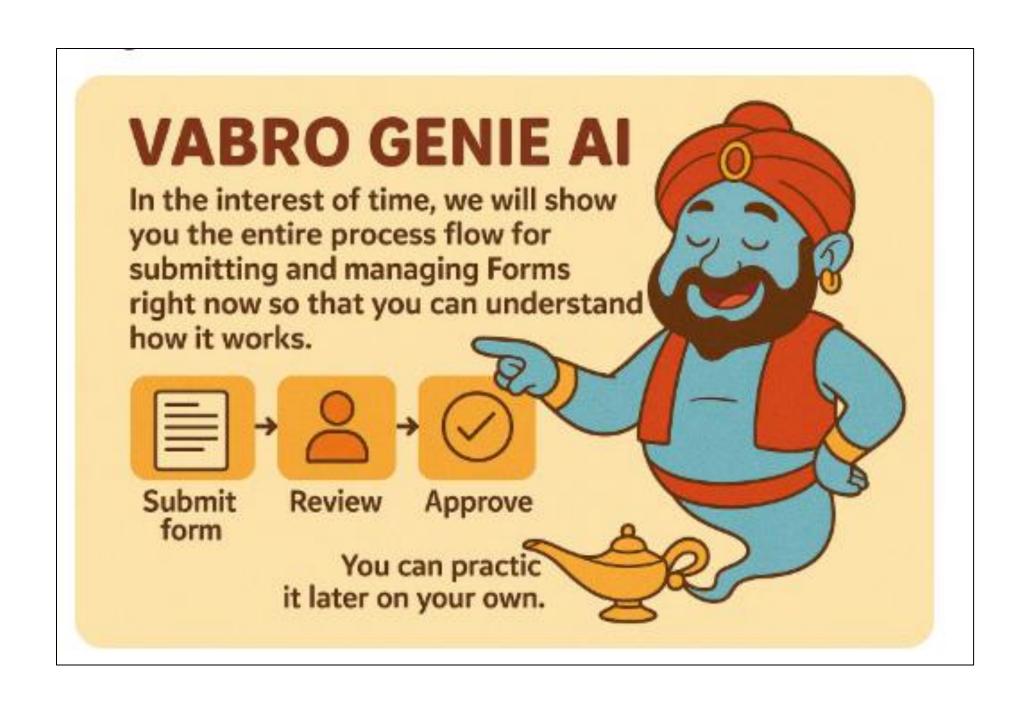




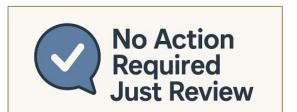


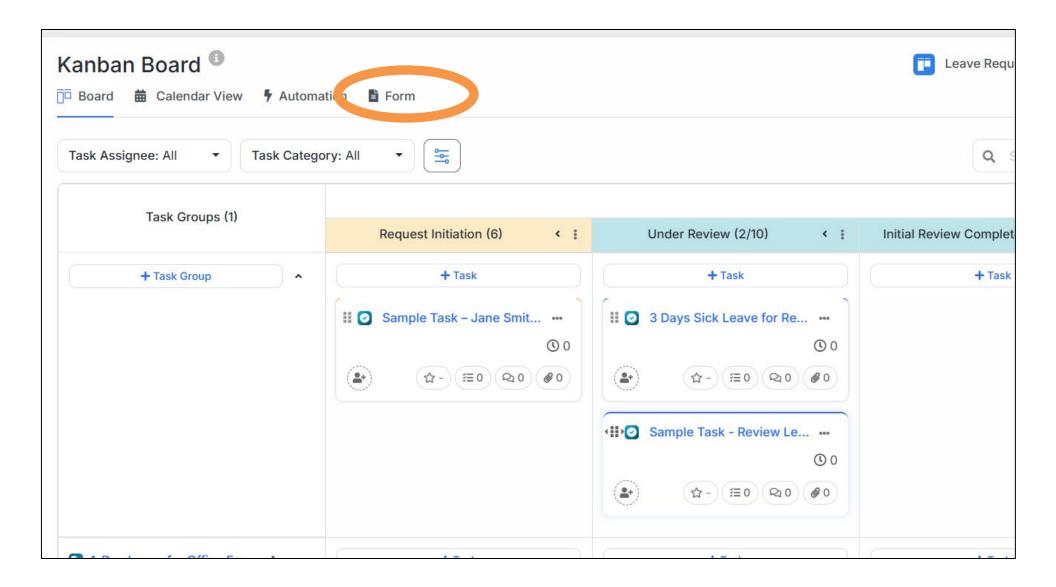








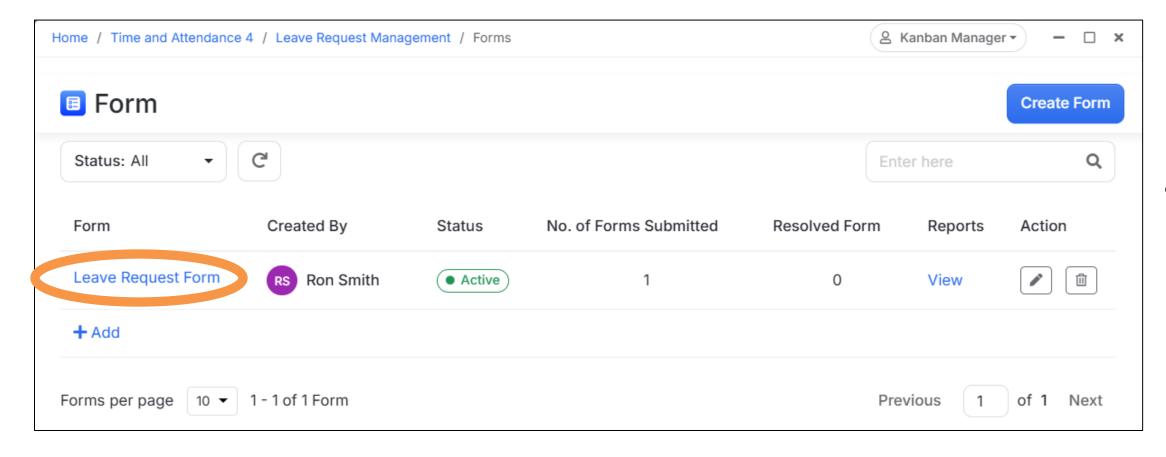




Please click the Form icon at the top of the screen



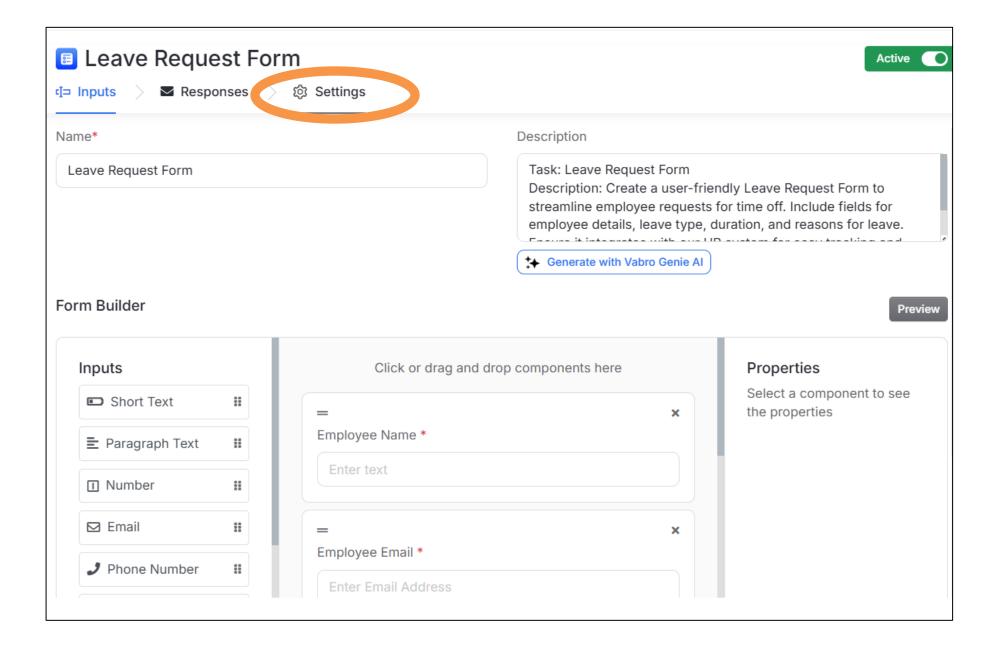




Next, in the Form menu, click on the Leave Request Form.







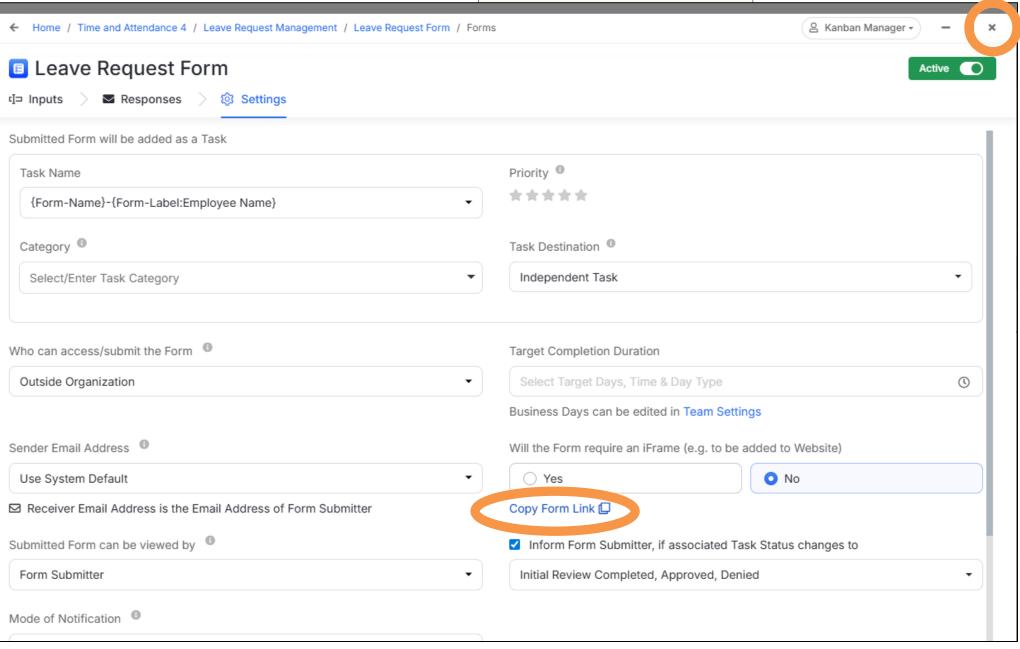
 Please click the Settings tab in the Form menu

3.7 Kanban in Action – A Complete Process



Walkthrough

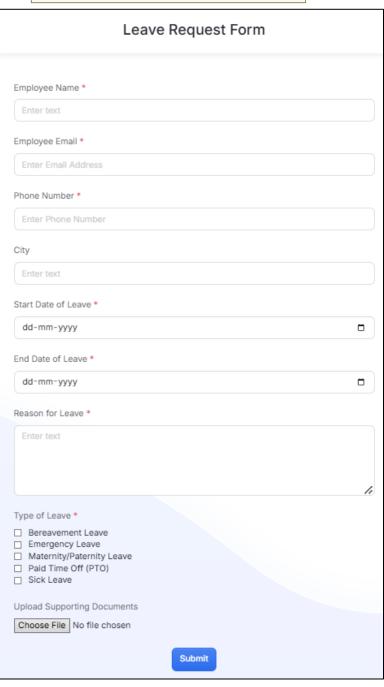




- This will take you to the Settings of the Leave Request Form. Earlier, we had set the form to allow submissions from 'Outside the Organization.'
- Now click the 'Copy Form Link'
 button—this will copy a link to the
 form to your clipboard. Then, click the
 close icon at the top right to close the
 Form Settings menu.
- Next, open your email or any messaging app. Press Ctrl+V to paste the link, and send it to the person you want to fill out the form. For this example, we are sending the link to evelyn.jones@yopmail.com



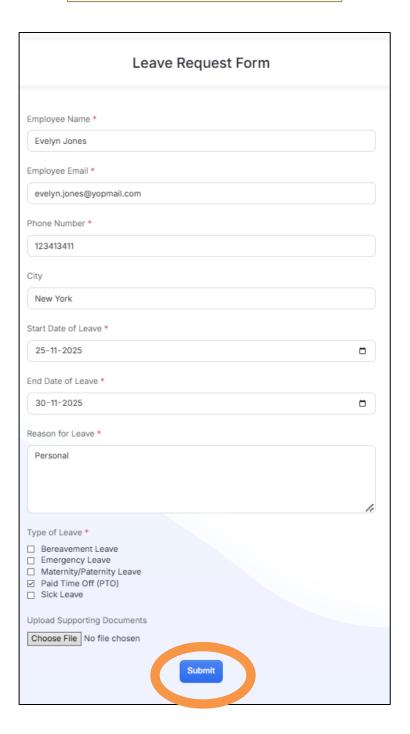




- Evelyn receives an email with a link to submit a Leave Request Form.
- Clicking the link opens the form as shown here—note that this is the same form you created in your Kanban board.



