



10 EXPERTS

SHARE TIPS ON HOW TO
GET STARTED WITH
AGILE MARKETING



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INTRODUCTION

Agile Marketing—you've heard of it. Maybe you're even thinking about trying it. But if you're anything like the majority of marketers, you might be feeling overwhelmed at the thought of learning a whole new methodology, trying to get your chief marketing officer and team on board, and introducing so much change to your team. All valid concerns.

However, research shows that the vast majority of marketers who embrace Agile Marketing are seeing fantastic results, including faster speed-to-market, increased team morale, more productivity, better prioritization, and improved marketing quality. With those kinds of benefits, passing on Agile Marketing might actually do more harm than good in the long run.

Luckily, a handful of innovative marketers have already started laying the foundation of Agile Marketing for the rest of us. This e-book includes tips, best practices, and lessons learned from 10 Agile Marketing experts, including Jim Ewel (agilemarketing.net), Barre Hardy (CMG), and Rupert Laslett (Dell), to help your transition to Agile go as smoothly as possible. These experts cover topics such as how to:

- Choose the right Agile methodology for your team;
- Coach your team through the change;
- Organize and manage Agile teams; and
- Have a successful transition to Agile.

We hope this e-book will help you feel empowered to start implementing Agile Marketing practices with your team. Good luck!

CHOOSING THE RIGHT AGILE METHODOLOGY



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Andrea Fryrear is a confessed content marketing nerd, fervent Agile Marketing evangelist, and a certified Scrum Master and Product Owner. She is a firm believer in Agile's potential to help support her fellow content marketers with the long-term production of stellar content. You can find her detailed coverage of all things content and Agile at MarketerGizmo.com, which she edits and manages. Fryrear is also the author of the e-book, *Agile Marketing Styles: Your Guide to Finding the Right Agile Approach for Your Marketing Team*.



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If you've decided to take the Agile Marketing plunge, you've probably received training or read up on Agile. You've discussed it with management and have their buy-in. The next question is, now what do you do?

The very first thing you need to decide is which Agile methodology you should use to start managing your team's workflow. No need to belabor this decision; an important part of agility is being flexible in the way you apply the Agile Marketing principles. Pick one that seems like a good fit for your team, and then build on your successes (and learn from your failures) until you have the perfect custom methodology.

Scrum

In my experience, most teams begin with classic Scrum, which organizes work around iterations, or sprints, that typically run for two weeks. In Scrum, stakeholders bring projects to the team, and the Product Owner works with them to prioritize them into a ranked list called a backlog. The team decides which important backlog projects they can complete during the next sprint. Once a sprint begins, the team's priorities are fixed. Anything new that comes along must wait for the next sprint.

People typically start with Scrum because it has a lot of structure. If your team is not used to being self-organized or picking their work, Scrum helps to get their feet wet. By "structure" I mean that Scrum works through ceremonies that include sprint kickoffs, daily standups in which team members report what they are working on, and retrospectives to hash out what is working and what is broken. 



People typically start with Scrum because it has a lot of structure. If your team is not used to being self-organized or picking their work, Scrum helps to get their feet wet.



CHOOSING THE RIGHT AGILE METHODOLOGY

These teams include a Scrum Master, who makes sure everyone does what needs to be done from the Scrum perspective, a Product Owner who helps keep the team in line with larger strategic initiatives, and Agile team members.

In Agile Marketing, the Scrum Master often also acts as the Product Owner, but you can split this role across two people if you have a larger team. When my team first started with Agile, we were strictly Scrum, and it definitely helped for the people who were quite new to the process. We outgrew it pretty quickly, but it was a crucial transitional phase for us.

Kanban

Our next phase was Kanban, which is basically a less structured approach to Agile Marketing. Teams still organize work around a prioritized project backlog, and they often still incorporate ceremonies like standups and retrospectives. The main difference is that the team pulls work from the backlog at their own pace, rather than having it pushed toward them at set intervals. As soon as one project is done, work begins on the next available project in the backlog.

Managers and stakeholders have the responsibility of keeping the backlog properly prioritized. Most Kanban teams use a pretty simple workflow that relies on a backlog board showing things to do, work in progress, work that is done, and any other statuses you need to track. Each status column is governed by Work in Progress (WIP) limits that keep the team from taking on too much work at any given time.

On the surface Kanban is a more free-form way to create a lot of visibility around your marketing workflow, but it relies on an engaged Agile team that's committed to fixing process-related problems as they come up. It's also a little easier to adopt because there isn't quite as much educational overhead as Scrum. 

“The most important consideration in implementing Agile is that people don't get complacent in their process, and they continue to think critically about what is and is not working.”

CHOOSING THE RIGHT AGILE METHODOLOGY

Kanban works best for a team that is already used to picking their work and staying on deadline, and that doesn't need as much structure to guide them in their transition to Agile Marketing.

Scrumban

Some teams take a Scrumban approach, which is a little bit of Scrum mixed with a little bit of Kanban. Agile marketing teams often move in this direction once they become more comfortable experimenting with multiple Agile methodologies. For instance, they may add a timebox system to Kanban to strengthen schedule discipline. They may use sprints, but allow individual team members to draw work at will from a prioritized project backlog.