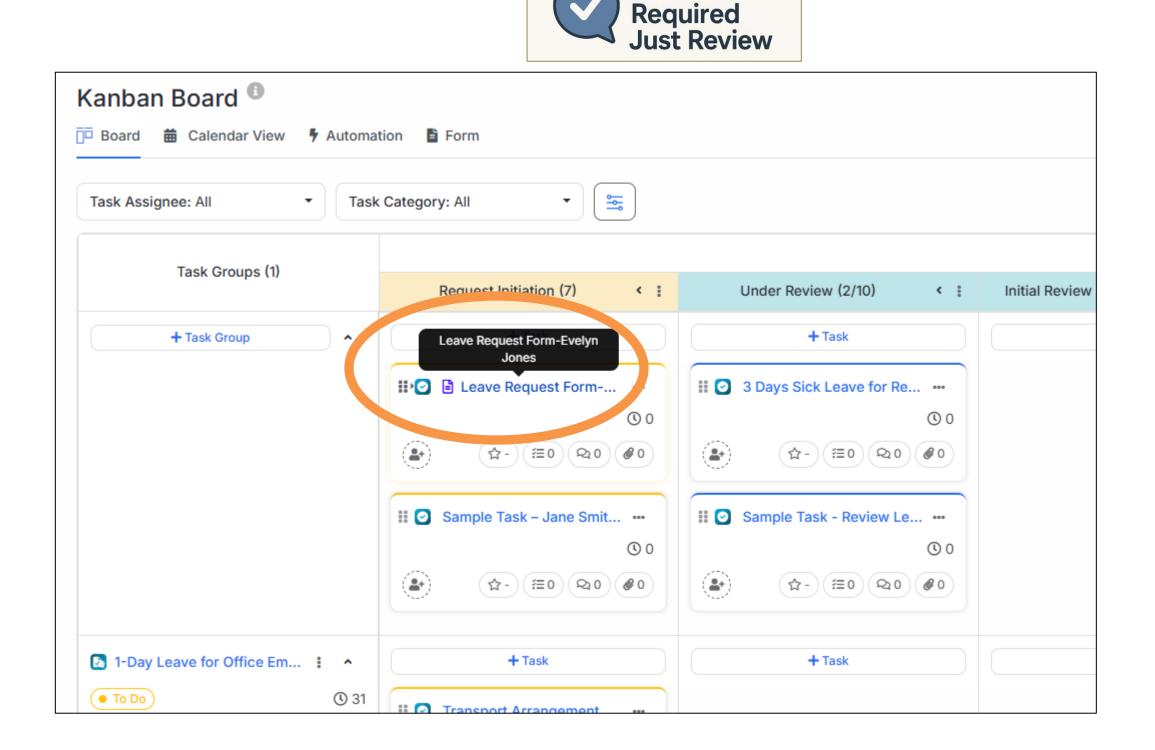




Next, Evelyn fills in all the required information and submits the form.

No Action

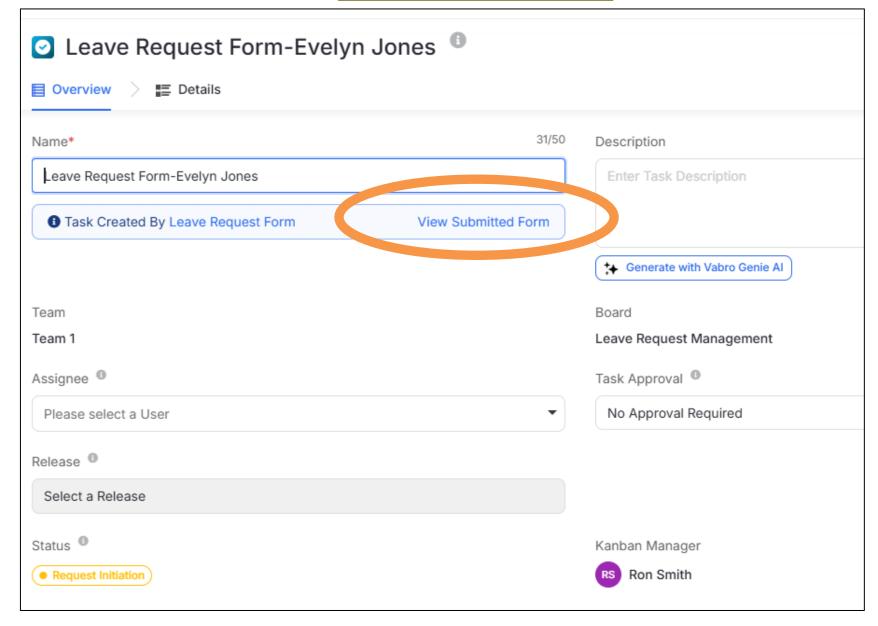




- The submitted form immediately appears as a 'To Do' task in your Kanban Board, as shown here.
- Please click the task name to continue



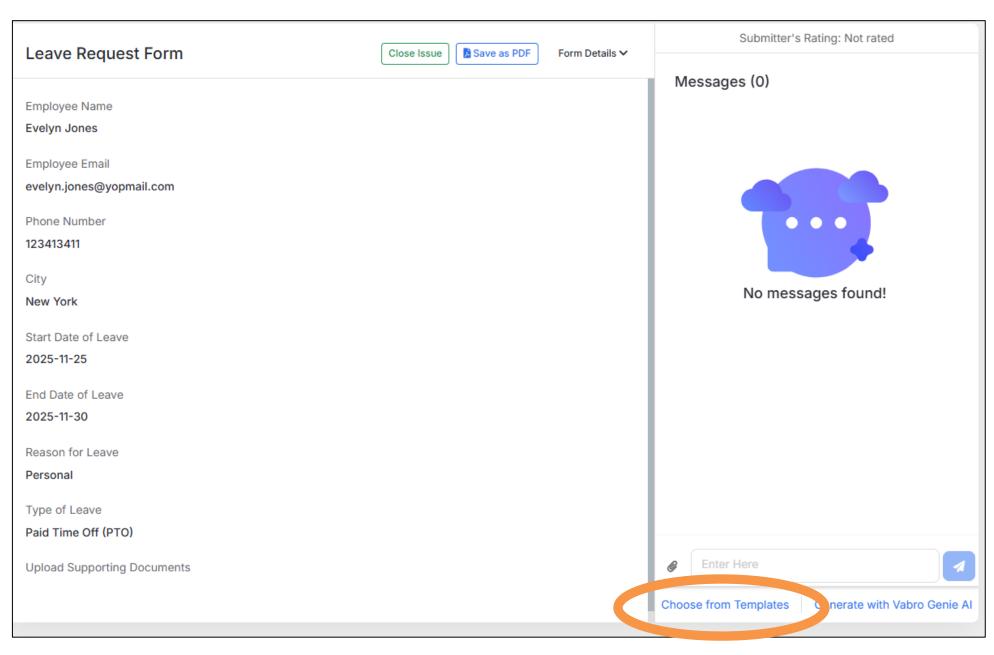




 Please click 'View Submitted Form' to see the form that was submitted



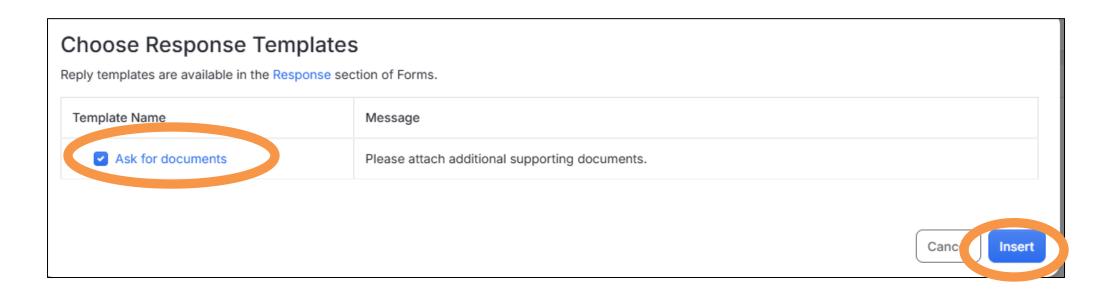




- This opens the form submitted by Evelyn with all the relevant details.
- You can message Evelyn
 directly—first, click 'Choose
 from Templates' to select
 from the templates you
 created earlier when setting
 up your forms.



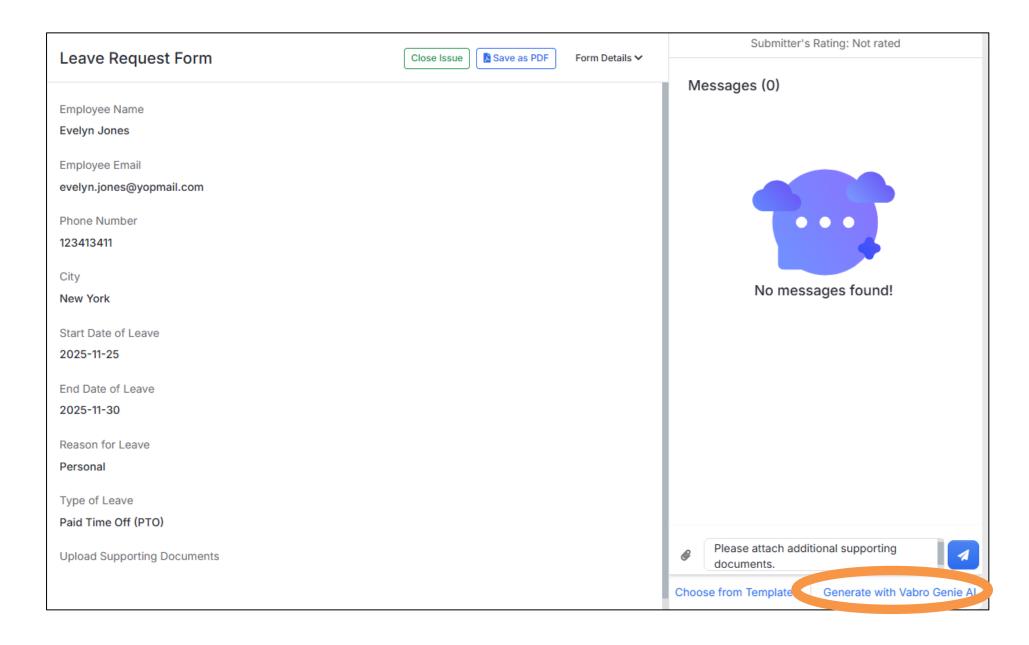
No Action Required Just Review



- This opens the template menu here, you can select the template you created earlier for 'Ask for Documents.'
- Next, click the Insert button. The message associated with the template will then be added to your Form Reply.
- Note: When creating forms, you can create multiple templates for all possible standard queries.
 These templates can then be used to communicate with form submitters whenever a form submission is received.





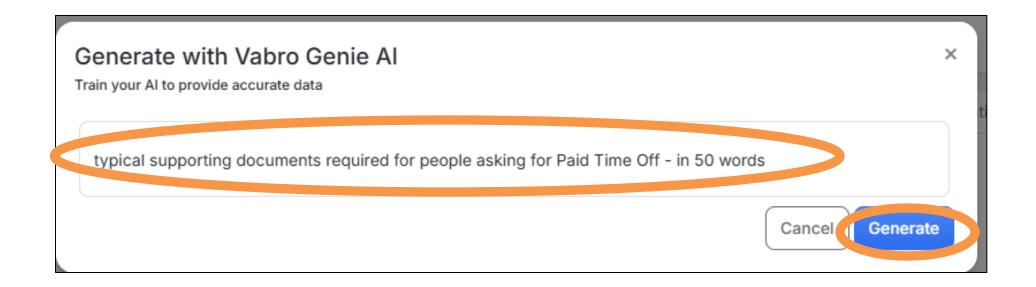


 Now, let's learn how Vabro Genie AI can help answer queries.

Click on 'Generate with
 Vabro Genie Al' to continue."