As Agile marketing teams become more proficient in their agility, it is important that they experiment with tools and methods until they find what works best for them. My team has been an Agile marketing team for a year and a half. During that time we've been through multiple different tools, a dozen unique designs of our board, and at least three ways to do standup.

In spite of this continuous adjustment of our process dials, we've maintained a non-negotiable commitment to daily standups and bi-weekly retrospective meetings. This helps us maintain communication amongst team members and stay focused on continuous process improvement.

The most important consideration in implementing Agile is that people don't get complacent in their process, and they continue to think critically about what is and is not working. ■

KEY ACTION ITEMS

- 1 The first step is to decide which Agile methodology you should use.
- 2 Do not belabor the methodology decision, because an important part of agility is being flexible in the way you apply Agile Marketing.
- 3 Daily standups and sprint retrospective meetings should be implemented as a non-negotiable part of any Agile process.

FINDING THE RIGHT PEOPLE IS MORE IMPORTANT THAN TEAM STRUCTURE



**JIM
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Jim Ewel is a proven growth leader who has run everything from a \$2 billion division of Microsoft to a three-person early-stage startup and a number of things between. He is also the leading blogger on the topic of Agile Marketing, and one of the co-organizers of SprintZero, which resulted in the Agile Marketing Manifesto.



When transitioning to an Agile Marketing workflow, I have found that there are several tasks a marketing group should do at the very outset:

1. Before launching an Agile Marketing initiative, there must be executive-level support from the organization, whether that comes from general management or from within the marketing and sales organizations.
2. Anyone managing an Agile Marketing practice needs training that is very specific to Agile Marketing. The team also needs to have an understanding of the principles of Agile workflow. Part of this initiation should include an open discussion about issues and challenges the team experiences that are leading them to Agile.
3. One of the team's first Agile action items is to appoint a Scrum Master. It is essential that this person have the right skills, which include being highly organized and having excellent people skills. A good Scrum Master influences without authority. This means influencing through persuasion and negotiation, not by using the force of the position. Once the Scrum Master is chosen, that person should have extra training. You also need to ensure that person is excited about the opportunity. You don't want that person thinking this is just one more thing they need to do on top of everything else they do in their regular job. 



A good Scrum Master influences without authority. This means influencing through persuasion and negotiation, not by using force of the position.



FINDING THE RIGHT PEOPLE IS MORE IMPORTANT THAN TEAM STRUCTURE

Some people assume that in addition to taking these first steps, it's necessary to reorganize the marketing team, but that's not so. Just making the transition to Agile is challenging enough, without throwing a re-org on top of it. If an Agile marketing team needs to restructure, it will become apparent over time as the team begins working through Scrums.

It's important to recognize that when you are transitioning to Agile Marketing, it's not just about training the existing team. It's also a good time to think about new people you bring onto the team. If you are building an Agile culture, there is an opportunity to hire people who are more likely to succeed in that kind of culture. What kind of people are best suited to work in an Agile environment? In my experience, people most suited for an Agile workflow are what is often referred to as T-shaped people, people who have not just a depth of knowledge in one area but also broad general knowledge.

The main reason for this hiring approach is the idea behind Agile being a self-managing team. When one person falls behind, someone else on the team needs to step up and help out so that the team gets everything done on time. You can't do that if everybody has just their own skill set and they can't fill in for anyone else.



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FINDING THE RIGHT PEOPLE IS MORE IMPORTANT THAN TEAM STRUCTURE

A good example of this is a company I helped transition to Agile Marketing. The marketing group had one person responsible for competitive intelligence. At the beginning of one Scrum, the team met with sales to find out the number-one thing sales needed over the next two weeks. It turns out what sales needed most was a lot of competitive intelligence, far more than their one competitive intelligence expert could deliver. This team discovered that in working in an Agile way, they all needed to understand more about competitive intelligence gathering.

As the marketing team works through Scrums, cross-trains its people, and begins to adopt true Agile Marketing practices, the need and requirements for restructuring will become clearer over time. ■

KEY ACTION ITEMS

- 1** When launching an Agile Marketing practice, get executive buy-in first, and then get Agile Marketing training for you and your team.
- 2** Do not begin by restructuring the team. The need to restructure will become apparent over time as the team begins working through Scrums.
- 3** When you build out the team, look for T-shaped people.

AN INCREMENTAL TRANSITION TO AGILE WORKS BEST



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David Lesue has worked professionally as a graphic designer/art director/creative director/interaction designer/user experience designer for the last 15 years. He has worked for Omniture, RiSER, Brigham Young University, and Adobe. David currently leads the efforts of the creative services team (Web, print, and video) as the Creative Director for Workfront.



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Many people decide Agile is the way to go, and they try to implement Agile Marketing all at once in a grand transformation. But that is a very painful way to implement Agile Marketing. Too many people walk away feeling Agile doesn't work for them.