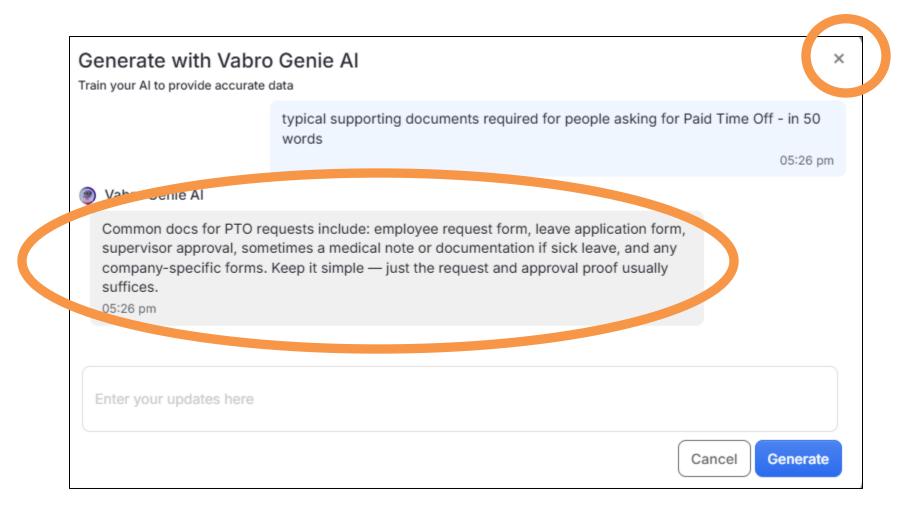




- This opens the AI menu to 'Generate with Vabro Genie AI.'
- Enter an appropriate prompt, such as 'Typical supporting documents required for people requesting Paid Time Off – in 50 words.'
- Then, click on the 'Generate' link.







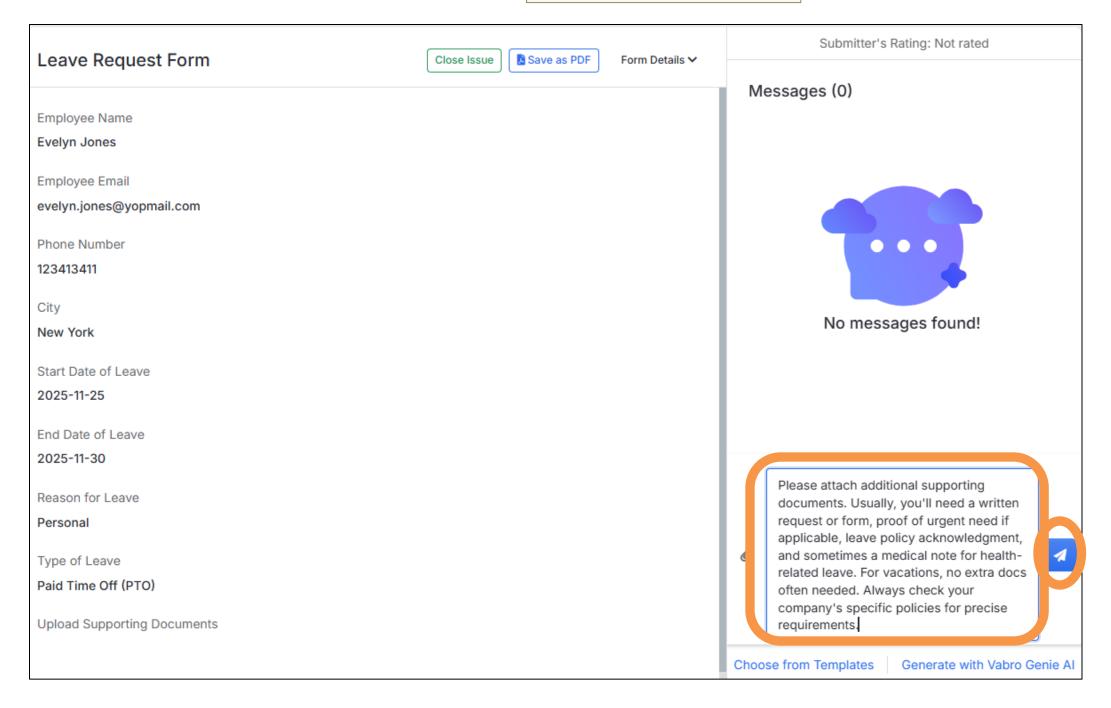
 Vabro Genie Al will provide you with a relevant answer.

 You can review and copy this answer—it can be edited
 later if needed.

 Then, click on the Close button on the right.





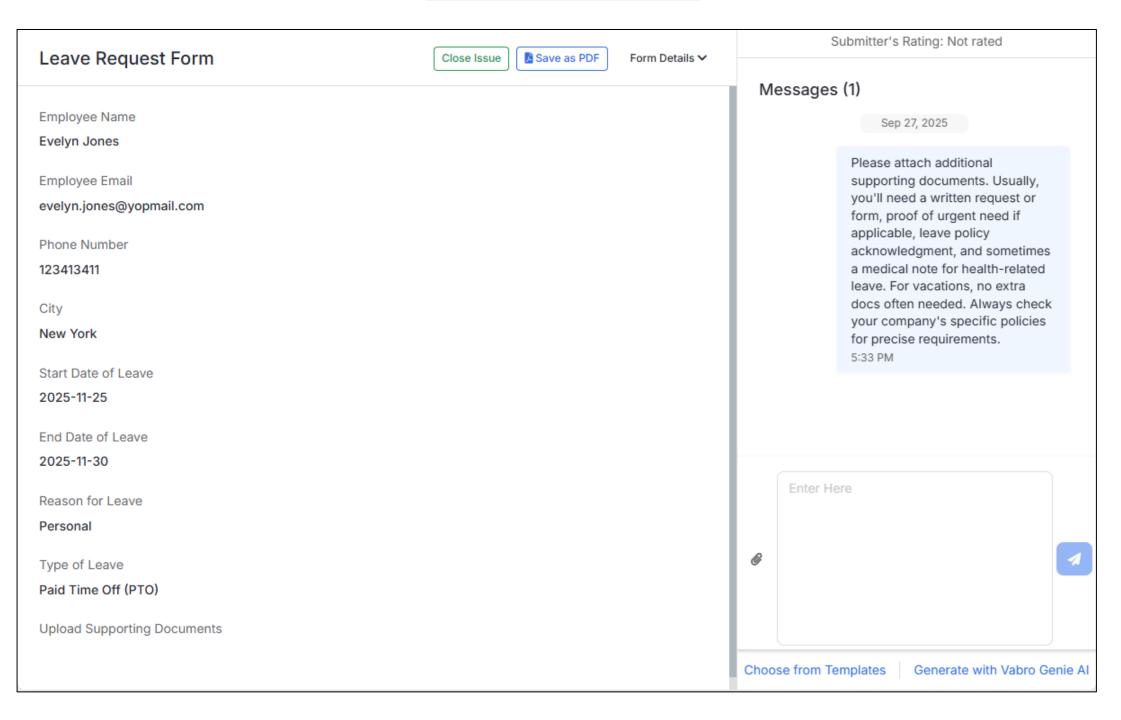


The content generated by Vabro Genie AI in the previous step can be pasted into the Message box. You can edit the entire message if needed.

 Then, click on the Submit button to send your answer to Evelyn.





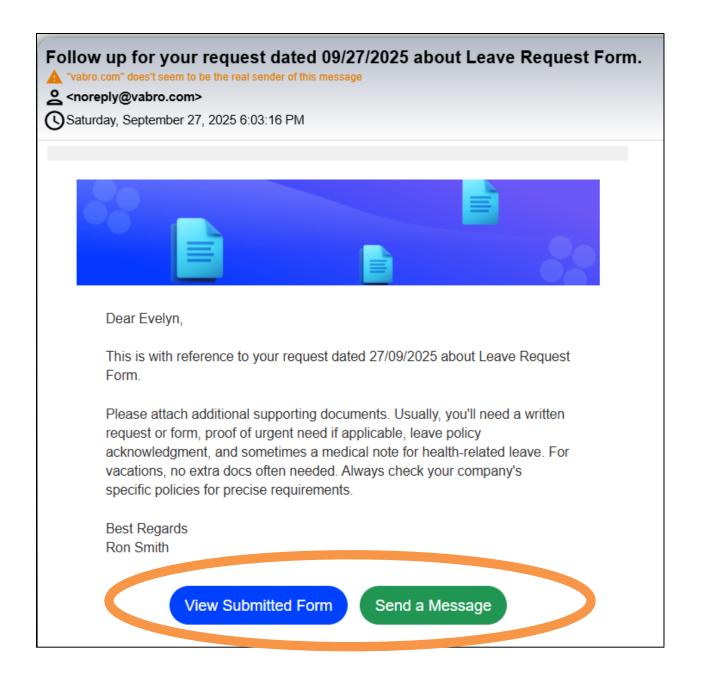


 Please check how the message appears in your
 Form window once it is posted.

 You can also post additional messages in this window to collaborate with the form submitters.





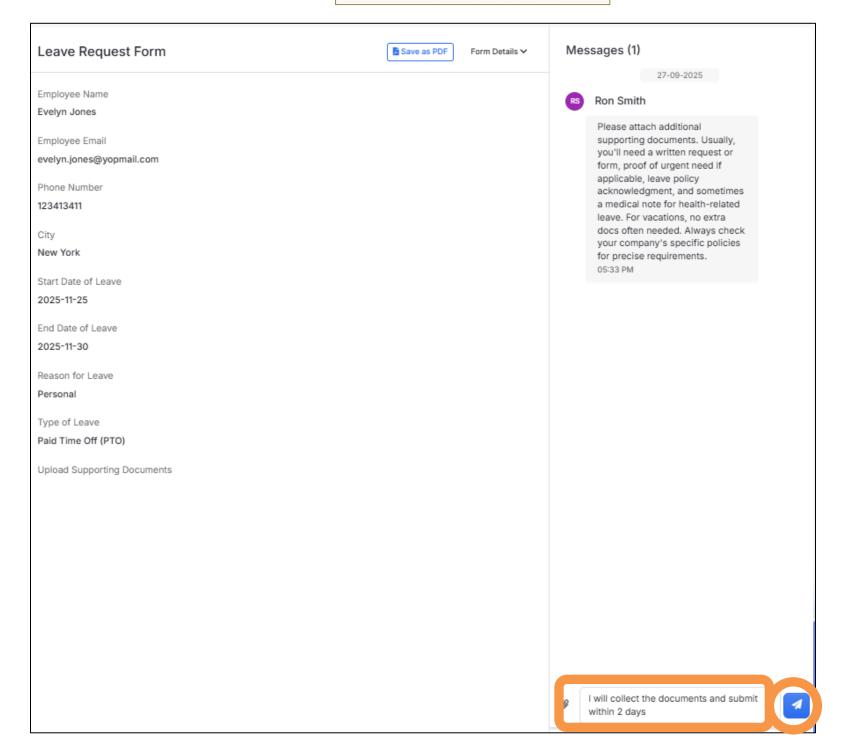


 Now, Evelyn will receive an email with the message you submitted.

 She can click on the 'View Submitted Form/Send a Message' button to see the form details and send a message or attachments to you.



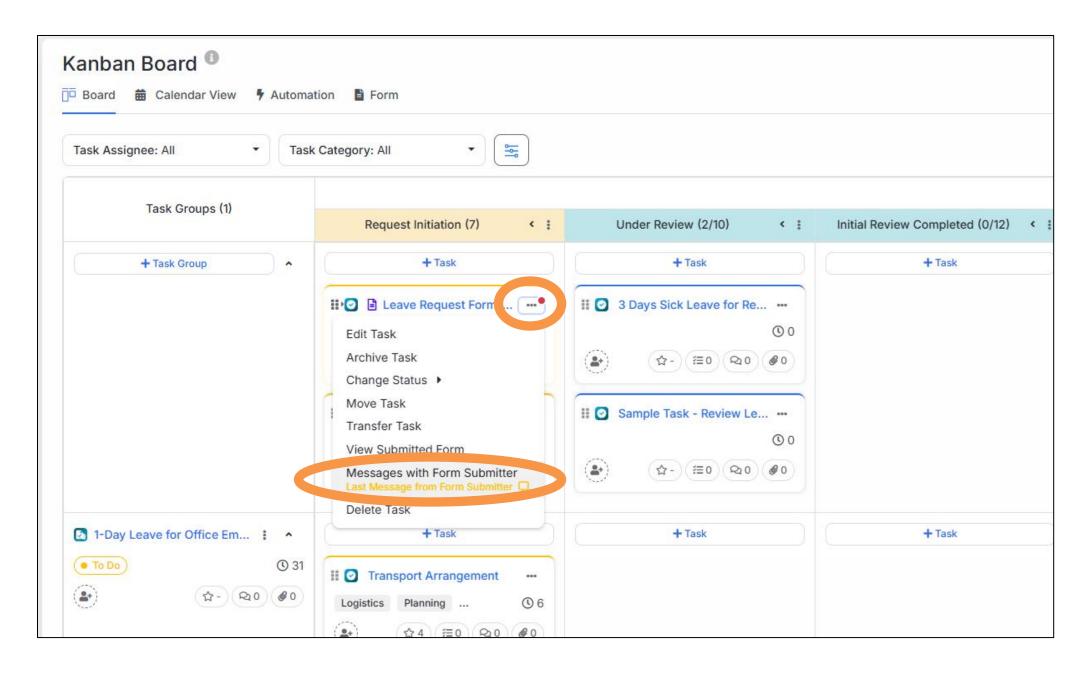




- Evelyn can now see the information submitted by you.
- She then enters a message such as 'I will collect the documents and submit within 2 days' and clicks to submit it to the Leave Request Kanban Board.





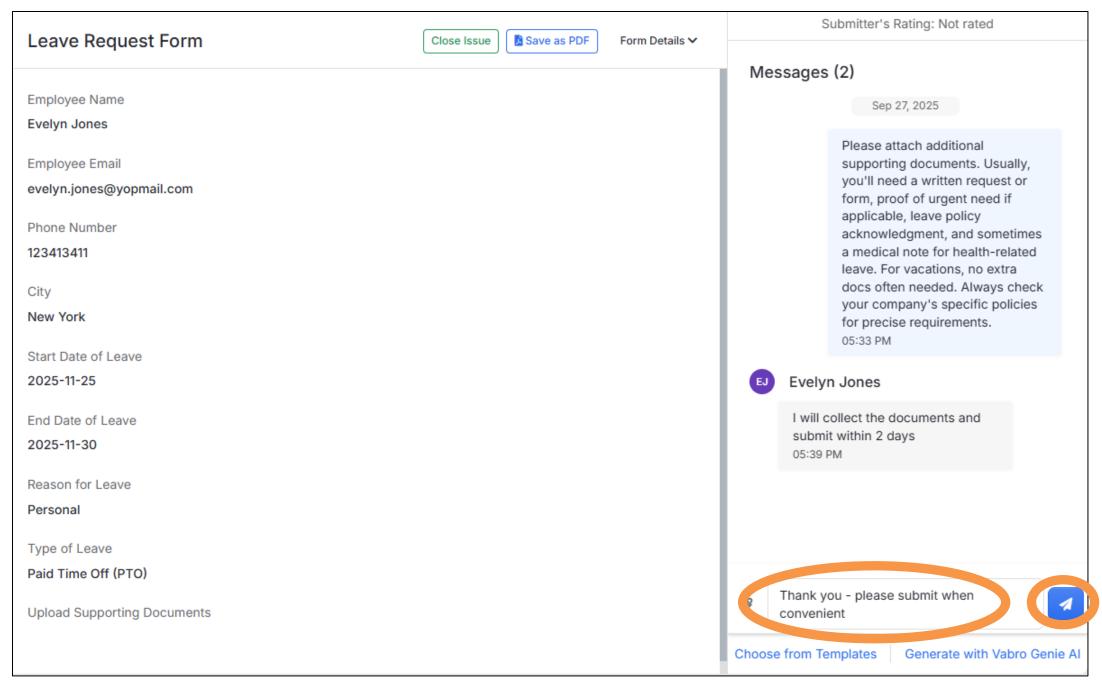


Meanwhile, in your Kanban
 Board, any new message that
has not been answered shows
a 'red dot' above the task.

 Click on the three dots on the right to open the quick reply menu, then scroll down and click on 'Messages with Form Submitter.







 This opens the Forms menu, showing the history of the form and any past messages.

You can enter a prompt such
 as 'Thank you—please
 submit when convenient' and
 then submit the message.

No Action





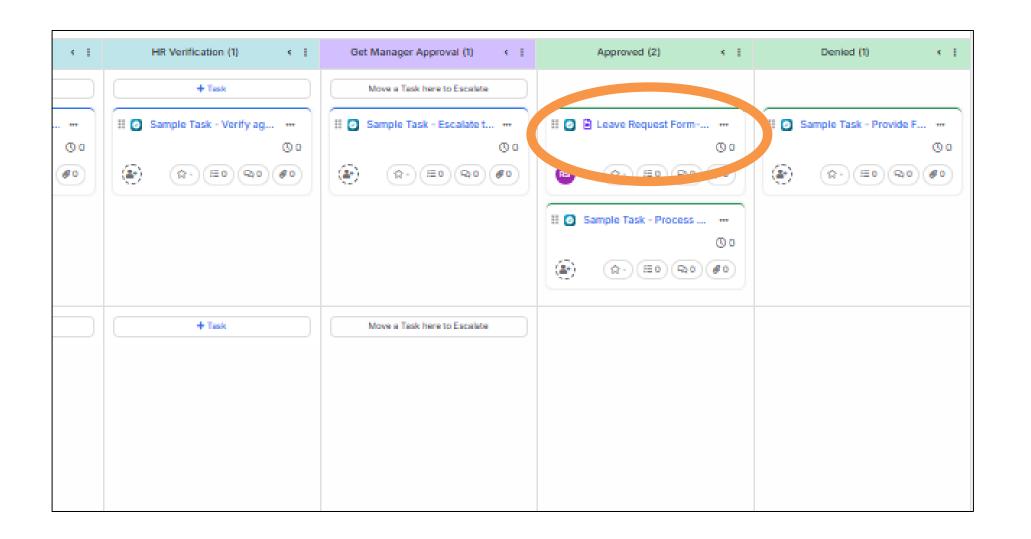
Send a Message

View Submitted Form

- Evelyn sees your reply pop up in her emails. As she did earlier, she can reply by clicking on 'View Submitted Form/Send a Message.'
- This way, the person managing the task on the Kanban Board can collaborate and communicate with the form submitter as tasks get completed.



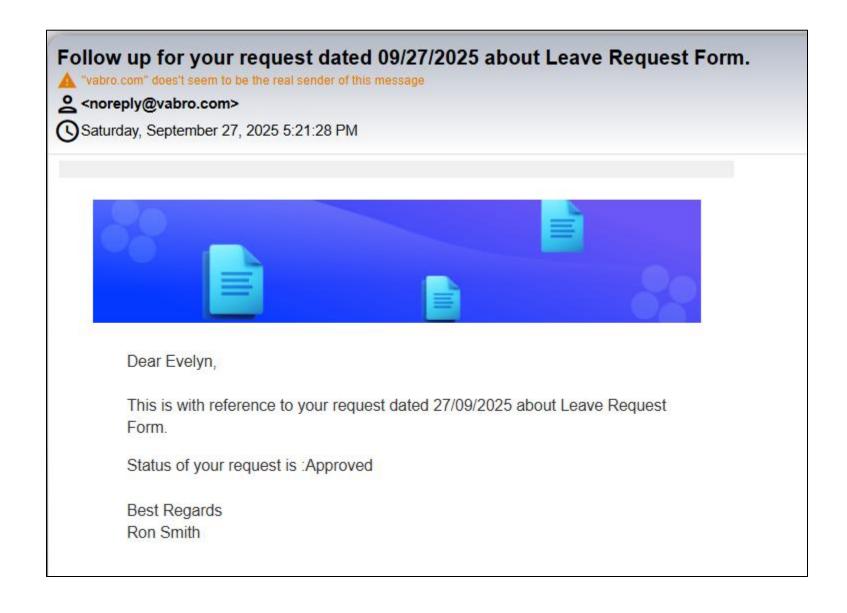




- You can move the task
 through the Kanban Board
 and even escalate if
 required.
- Finally, once the leave is approved, move the task to the 'Approved' column.



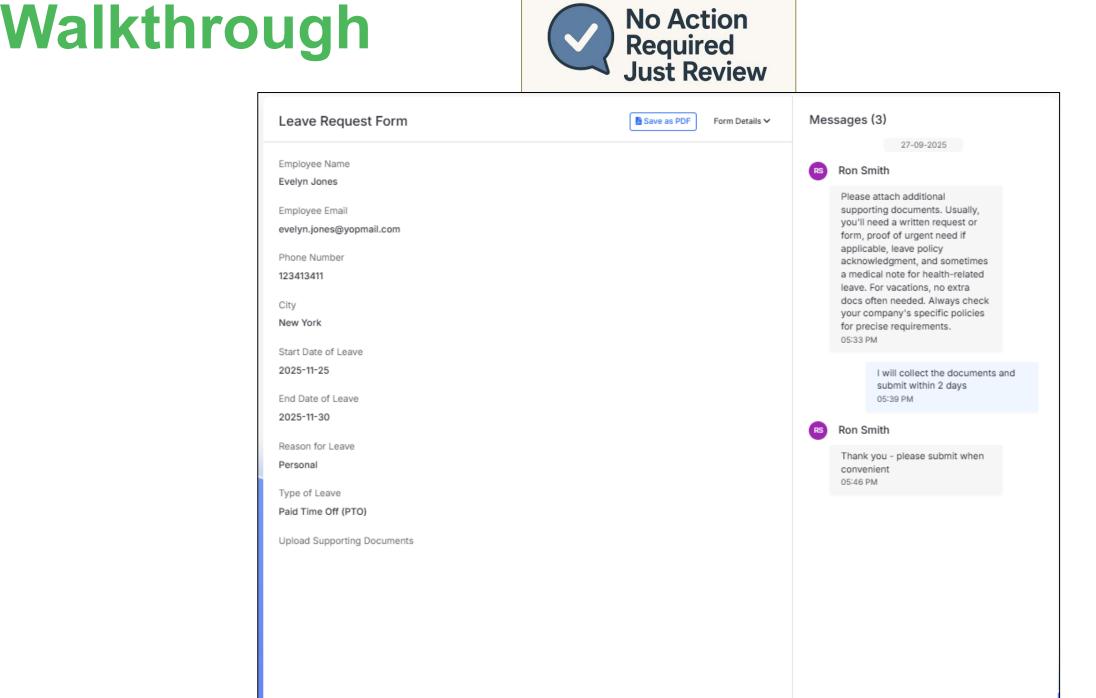




- An automated notification goes out to Evelyn in her email that her leave is approved.
- You had set up earlier that notifications will be automatically sent out to the Form Submitter when Tasks go to specific columns.
- This is a powerful feature which allows Form Submitters to get notified about the status of their tasks.

3.7 Kanban in Action – A Complete Process





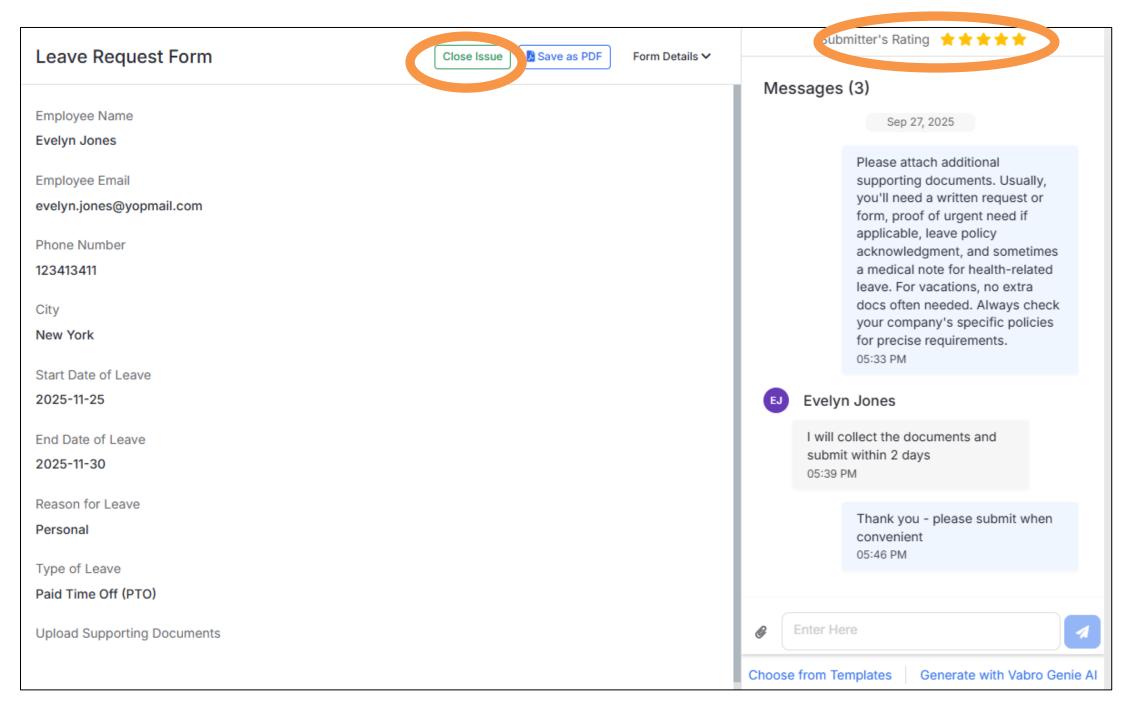
Rate your Experience ***

 At any time during the form submission process, the form submitter can provide a rating and feedback about the process to the Kanban Board.

 To do this, click on the 'Rate your Experience' button available to the form submitters."