A better approach to Agile is to introduce it iteratively. When we turned to Agile, we started by pulling in one piece at a time. Here's how we did it:

1. Create a backlog

First we created one consolidated backlog that held all the team's projects. Although we knew what we were working on, the entire team's workload was not consolidated in one place. We began by taking the attitude that if it's not in the backlog, it doesn't exist. This is not a big step because many teams have something similar already set up. It's a good way for the team to begin thinking in a coordinated way about their priorities.

2. Introduce sprints

Once our team was comfortable with the shared backlog, we introduced sprints, which involved a more iterative approach to our work. The length of a sprint depends on your team and the type of work you do. In our case, we adopted one-week sprints, but people should experiment with the length of sprints to find out what works best for them. >>>



People should experiment with the length of sprints to find out what works best for them.



AN INCREMENTAL TRANSITION TO AGILE WORKS BEST

Having used Agile before, and having worked as the creative director for a few months before rolling out this approach, I had a good sense that one week was going to be right for us, and it has worked out well. At the beginning, the team was not always accurate in estimating what they could get done in a week. As they became accustomed to the cadence of one-week sprints, they grew more disciplined about sprints as a framework for scheduling and completing work.

3. Incorporate sprint meetings

Soon after launching sprints, we started having a weekly sprint planning meeting, and then the sprint retrospective. We also added daily standup meetings to help stay on track with our sprints. However, some Agile practices we adopted in the beginning we later discarded. For instance, our team no longer does daily standups. The purpose of the daily standup is for the team to stay in close communication and for the Scrum Master to have complete visibility into all the work. However, a daily standup is not the only way to have that communication and visibility.



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Every couple of weeks, I would throw another chunk of Agile at my team. It was important that the things we were doing made sense to the team because they had never used Agile before.

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AN INCREMENTAL TRANSITION TO AGILE WORKS BEST

Every couple of weeks, I would throw another chunk of Agile at my team. It was important that the things we were doing made sense to the team because they had never used Agile before. It's also important to keep in mind this methodology was designed for developing software, so not all of it applies to marketing. For instance, as the team lead, I play the role of Scrum Master, but the role of Product Owner is more ambiguous. In software development, a Product Owner makes complete sense because that role represents the customer's interests. That situation is not the same in marketing, so the role doesn't translate as well.

In our case, our entire team works closely together and uses the same project management software that displays the team sprint board on everyone's computer screens at all times. At any given moment, everyone has equal access to the sprint status, which makes daily standups redundant. Agile methodologies are just tools to help your team get their work done more efficiently. As you adopt Agile methods, you should use the tools that work best for you. If some tools don't work for you, don't use them. ■

KEY ACTION ITEMS

- 1** Implement Agile Marketing methods iteratively. Start by pulling in one piece at a time.
- 2** Create one consolidated backlog that holds all the team's projects. Once the team is comfortable with this, you can introduce sprints.
- 3** Once you launch sprints, add a weekly sprint planning meeting and the sprint retrospective. Every couple of weeks, add a new chunk of Agile.
- 4** However, if you find that some Agile methodologies and tools don't work for you, don't use them.

COORDINATING MANAGEMENT OF SCRUM TEAMS



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Website

I come to this from the perspective that a core principle behind Agile Marketing and Scrum methodology is allowing teams to offer solutions and self-direct in reaching higher-level business objectives. In a traditional top-down, non-iterative approach to work, leadership provides vision and makes decisions about solutions, and then expects teams to implement those solutions. In an Agile workflow, leadership still comes forward with vision and essential objectives that need to be accomplished. The difference is the Agile team responds with what they can do to gain early results and to establish a starting point for further iterations.

Iterating requires a different management approach

This iterative approach to big business objectives requires a different style of management to really tap the creative power of a Scrum team and, at the same time, keep them focused on the right work. Scrum is a workflow methodology that breaks projects down into smaller, prioritized steps.

Senior business leaders are often unfamiliar with the cadence of Scrum workflows, and even in companies where IT and marketing teams use Scrum methodologies, the rest of the organization likely operates in a more traditional manner. 



Scrum Masters are the people who really protect the team and keep the team focused and executing its highest priority work. They are responsible for keeping the team efficient.



COORDINATING MANAGEMENT OF SCRUM TEAMS

Key team roles for Scrum

Two key team roles are essential for keeping Scrum teams efficient, aligned with high-level business goals, and provided with the coverage they need to get their work done: Scrum Master and Product Owner.

- **Scrum Master:** Scrum Masters monitor the Scrum cadence, remove obstacles, and coach the team on story writing and solutioning. Scrum Masters are the people who really protect the team and keep the team focused and executing its highest priority work. They are responsible for keeping the team efficient.
- **Product Owner:** This role is not always understood in the context of marketing, because it serves a different purpose than a Product Owner in a software development scenario. Some marketing organizations actually combine the Product Owner and Scrum Master functions. However in larger organizations that run several Scrum teams, the Product Owner sets the vision and direction for the team and acts as liaison between the team and the rest of the organization. Product Owners are the ones who understand the company goals and strategies, and they bring that understanding to make sure the team is working to the right priorities.



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Once a week, we get together with all the Product Owners and Scrum Masters to review what's happening on each team.

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COORDINATING MANAGEMENT OF SCRUM TEAMS

To be most effective, those two roles must work closely together. We have two Scrum teams that make up our digital marketing organization. Each has its own Product Owner, but they share the same Scrum Master. The teams have their own Product Owners because each team has its own specific areas of focus and its own goals. One team is all about customer acquisition, nurturing, and retention, while the other team focuses on website management and performance. Sharing a Scrum Master between these two teams works well because the work structure is right for it, and both teams are experienced *Scrummers*. We are lucky in that our Scrum Master is scrumming two teams that are somewhat dependent on each other. Even though the two teams have different focuses, sometimes they must coordinate their different tactics for the market. I have known Scrum coaches who have been Scrum Masters in the past that have scrummed four teams at a time. In those cases, the teams had been working together for a long time and were well-oiled machines.

To coordinate this activity between Scrum teams, all the Scrum teams work to a two-week sprint cadence, and each team does its own sprint meetings, sprint retrospectives, backlog grooming, and daily standups. However, we also do weekly *Scrum Scrums*, where we get together with all the Product Owners and Scrum Masters across digital IT and marketing to review what's happening on each team. This meeting gives everyone a broader perspective on their work and an opportunity to align their priorities with the larger business objectives. ■

KEY ACTION ITEMS

- 1 When two Scrum teams are experienced and there is a relationship between the work they do, those teams should share a Scrum Master.
- 2 Someone needs to set the vision and direction for the team and act as liaison between the team and the rest of the organization. This is the Product Owner's role.
- 3 When working with multiple Scrum teams, implement a weekly *Scrum Scrum* to give everyone a broader perspective and an opportunity to align priorities with larger business objectives.

THE ULTIMATE GOAL SHOULD BE A COMPLETELY AGILE SYSTEM



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Mike Lieberman started Square 2 Marketing, the largest purely inbound agency on the planet, in 2003 with his business partner Eric Keiles. Today, the firm is HubSpot's largest partner, and they have mastered how to use inbound to drive client results and how to use Agile Marketing and Scrum to deliver even better client results. In the process, they have improved team member happiness across their agency.



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An Agile workflow can help almost any marketing organization, and for marketers who are serious about inbound marketing techniques, an Agile workflow is practically mandatory. I have found that Agile is just about guaranteed to increase results, and leads to a happier and more productive marketing team. If you have aggressive goals for your inbound marketing program and you're looking for your team to be high performing, an Agile workflow provides the magic piece that you need to deliver strength and superior results.

The key to successful Agile implementation

To be successful, implementing an Agile workflow takes transparent planning, discipline, and team member buy-in. Implementing an Agile workflow should come only after a team is clear about their marketing goals in general. It is an execution technique, not a marketing strategy. When your inbound marketing strategy is solid and you know what to say, then you can figure out the proper tools to say it and connect all the dots. Those tools have to be in place before you get into execution, and it's in execution where Agile excels. 



It's not really about the Agile methodology and it's not about the velocity of the team, it's about the business results—that is what you need to focus on and continue to look at.



THE ULTIMATE GOAL SHOULD BE A COMPLETELY AGILE SYSTEM

Without making the implementation process daunting, I do highly recommend formal training in Agile techniques when possible. Scrum training is worth it because you need to understand Agile techniques and then adapt that methodology for marketing. For some teams this may include hiring an Agile consultant who can teach them the rituals that will help them make changes and better understand the metrics that an Agile workflow provides. You have to understand how to use Agile, you have to understand how to track success, and you have to understand the concept of collaboration. Using Agile is a much different experience than what goes on in traditional marketing departments, where each person is managing their own little area.

The benefits of Agile Marketing

One of the key selling points for implementing an Agile workflow is the team member happiness component. If you have people who are a little complacent or routine and the execution of marketing strategy has gotten vanilla, Agile can provide them with a much better professional experience and make them happier, so there can be a lot of wins. Not everyone is adaptable to the Agile methodology, though, so the implementation of Agile can be a double-edged sword, as it may require some team changes. Successful implementation requires that the team understands why such a move will result in better outcomes, and plenty of upfront discussion before making any dramatic changes. 

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Marketing is a science now, not an art, and Agile helps everyone understand and measure that science.
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THE ULTIMATE GOAL SHOULD BE A COMPLETELY AGILE SYSTEM

Focus on business results

The thing that a lot of Agile practitioners remind me is that it's not really about the Agile methodology and it's not about the velocity of the team, it's about the business results—that is what you need to focus on and continue to look at. Accordingly, when implementing an Agile workflow, I strongly suggest measuring internal teams on specific business results and then helping them understand why Agile methods will assist them in better delivery of those outcomes.