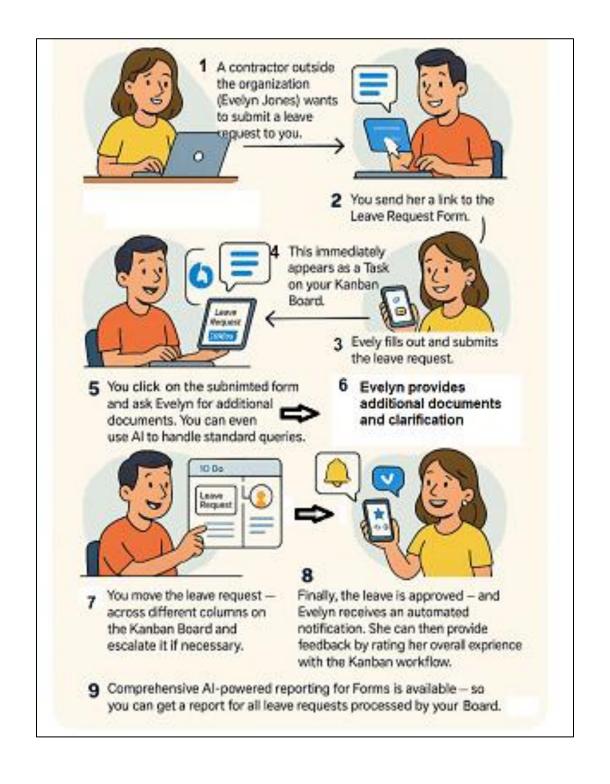




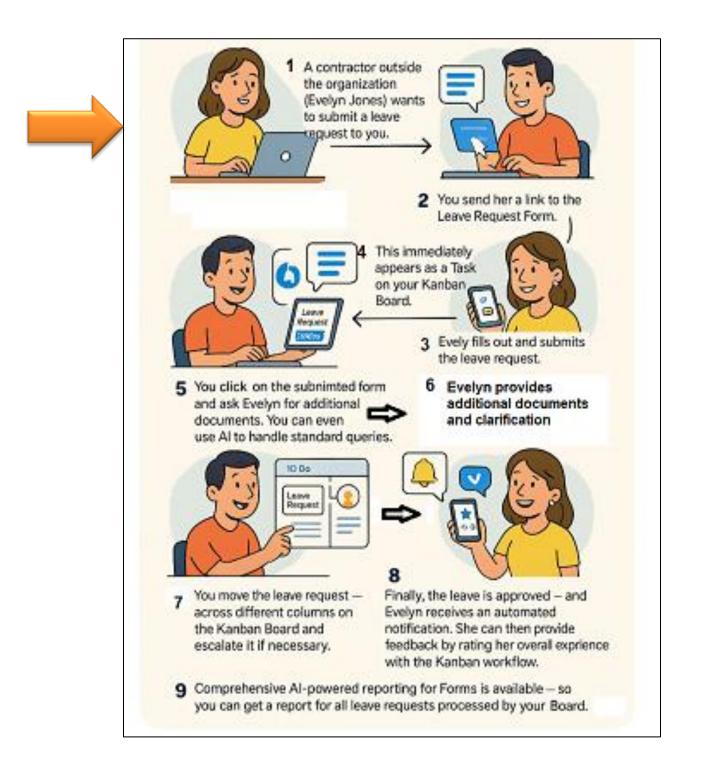


- This rating can be viewed in the top-right corner of the form screen.
- The feedback is also available in the form reports and provides a simple yet powerful way to understand how the process is perceived by form submitters and to identify opportunities for improvement.

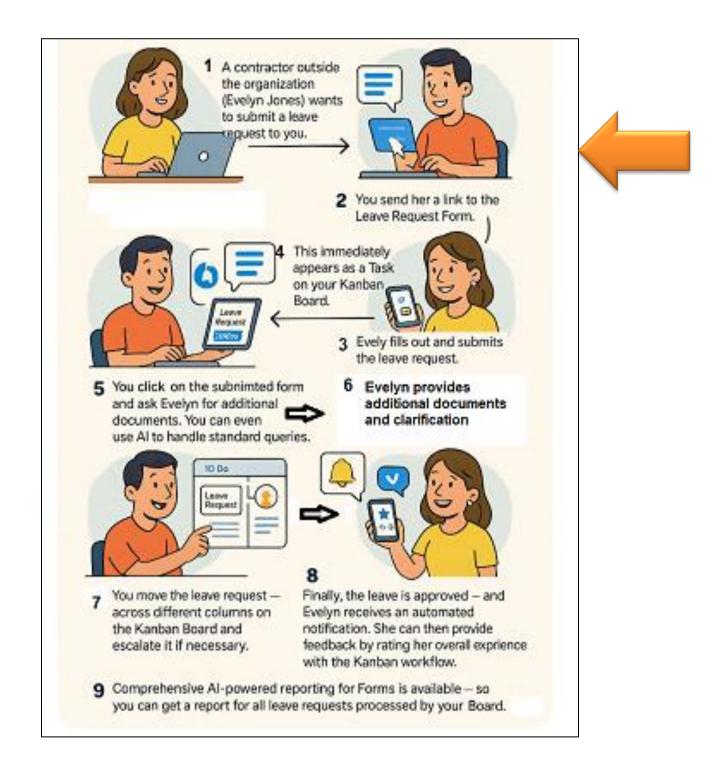




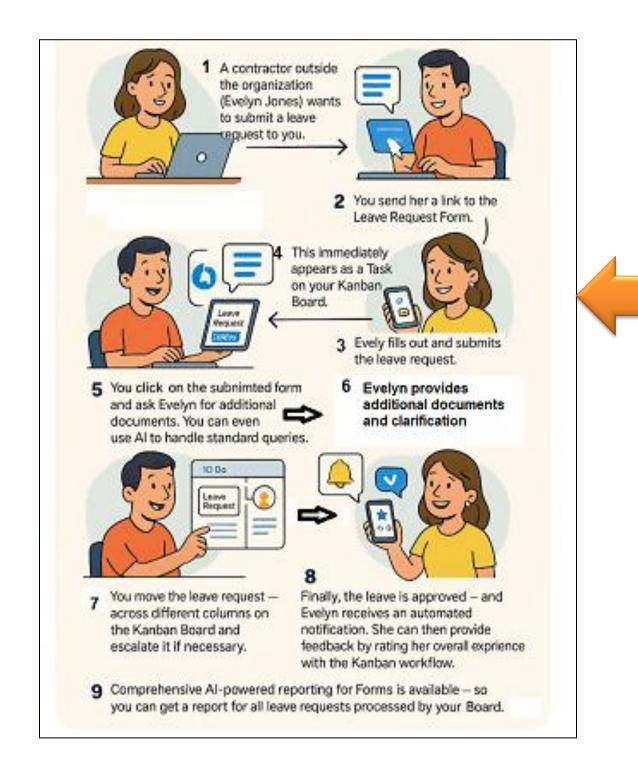






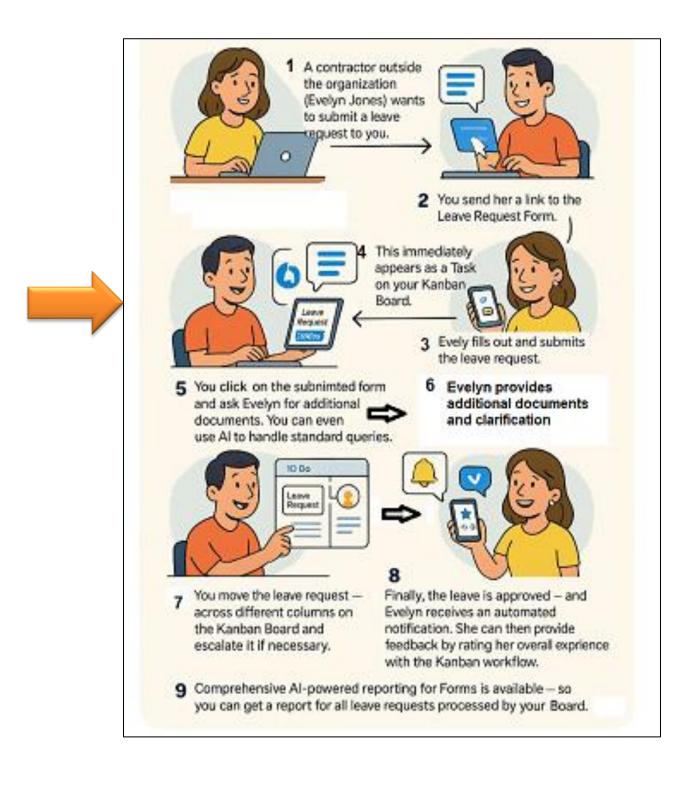






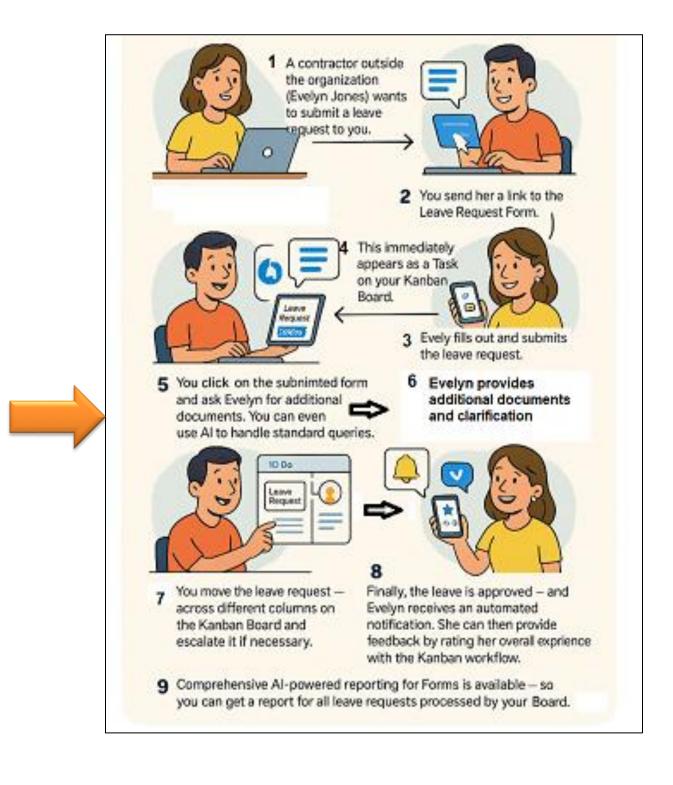
Walkthrough





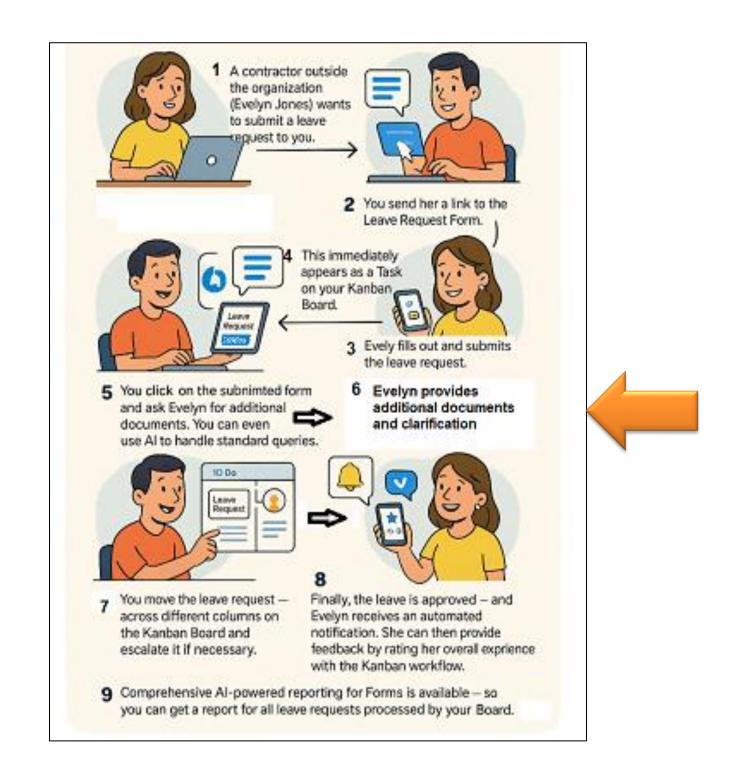
Walkthrough





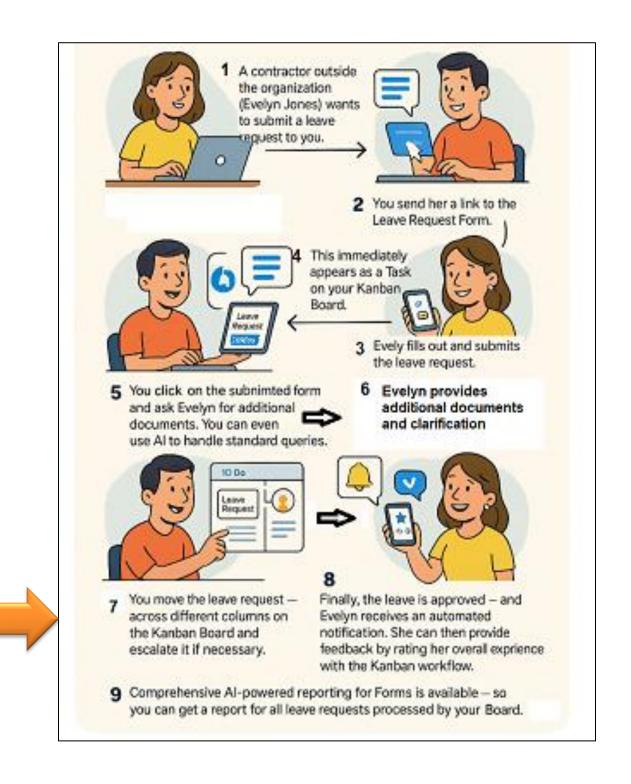
3.7 Kanban in Action – A Complete Process Wanbanstudy Walkthrough