Implement at your own pace

Implementing an Agile process for marketing takes time, but eventually it should be a complete move. I don't think you should do this halfway, but every team has to implement at their own pace. In the best-possible scenario, once a team is confident of their overall marketing strategy and already executing it well, that team should take a month or two to learn about Agile, discuss it internally, and build a plan. It will likely take a quarter or two to start implementing Agile techniques. Fully understanding the results might take a couple more months to master—it's not the kind of thing you execute in a couple of weeks. And there are a lot of team dynamics involved so you're going to have to face some of those considerations as you start to move to an Agile workflow, which can complicate things, as every team member is unique. But the results, especially when practicing inbound marketing techniques, are well worth it. Marketing is a science now, not an art, and Agile helps everyone understand and measure that science. ■

KEY ACTION ITEMS

- 1 One of the key selling points for implementing an Agile workflow is the team member happiness component — if people have gotten complacent, Agile can provide a much better professional experience, so there can be a lot of wins.
- 2 When implementing an Agile workflow, I strongly suggest measuring teams on specific business results and then helping them understand why Agile methods will assist them in better delivery of those outcomes.
- 3 Successful implementation requires that the team understands why the move to Agile will result in better outcomes, and plenty of upfront discussion before making any dramatic changes.

HOW TO MANAGE THE CHANGE OF AN AGILE TRANSITION



**RAEHEL
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First, let me just say that if you're thinking about or planning to adopt Agile Marketing on your team, yay! I'm excited for you. Agile Marketing is a particular passion of mine because I've seen what a difference it can make for marketers. I believe that we, as marketers, too often get stuck in the rut of the way things have always been done and the "but that's the way we've always done it" mentality. Unfortunately, that type of thinking has led many of us into tedious processes that make it exceptionally difficult for us to get our messages and campaigns to market as quickly as we need to. I have personally led or been involved in marketing campaigns that start out as an exciting big idea, but once all of the planning and replanning are done and the hoops are jumped through, the campaign takes two quarters (or more!) to release. By the release date, we have not only lost the initial excitement but also may have missed our ideal moment in the market.

In today's rapid-paced and social world, six-plus months to deliver just doesn't work anymore. Agile Marketing provides the workflow framework and mentality shift that allows marketers to get their work to market faster, by working more iteratively and by continuously testing and improving their work. It's truly a new way of thinking about work that is helping marketers feel more modern and renew their excitement about work.



Agile Marketing is truly a new way of thinking about work that is helping marketers feel more modern and renew their excitement about work.



HOW TO MANAGE THE CHANGE OF AN AGILE TRANSITION

Here is my advice to anyone who's thinking about going Agile:

- **Believe that you can—and should—do this.** It sounds silly, but if you're trying to make this change while you're still skeptical about it, you might be setting yourself up to fail. If you need to take time to do more research or talk to more people who have experience with Agile, then do it. Changing the way you and your team think about, manage, and do your work can be a daunting thought—especially if you haven't really bought in yet.
- **Remember that you don't have to change everything at once.** The beautiful thing about Agile Marketing is, it's *agile*. So unless you want to, you don't have to change everything at the start. You can begin by forming Agile teams and setting up a backlog for each team. Then give them a month or two to get used to the new format. Next, start getting into the habit of daily standup meetings to talk about progress and roadblocks. After that, start incorporating sprints and let your Agile teams experiment with different sprint lengths until they find what works for them. If you're not comfortable with going all-in all at once, you can find an incremental plan that works for your team. No sweat.
- **Get your team onboard and jazzed about Agile first.** It's always difficult to incorporate big changes when your team is blindsided by them. So don't make this decision on your own. Sell it to your team first. Get their feedback. Hear their concerns. Help them see why this change is positive and valuable for them. Then, as a team, plan a launch event that everyone can get excited about. Maybe it's bringing in lunch, or going out to lunch, or planning a party around your first sprint planning meeting. Maybe everyone brings in their favorite treat to share and you find a conference room and play some fun music. Be creative and keep the team involved. It will help them buy into Agile too. 

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The Agile mindset and a focus on Agile principles have the power to transform the way marketers perform.
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HOW TO MANAGE THE CHANGE OF AN AGILE TRANSITION

- **Designate at least one person on your team as “expert.”** It’s not necessarily important that everyone on your team be well-versed in Agile Marketing practices and terminology. Realizing this truth is usually a relief for marketing teams. Really, you just need to designate one person on your team to research Agile and perhaps attend a training or certification course. That person can then help your team understand how the Agile framework or methodology you’ve chosen works, and they can be the point person for any questions the team may have. This approach lifts the burden of learning a whole new work language off the shoulders of the entire team.

I truly believe Agile Marketing is the now and the future of marketing work management. The Agile mindset and a focus on Agile principles (such as valuing the customer experience first) have the power to transform the way marketers perform. In fact, data suggests that marketers who embrace Agile see fantastic results:

- 93 percent of marketers who have adopted Agile said it has helped them to improve speed to market (ideas, products, or campaigns)
- 93 percent said Agile helped them switch gears quickly and more effectively
- 87 percent said Agile made their teams more productive
- 80 percent said Agile led to enhanced prioritizations of the things that matter
- 80 percent said Agile helped them deliver a better, more relevant end product¹

With those kinds of results, how can Agile not be worth it? ■

¹ <http://www.forbes.com/sites/jenniferrooney/2014/04/15/applying-agile-methodology-to-marketing-can-pay-dividends-survey/#7fdf317391e1>

KEY ACTION ITEMS

- 1** Research Agile Marketing until you truly believe in its transformative powers, then work with your team to develop enthusiasm for the new methodology and an implementation plan.
- 2** Designate an “expert” on your team who has learned the method and can teach others.
- 3** Adopt Agile Marketing practices in steps that are digestible for your team rather than undertaking a wholesale methodology change.

ALL MARKETING WILL BE AGILE BY 2020



**JASCHA
KAYKAS-WOLFF**
Chief Marketing Officer,
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Jascha Kaykas-Wolff believes in two key principles: Find opportunities where no one else is looking, and never fail the same way twice. This methodology is centered on Agile Marketing practices and marketing technology. Kaykas-Wolff is currently the chief marketing officer (CMO) for Mozilla; was CMO for BitTorrent, Mindjet, Involver, and Webtrends; and has experience at Microsoft and Yahoo! He published *Growing Up Fast* with Kevin Fann in August 2014 and launched Growthverse with Kobie Fuller in June 2015.



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I'm passionate about Agile Marketing and believe in it so strongly that I predict in a few short years, Agile practices will be so ubiquitous that Agile Marketing will just be called "marketing." I don't make this prediction lightly—I've seen the results that Agile techniques have brought to some of the world's most impressive marketing organizations and how Agile practices are essential in today's world of data-driven, fast-paced, and highly direct communication between audience and company. But getting to a world where Agile techniques become the norm is not without challenges and requires discipline and proper communications. Here are my recommendations:

1. Understand the difference between Agile software development and Agile Marketing

It is critical that everyone understand that Agile software development and Agile Marketing are not the same thing. The expectations of the marketing team and what they practice in Agile are different than those for a development team; you have to be careful not to use the same language, or expectations may be set incorrectly. If you are going to include training as part of adopting Agile techniques, I recommend you seek out Agile training specifically from agencies and coaches that specialize in marketing, not product development. This helps you avoid becoming mired in definitions rather than focusing on solutions. I am encouraged by the fact that such training now readily exists, as does a tremendous body of educational material, including Agile Marketing books, blogs, and other resources.

2. Get Scrum certified

I think it is incredibly valuable for the program and project managers in the marketing organization to become Scrum certified. However, Scrum certification, though it can give you amazing context, isn't going to give you the full tool kit for marketing. That will come from experience. >>>



I've seen the results that Agile techniques have brought to some of the world's most impressive marketing organizations and how Agile practices are essential in today's world.



ALL MARKETING WILL BE AGILE BY 2020

3. Get buy-in from the right people

I also believe that any effective implementation of Agile Marketing practices requires full buy-in from management, especially the C-suite and finance departments, which still tend to think in terms of annual review cycles and can sometimes be rigid and slow to adapt. The first step to gain management buy-in for any idea is to make sure that you are talking in a language they understand. Approaching the management team and saying, "I'm going to use an Agile system," is not going to help you. A better approach is to demonstrate why change and change management are necessary for the marketing organization and then position an Agile system as the best way to facilitate that change.

4. Be willing to adapt regularly

Finally, it is critical to remember that Agile isn't a doctrine; it's a playbook that requires constant adaptation. Agile is a system that needs to be adjusted. If anyone tells you there is a specific discipline that you must follow religiously for something to be Agile, they either don't understand Agile systems or have been incorrectly taught Agile. ■

“If anyone tells you there is a specific discipline that you must follow religiously for something to be Agile, they either don't understand Agile systems or have been incorrectly taught Agile.”

KEY ACTION ITEMS

- 1 Understand that Agile software development and Agile Marketing are not the same thing.
- 2 Agile is a system that needs adapting and modification to work effectively, so don't become mired in rigid techniques and in following an inflexible set of practices.
- 3 Communicate the importance of the Agile system to C-level management in a way that focuses on process improvement, not on Agile techniques, which they may not completely understand.

ADAPT AND BE FLEXIBLE, ESPECIALLY WITH LARGE TEAMS



**RUPERT
LASLETT**

Scrum Master,
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Rupert Laslett has a wealth of experience implementing change to improve organizational performance. With more than 20 years as a seasoned expert in project, change, and process management across industries as diverse as oil and gas, retail, technology, and pharmaceutical, he has been a leader, strategist, and participant in small team Agile startups. Laslett is a truly adaptable individual who can apply his management skills and knowledge to any environment to effect real change.



I am not a marketer by trade—my background is in project and process management—so I knew when I was asked to implement an Agile Marketing process, modifications would be necessary to accommodate the nearly 200+ people in the software marketing group. We chose the Scrum method for its popularity and available external training, which we do three times a year to accommodate typical turnover in such a large team. Here's what we did to make our transition successful:

1. Modify Agile terminology

We determined immediately that certain terminology and language required modification to work in marketing, as some of the most basic definitions, such as the word “product,” have different meanings for marketing than they do for a software development team. We modified the basic frameworks to align with marketing terms.

2. Adjust the cadence to work for your situation

We have larger teams than Agile best practices recommend. The multidisciplined requirements of our marketing deliverables result in teams that are usually more than double that of typical Agile implementations—15 or more members. >>>



Where a typical Agile method involves daily Scrums and weekly sprints, we found that this timeframe doesn't work for our marketing deliverables. Instead, we have a weekly Scrum and monthly sprints.