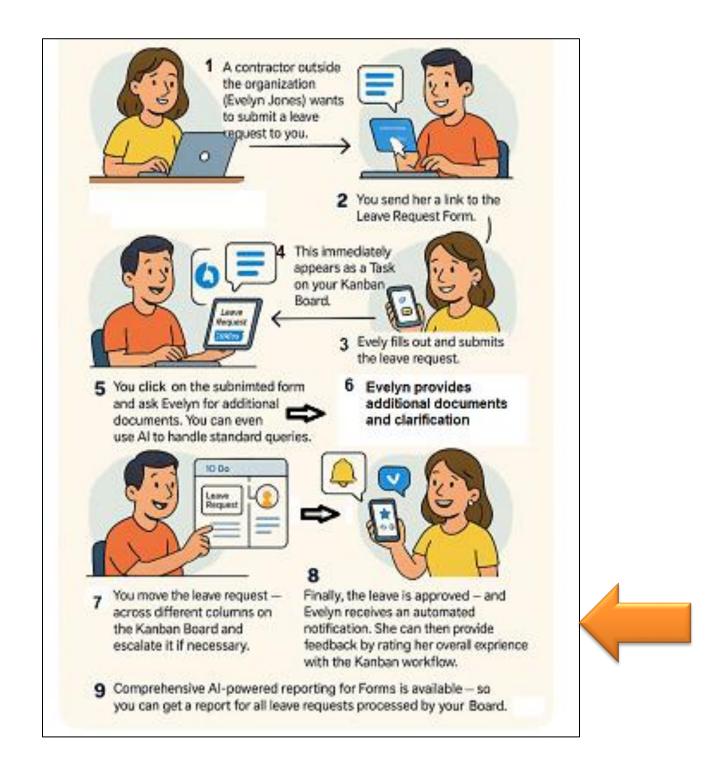
Walkthrough





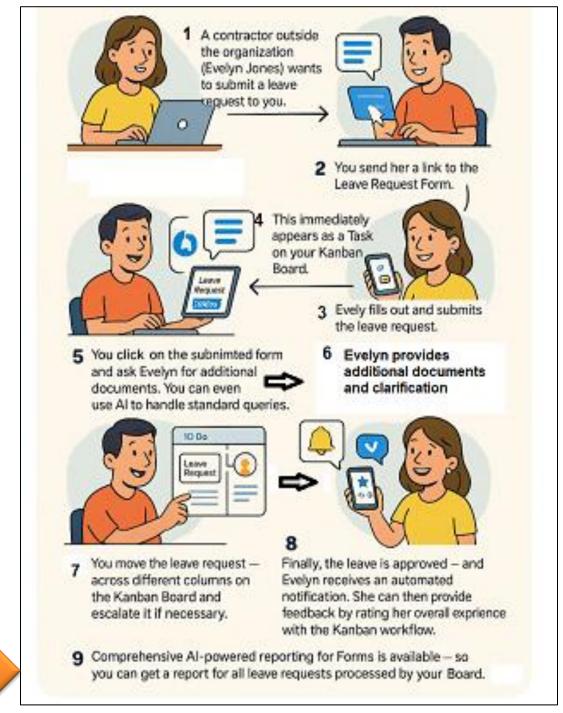
3.7 Kanban in Action – A Complete Process Wanbanstudy Walkthrough





Walkthrough







3. Practical Implementation of Kanban with Al WKanbanstudy **Using Vabro.ai**





Setting up your Vabro.ai account (5 minutes)



Using AI Template to Set Up an HR Workflow (5 minutes)



Understanding the Kanban Board (20 minutes)





Exploring Task Groups and Tasks (20 minutes) 5.



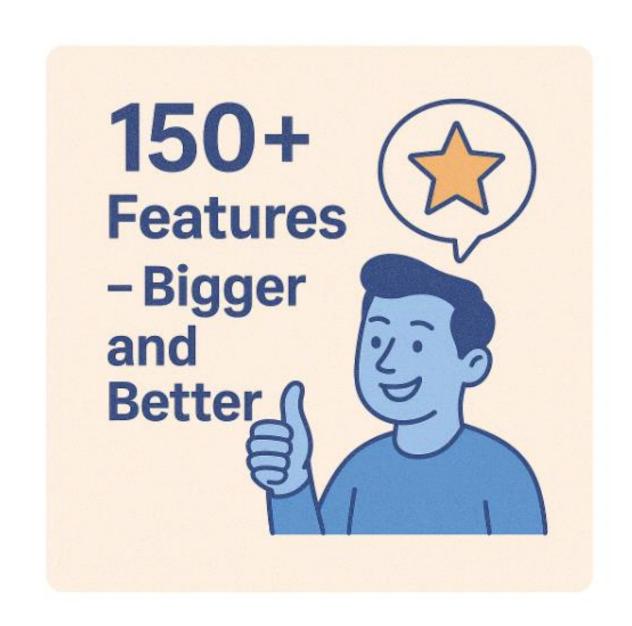
Collaborating using Al-powered Forms (25 minutes)



Kanban in Action – A Complete Process Walkthrough (19 minutes)



- 8. 150+ Features – Bigger and Better (1 minute)
- Create entire process with your Al prompt (10 minutes)



3.8 150+ Features – Bigger and Better



 Cannot cover all the features of Vabro.ai in this demo - this demo is sufficient to help you get started with Vabro.ai.

- Explore additional Al-powered features as you become familiar with Vabro.ai, and implement new features later based on your business requirements and use cases.
- For more details, please visit:
 - Vabro.ai → Products → Frameworks
 - Vabro.ai → Products → Features and Capabilities
 - Vabro.ai → Products → Templates

3. Practical Implementation of Kanban with Al WKanbanstudy Using Vabro.ai





Setting up your Vabro.ai account (5 minutes)









Exploring Task Groups and Tasks (20 minutes) 5.



Collaborating using Al-powered Forms (25 minutes) 6.



Kanban in Action – A Complete Process Walkthrough (19 minutes)



150+ Features – Bigger and Better (1 minute)

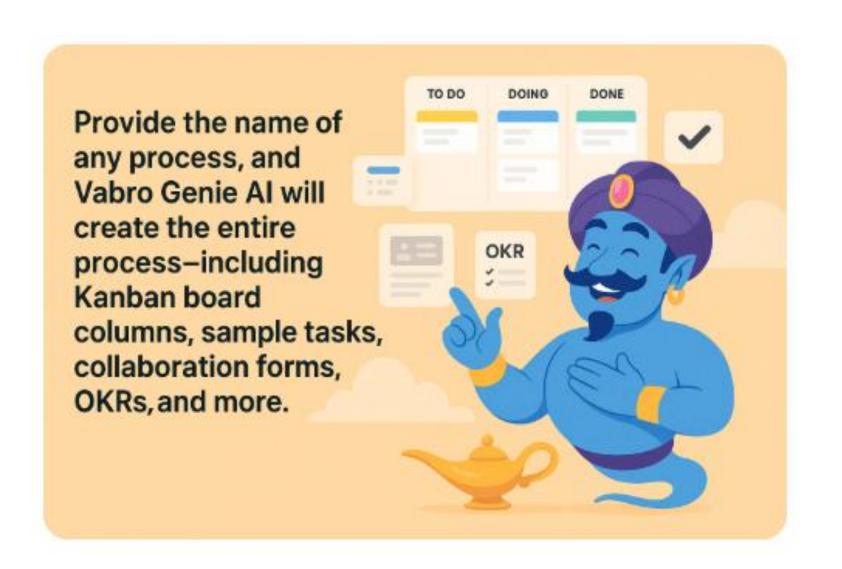


Create entire process with your AI prompt (10 minutes)

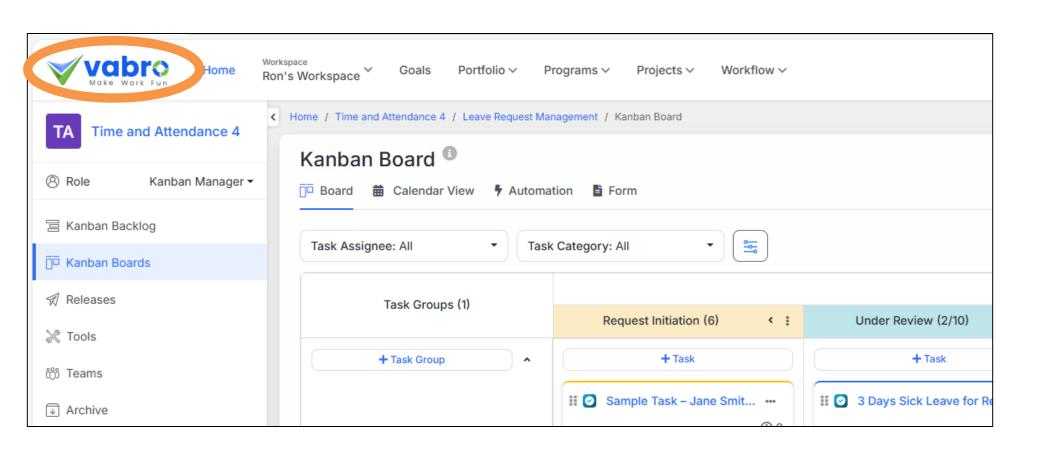




- You have seen how easy and effective it is to create an entire process workflow using Alpowered Vabro.ai templates.
- Now, let us explore the power of Vabro Genie Al as it creates the entire process—including workflows, Kanban board columns, sample tasks, collaboration forms, OKRs and more. You only need to provide the name of the process you want Vabro Genie Al to create for you.

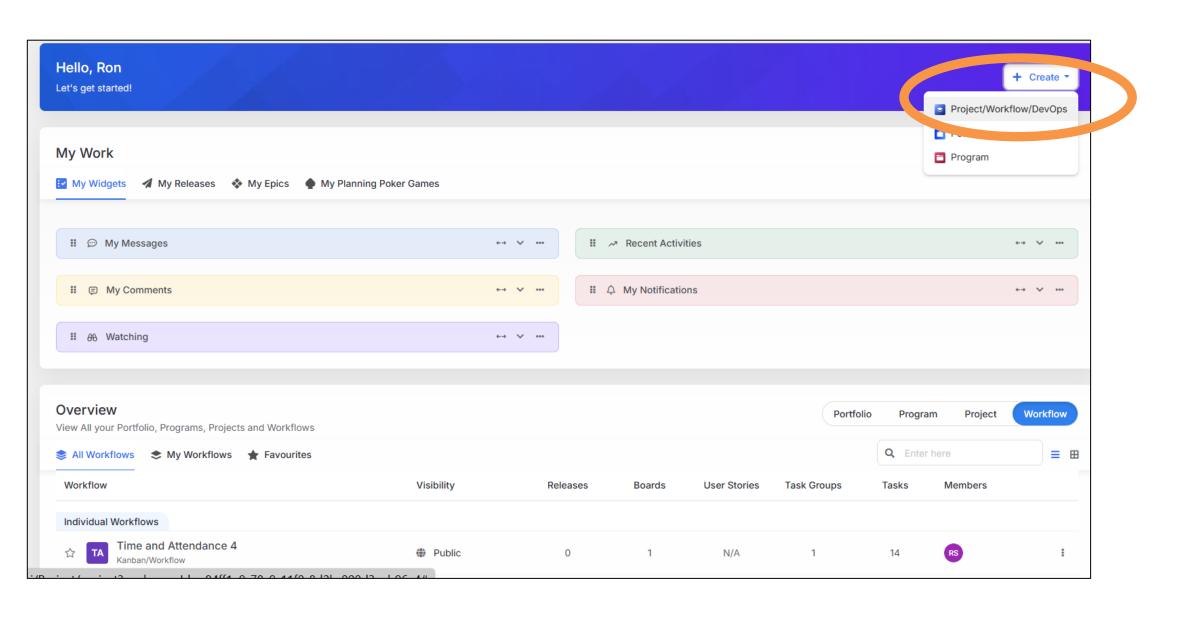






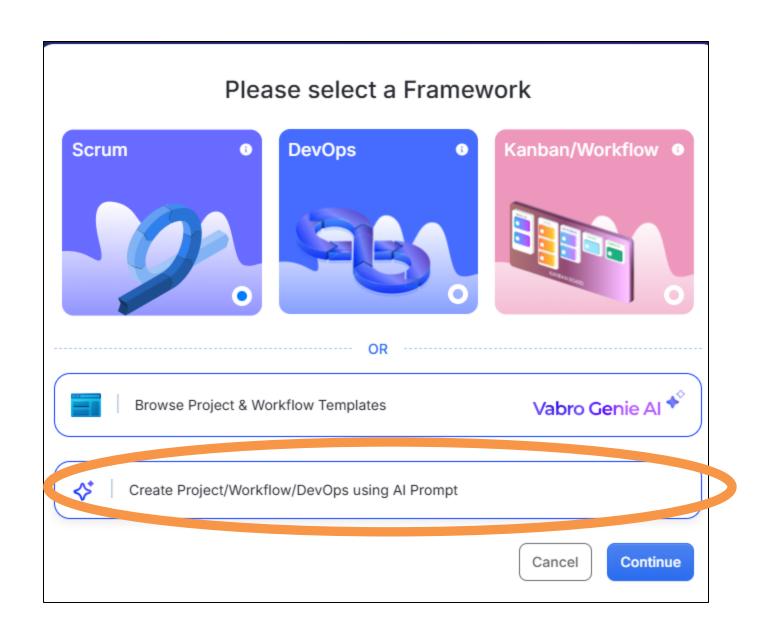
 Click the "Vabro" logo in the top left corner to access your Dashboard.