ADAPT AND BE FLEXIBLE, ESPECIALLY WITH LARGE TEAMS

This setup results in different challenges than a traditional Agile team face, and we had to adjust the cadence of Agile to accommodate these challenges. Where a typical Agile method involves daily Scrums and weekly sprints, we found that this timeframe doesn't work for our marketing deliverables. Instead, we have a weekly Scrum and monthly sprints to enable our team to build and deploy campaigns and programs continuously.

This longer process means that unanticipated work might need to move in and out of a sprint—about 20 percent of projects in a given sprint may not have been planned. Also, other types of projects take too long to be contained in a single sprint, so we move them forward in a continual process. A good example is video work, which cannot be completed in one sprint because the work required runs over a month-long process. So we spread a 90-day campaign that involves video over three sprints. For example, the first sprint addresses outlining, writing scripts, and generating copy. The second sprint involves filming and production, and the third sprint entails post-production tasks and the campaign launch.



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With Agile, everything is prioritized. Teams know the total duration of the sprint, so they focus on the high-priority work at the beginning of the sprint and are much more organized.

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HOW TO MANAGE THE CHANGE OF AN AGILE TRANSITION

3. Keep flexible processes

Our process must also be flexible. We might be 15 days into a sprint and have a load of work turn up that we must get done to take advantage of a marketing opportunity, such as an event, and we can't push out the work because the event is fixed. Those projects become part of an existing sprint. As a result of this type of workflow and because you need someone to continuously guide and facilitate the process, we definitely had to establish separate roles for Product Owner and Scrum Master. Marketers are not always great at staying inside the process guidelines and boundaries, so the Scrum Master role became important to keep the machinery of Scrum working. As the Scrum Master, I would like to see our team size reduced, as it's difficult to run weekly Scrum calls with 22 people for an hour and a half. However, we have to be geared this way for the moment as there are too many specializations within the teams to make them smaller.

Team size aside, the sprint method has greatly helped with prioritization. Before, the model was first-in, first-out. Folks in groups such as shared creative services didn't know whether what they were working on was fantastically critical or just nice to have. With Agile, everything is prioritized. Teams know the total duration of the sprint, so they focus on the high-priority work at the beginning of the sprint and are much more organized. ■

KEY ACTION ITEMS

- 1 **Modify terminology and language to work in marketing; some of the most basic Agile Marketing definitions mean different things than they do to a software development team.**
- 2 **Establish separate roles of Product Owner and Scrum Master because you need someone to continuously guide and facilitate the process.**

RIGHTSIZING SPRINT WORKLOADS



**BRANDON
JENSEN**

Director of Marketing
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Brandon Jensen is a seasoned operations leader who has served in various marketing, sales, and order processing operational roles with Workfront and Novell. His current role as the director of marketing operations for Workfront allows him to work with the things he loves: systems, processes, and data. He gets his kicks out of solving problems through data analysis, brainstorming processes on whiteboards and, at home, playing the role of human jungle gym with his kids. He holds an MBA and bachelor's degree from Brigham Young University.



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A big challenge for many teams just starting out with Agile is estimating tasks and taking on an appropriate sprint workload. There are many reasons this is so difficult in the beginning. It requires looking at the work differently, accurately estimating the time required to complete each task, and dealing with unanticipated requests. When we adopted Agile Marketing, we learned early on that to succeed, we had to right-size our work requests. Here's what I mean by that:

1. Break work down into smaller tasks

One of our early revelations was discovering the way we assigned projects simply did not work for the one-week sprint cadence we adopted. In the old workflow, some tasks would be assigned to multiple people and might last for three weeks. We had to break project work into tasks that could be completed in a few hours, and we needed to be able to clearly assign one person to one task. In this way, we could organize the work into tasks we could fit into a sprint. 



We had to break project work into tasks that could be completed in a few hours, and we needed to be able to clearly assign one person to one task.



RIGHTSIZING SPRINT WORKLOADS

2. Revisit project templates

Breaking work down into smaller pieces also meant redesigning all our work templates in our project management tool. Every kind of work we do, whether it's a webinar, trade show, or digital program, has its own project management template with all the tasks that must be completed for that project. When we redesigned the task set for one-week sprints, we also had to redesign those templates. This redesign required working with other marketing teams to make sure the template format was correct. That way, work requests would flow right into the Agile process of our team.

3. Accommodate for emergency requests

Another challenge was dealing with ad hoc and fire-drill requests. Scrum purists might say once everyone agrees to that week's sprint, anything else that comes up must wait until the next sprint. That approach is simply not realistic in a marketing environment where something completely off the radar on Monday becomes everyone's top priority on Wednesday, such as a broken website. We know requests will come in that must be dealt with, so at our weekly sprint meeting, we allocate only 50 percent of each person's time to sprint tasks. As the week progresses, new high-priority requests get entered on the sprint board and assigned to someone. By the end of the week, most people have 75 percent of their time allocated to sprint activities that will be completed in that sprint. If something really big and critical comes in, it may bump a scheduled sprint activity. Then we have to look at the bare minimum of what must be done in that sprint, and we make decisions about what gets moved to the next sprint. 