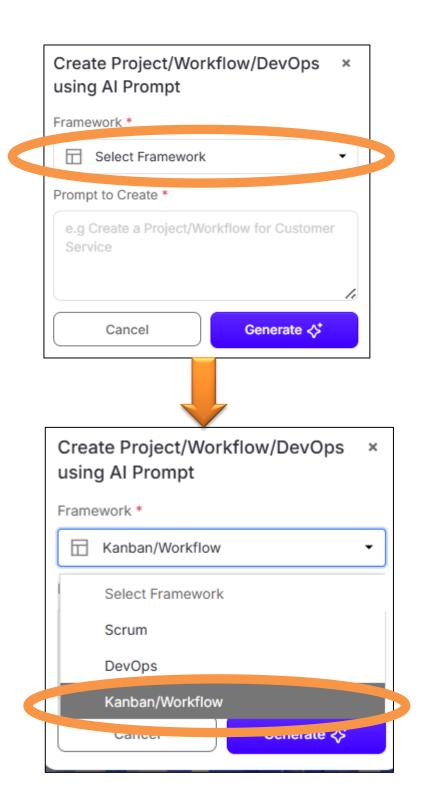
- Click the +Create button at the top right of the screen.
- Then, select the first option:
 "Project/Workflow/DevOps."





Next, click the second button: 'Create
 Project/Workflow/DevOps using AI Prompt.'

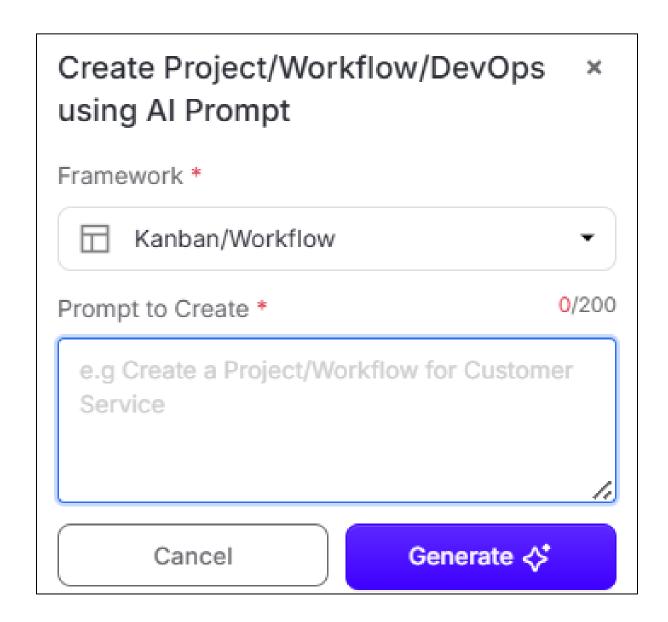




In the next menu, click on 'Select
 Framework' and choose 'Kanban/Workflow'.







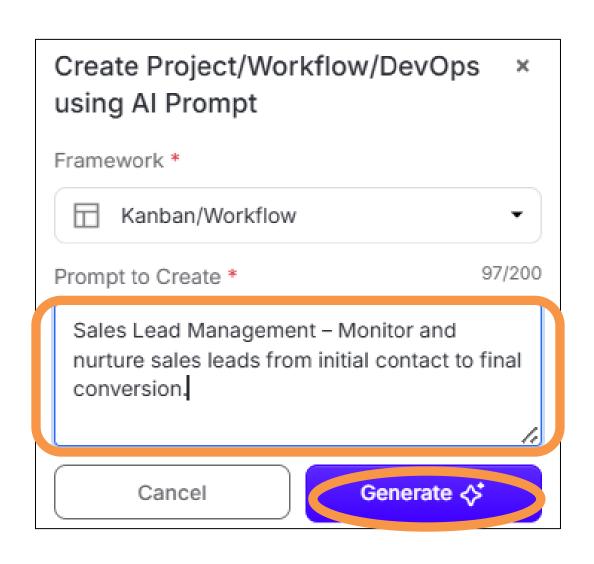
 This opens a window where you can enter an Al prompt for any process you want to use to create a complete Kanban workflow.



Some sample process names are shown below. Please take **45 seconds** to review them and think of a suitable process or workflow name relevant to you

- Content Creation Pipeline Organize idea generation, drafting, and publishing for blogs and social media.
- Customer Support Workflow Streamline ticket handling for customer issues and service requests efficiently.
- Software Development Sprint Coordinate planning, development, and testing tasks for agile software projects.
- HR Recruitment Workflow Oversee job postings, interviews, and hiring processes for new employees.
- Marketing Campaign Management Track planning, execution, and performance of marketing campaigns effectively.
- Procurement Process Workflow Simplify vendor selection, purchasing, and invoice processing in procurement activities.
- Sales Lead Management Monitor and nurture sales leads from initial contact to final conversion.
- Product Launch Workflow Coordinate product launch activities, timelines, and stakeholder communication smoothly.
- Event Planning Workflow Plan, organize, and execute corporate or community events efficiently.
- Employee Training Workflow Manage training schedules, content creation, and participant feedback for employees.

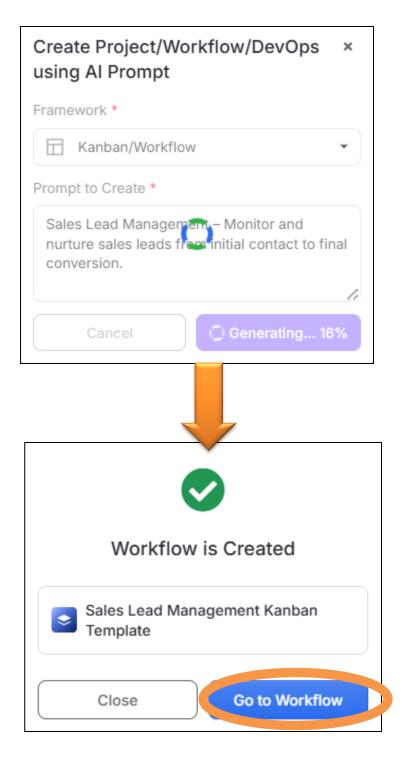




 In the Prompt window, enter a relevant Al prompt for the process you want Vabro
 Genie Al to generate.

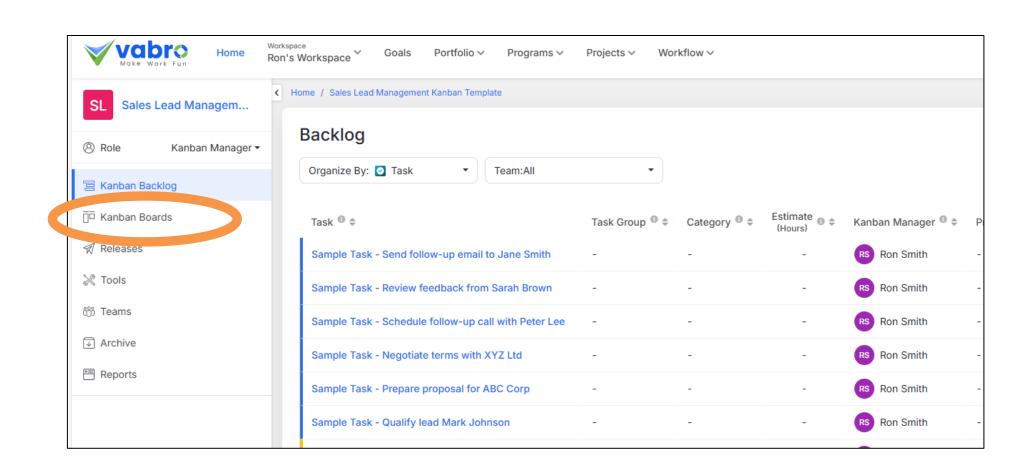
Then, click the 'Generate' button.





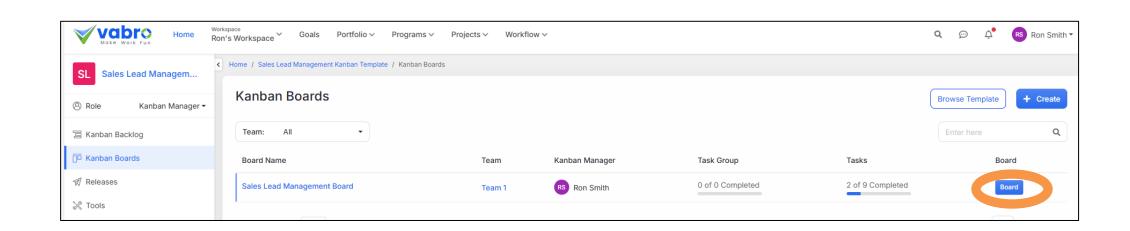
- Vabro Genie Al generates the relevant process workflow for you.
- Once the workflow is created, click the 'Go to Workflow' button.





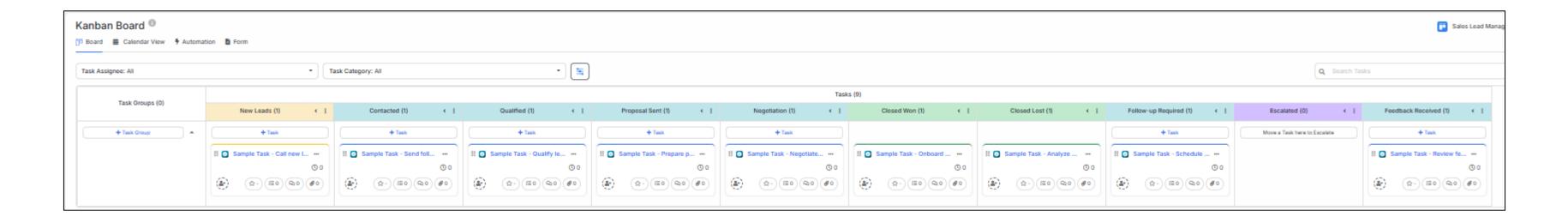
Click on Kanban Boards in the left menu





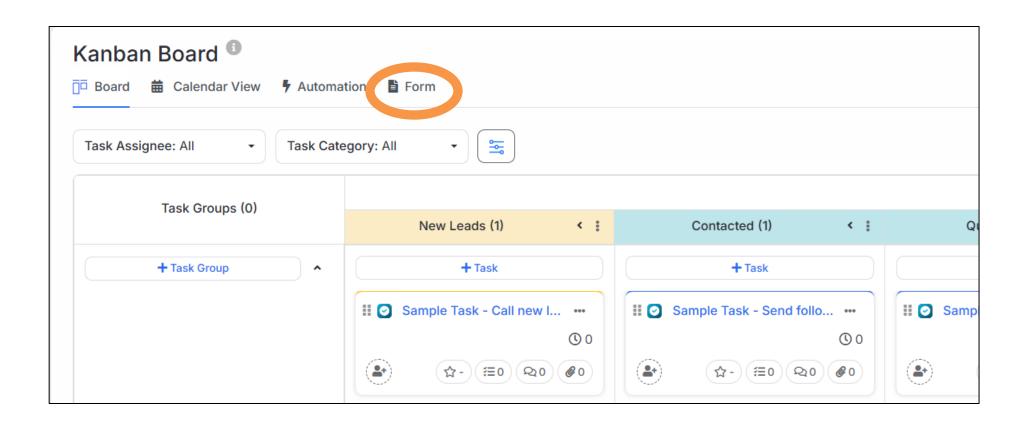
Click on the 'Board' button for your workflow





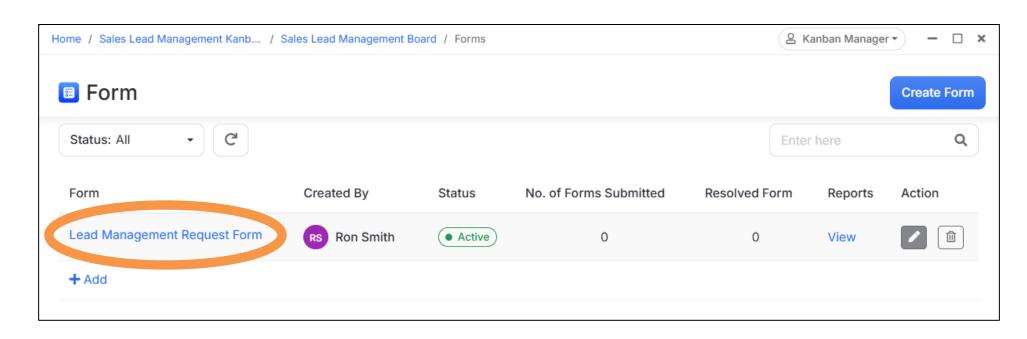
- You will now be able to see the Kanban Board.
- Please spend 3 minutes reviewing all the columns and sample tasks generated for the Kanban prompt you provided.
- Does this Kanban Board look relevant to your needs? If not, you can edit the entire Kanban Board, including all columns, as per your requirements.