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Looking ahead three sprints is about as far as we can see, because if we try to do more than that, by the time we get there, everything has changed.”

RIGHTSIZING SPRINT WORKLOADS

4. Meet regularly to discuss work

We run two kinds of weekly meetings to prioritize and allocate work. In a weekly team meeting that also covers non-sprint-related issues, we look at the project backlog and prioritize tasks into the next three weeks of sprints. Looking ahead three sprints is about as far as we can see, because if we try to do more than that, by the time we get there, everything has changed. We also have a separate weekly sprint meeting in which we commit to specific tasks for that week's sprint. In the sprint meeting, we combine the sprint meeting and the retrospective look at what happened in the previous week and what's coming up in the current week. Between the weekly team meeting and the weekly sprint meeting, we are able to keep an eye on the big picture while committing to the highest priority tasks for the current week's sprint. ■

KEY ACTION ITEMS

- 1 Break project work into tasks that can be completed in a few hours and can be clearly assign to one person.
- 2 In sprint planning, start by allocating 50 percent of time to sprint tasks and leaving room for unexpected requests that may suddenly become top priority.
- 3 Don't try to plan too many sprints in advance, because by the time you get there, everything will have changed.

USING AN AGILE TRANSITION TO RETHINK TRADITIONAL MARKETING



BARRE HARDY

Associate Partner,
Performance Practice,
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Barre Hardy leads CMG's marketing performance practice and developed the firm's Agile for Marketing (A4M) solutions. She has more than 15 years' experience working with Fortune 100 companies to meet objectives through strategic development, implementation, and operationalization of marketing strategies. Before CMG, Hardy worked at General Electric as a marketing manager and participated in the prestigious Experienced Commercial Leadership Program as a Six Sigma black belt. Hardy holds an MBA from the UCLA Anderson School of Business.



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Adopting an Agile Marketing mindset and methodology is a way for marketing organizations to rethink how they create value for their customers. For many businesses, part of this approach is recognizing that creating greater value for customers also creates greater value for the business.

Most marketing teams transitioning to Agile are already operating from a plan of some kind. Many begin by simply putting their existing plan into a backlog and adopting the new Scrum processes as they work through that plan. From my experience, doing this gives you efficiency and go-to-market improvement. However, it does not give teams the step-change performance improvement they are looking for in moving to Agile, as they aren't fundamentally changing the work they are doing. The goal should be to become proactive about creating customer value. This often involves rethinking both what the team is chartered with doing and how the team is structured to support those objectives.

Start by assessing your current plan and alignment

The best place to start with Agile is to look at what you are trying to achieve as a marketing organization, define your goals and priorities, and determine how best to align the team(s) with those objectives. This often involves bringing the right cross-functional team and lens to a problem to help you create value for the customer. This customer value ultimately translates to value to the business, in the form of increased revenue and customer lifetime value. 



The transition to Agile is an ideal time to step back and assess whether your current plan is the right plan.



USING AN AGILE TRANSITION TO RETHINK TRADITIONAL MARKETING

The transition to Agile is an ideal time to step back and assess whether your current plan is the right plan. I have clients who set up their team and then realize as they begin to define their first sprint that they don't have enough information to know which customers are most important to the business, and what activities are most critical to creating value for those customers. Defining and prioritizing the work in the backlog goes back to elemental questions:

- Who are the most important customers?
- What needs do they have?
- How well are we addressing their needs?
- What parts of our customer experience need the most work now?
- What data do we have to support these work decisions?

One way to begin is to set aside a specific amount of time during the first few sprints, say 25 percent of each, to research elemental marketing questions that will help define and prioritize work. In the absence of data to provide a true understanding of these basic questions, begin with hypotheses and use the Agile process to prove or disprove how value is created. This research can be undertaken while other essential marketing work continues.



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Establishing an Agile Marketing practice involves seeing how the team interacts with other organizations in the business, and then designing Agile teams to address the points of friction.

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USING AN AGILE TRANSITION TO RETHINK TRADITIONAL MARKETING

Identify possible handicaps

While you are rethinking your current marketing plan as you transition to Agile, you should also consider deeper structural issues that may handicap your Agile methods. I have found that what the business wants to do often trumps what the customer needs from the company. Thus, priorities are being set based on business operational drivers instead of customer value drivers. Ultimately, you want teams focused on those that drive both.

Most marketing organizations have points of friction within the marketing organization or in how marketing works with other groups. These points can be areas of misalignment between channels and the teams that support them, teams that are not collaborating well, or business units that have poor lines of communication with marketing. Agile Marketing works best through greater integration, collaboration and transparency. Part of establishing an Agile Marketing practice involves seeing how the team interacts with other organizations in the business, and then designing Agile teams to address the points of friction. ■

KEY ACTION ITEMS

- 1 When you start with Agile, look at what you are trying to achieve as a marketing organization.
- 2 In the first few sprints, set aside 25 percent of each sprint to research elemental marketing questions that will help prioritize the backlog.
- 3 Structure Agile teams to reduce points of friction with the larger business organization.

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