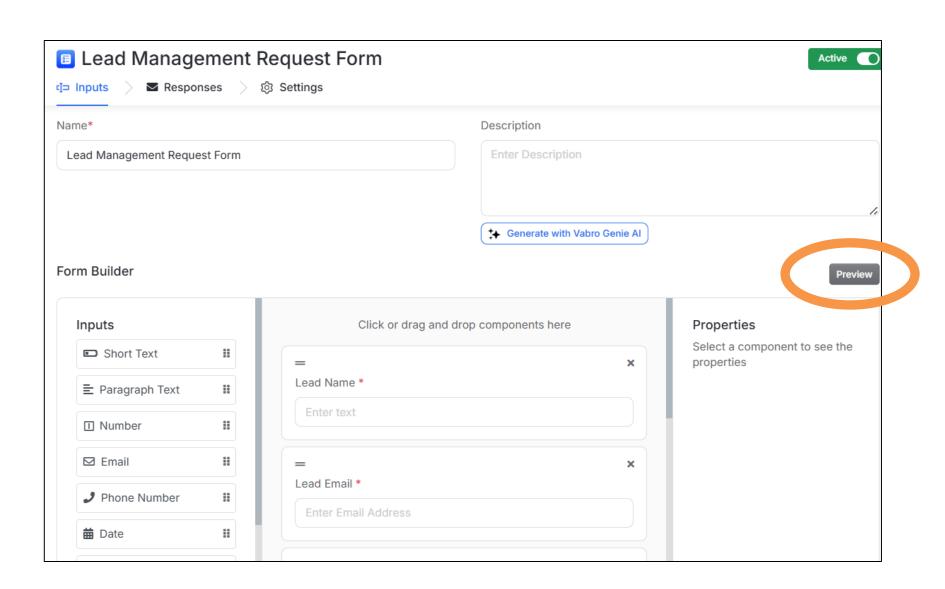
• Now, click on 'Form' in the top menu.





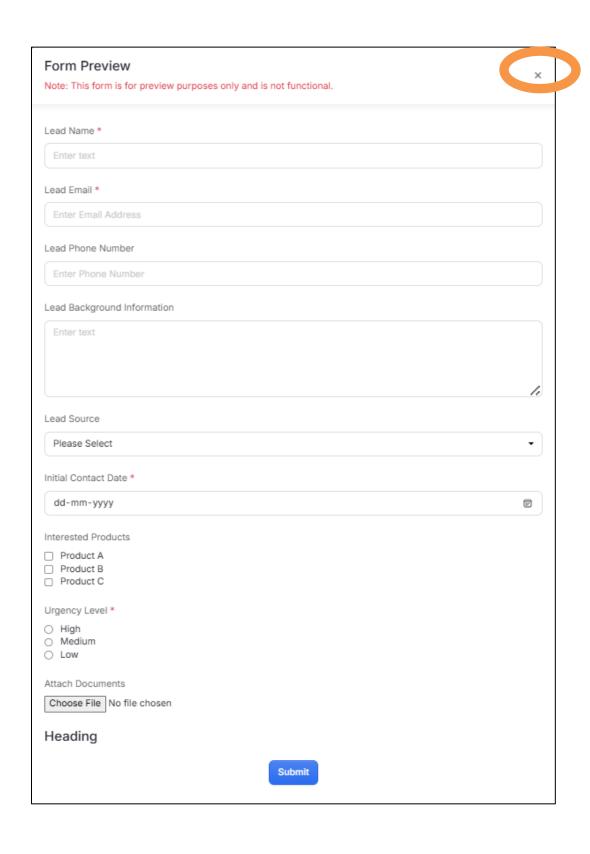
 Next, click on the name of the Form created for your Kanban Board.





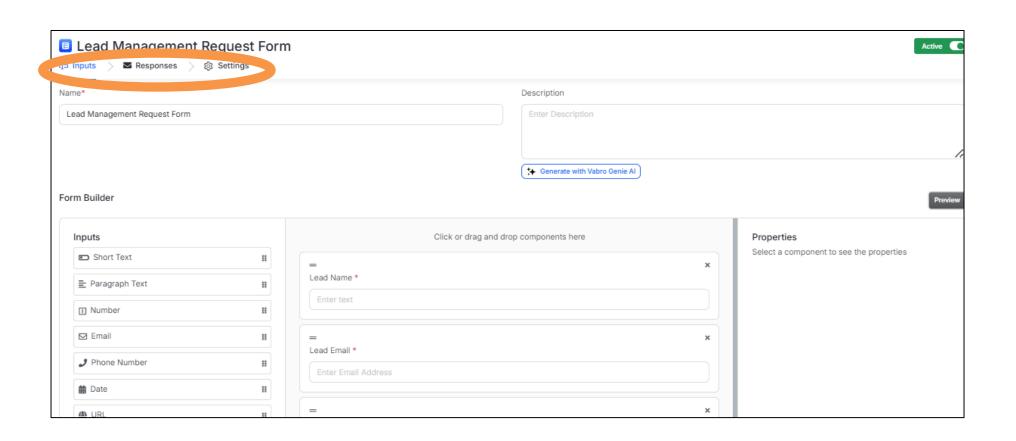
- This will take you to the Form menu, where you can edit the details of the Form created by Vabro Genie Al for your workflow.
- Please click on the **Preview** button to continue.





- Please review the Form for 45 seconds.
- Is this relevant to your workflow process?
- Then, click on the close icon in the top right corner of the screen.



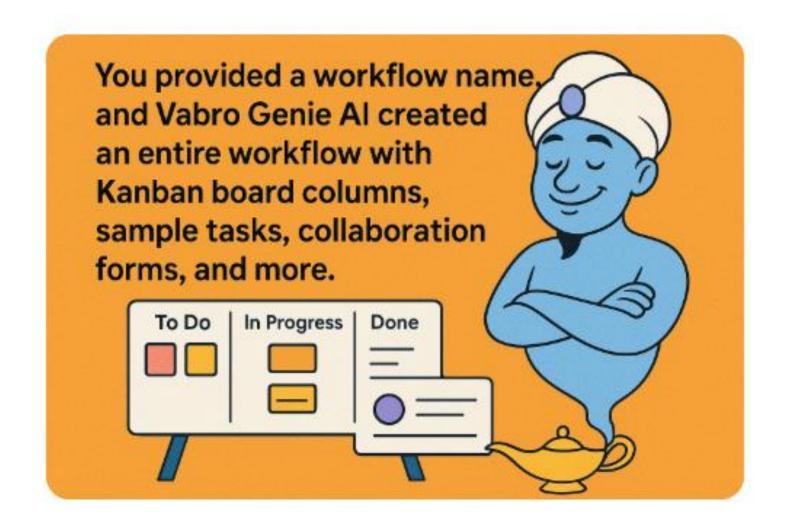


 Later, you can click on the top menu bar to edit the complete Form, including Inputs,
 Responses, and Settings.

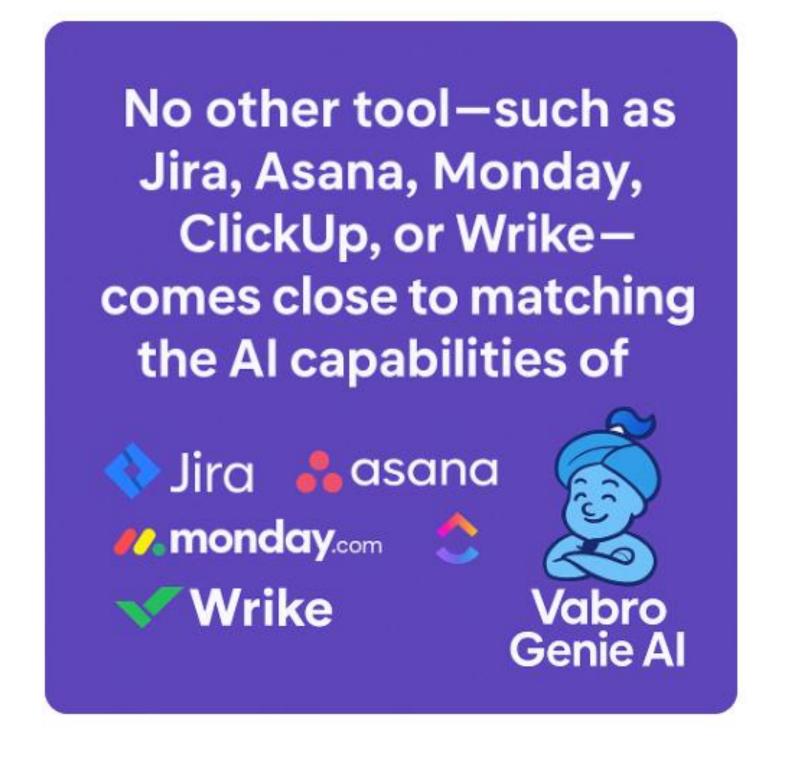


What have we accomplished so far?

 You provided a workflow name, and Vabro Genie AI created an entire workflow with Kanban Board columns, sample tasks, collaboration forms, and more.







Index



- 1. Webinar Format and Prerequisites (5 mins)
- 2. Kanban Overview and Why use Kanban? (30 mins)
- 3. Practice a Kanban Workflow with Vabro.ai (2 hours)
- 4. Get your KACTM Certification! (5 mins)
- 5. Next Steps (5 mins)



4. Get your KACTM Certification



To get the **KACTM** certification,

- Complete the Vabro.ai demo included in this webinar.
- Upload a screenshot of the Kanban
 Board you created using an Al prompt
 generated by Vabro Genie Al
- The VMEdu team will review your submission and award the certificate within 2 business days.

For more details about this certification exam, please visit Kanbanstudy.com -> Certification -> Kanban with Al Certified (SACTM)

To apply for this certification, you can

- Click on the link available in this webinar
- Visit: https://www.kanbanstudy.com/account/register

If you have completed this webinar and the Vabro.ai demo, you can upload an image of the Kanban Board created now during the session to receive your KAC™ Certification!

4. SACTM Certification



To get the **KAC™** certification,

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- Webinar Format and Prerequisites
- 2. Scrum Overview and Why use Scrum?
- 3. Practice a Scrum project with Vabro.ai
- 4. Get your SACTM Certification!
- 5. Next Steps



5. Next Steps



Thank you for joining this webinar!

We hope you enjoyed it and gained valuable insights. Kindly submit your feedback using the link available in the webinar portal. Please take **3 minutes** to provide your feedback now.

Note that you will receive a certificate for completing this webinar after submitting your feedback for this session.



5. Next Steps



Please ensure that you obtain your highly valued KAC™ certification, and display it on your LinkedIn profile, and other Social Media.

Please refer your friends and colleagues to this webinar. You'll earn discount vouchers and other benefits when you refer your colleagues to this webinar.



5. Next Steps



The learning doesn't stop here — explore other advanced certifications available at www.Kanbanstudy.com

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Learn about related fields such as Scrum, Business Analysis, OKRs, Six Sigma, and more and discover how AI can improve productivity in all of them. **ANALYSIS SCRUM** You can also earn valuable free certifications!

All the best!

