The Advanced Guide to Agile Marketing

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Introduction

Agile Marketing is quickly becoming the most talked about approach to managing marketing work—and for good reason. Unlike traditional, rigid project management methodologies, Agile Marketing allows marketers to work in short, flexible bursts of work and provides team-wide visibility into workloads and efficiency— exactly what is needed for marketers to meet the demands of today's fast-paced digital environment.

If you're reading this guide, it's probably because you're a marketing professional who has some experience with the Agile Marketing methodology, whether through the Scrum, Kanban, or Modified Scrum frameworks. This guide will assume you are familiar with Agile terminology, have successfully run sprints or a Kanban structure with your team, and are ready to dig a little deeper into Agile Marketing and its potential benefits.

If Agile Marketing is new to you or you need a refresher on some of the terminology, you can refer to our *Complete Guide to Agile Marketing* for more introductory information.

Agile Marketing Principles

Before we dig in, it's good to have a reminder of what Agile Marketing stands for and aims to accomplish. Consider Jim Ewel's version of the Agile Marketing Manifesto:

> *Agile Marketing is an approach to marketing that takes its inspiration from Agile Development and that values:*
>
> - *Responding to change over following a plan*
>
> - *Rapid iterations over Big-Bang campaigns*
>
> - *Testing and data over opinions and conventions*
>
> - *Numerous small experiments over a few large bets*
>
> - *Individuals and interactions over target markets*
>
> - *Collaboration over silos and hierarchy*
>
> *The goals of Agile Marketing are to improve the speed, predictability, transparency, and adaptability of the marketing function.*[1]

As you attempt to learn more about and dive deeper into the Agile Marketing methodology and its marketing-relevant frameworks, keep these principles in mind. The more Agile you desire to be, the more you will have to allow yourself, and your team, to think about and organize your work and workflows differently to adjust to this way of thinking.

Taking Agile To The Next Level

If your team is already applying some Agile methodology to your work, it's likely that you've taken a slightly modified approach to one or more of the Agile frameworks. You may even be successfully employing a mixed-methodology approach (e.g., planning projects in Waterfall, but executing in sprints).

In order to take your Agile experience a little further you will need to be willing to change a few more things, such as:

- Focus on sprints instead of hard deadlines

- Being willing to restructure your team for greater success

- Rethinking your mixed-methodology approach

- Considering allowing your team members to self-commit to work

- Considering allowing contributors to self-select their agile teams

If some of these things seem hard to do or make you feel as if you'll be giving up too much control, don't worry—we'll help you see the benefits of further embracing Agile principles, and we'll walk you through how to make these changes effectively later in this guide. But first, let's look at how you may want to organize your Agile Marketing teams.

Applying Agile to Your Marketing Teams

There are typically two main ways that marketers choose to apply the Agile methodology: on a project-by-project basis or through functional teams. Let's take a closer look at how this is done.

① Agile Marketing on a Project-by-Project Basis

Most marketing organizations have competent and intelligent project managers or campaign managers who assemble teams to manage one or two large marketing projects at a time. Many Agile marketing teams only choose to apply Agile principles, as needed, to these larger projects. They develop cross-functional, Agile teams of people who work on the project as just one aspect of their daily responsibilities. They then fashion sprints around achieving project milestones and they iterate on the project until it is complete.

② Agile Marketing as a Functional Team

This option applies especially well to marketing teams that tend to fall into the "shared services" category, such as creative services, video production, or marketing operations. These teams often receive large amounts of work requests from others within the marketing department, and/or several other business units within the company. They choose to manage all of their work requests and strategic work using Scrum, Kanban, or Scrumban frameworks, largely letting go of hard deadlines (but certainly making exceptions when necessary) and working on whittling down a never-ending backlog with each successive sprint.

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Diving Deeper into Scrum

To take full advantage of Agile Marketing, you'll need to be willing to let go of your traditional project management habits and beliefs, step out of your comfort zone, and more fully embrace an iterative way of working. It's also essential to secure leadership support. In fact, 88 percent of marketers say senior leadership buy-in is imperative to an Agile rollout.[2]

So before you tackle these additional Agile tactics, make sure you have the executive support you need and that you and your team are mentally ready to let go of old habits and beliefs.

Scrum for Functional Marketing Teams

Let's first look at how you can delve further into Agile Marketing when working as a functional team, where your work focuses on a specific activity rather than a project or campaign:

1 Focus on sprints instead of hard deadlines

Some marketing tactics, like the ones you might find on a content calendar, should keep their hard deadlines. But unlike traditional Waterfall methods where you start by assigning deadlines to each task, in a truly Agile Scrum model, you plan deadlines around sprints. With this approach, you start by placing tasks or stories in the backlog. Then, each sprint addresses the highest priority tasks—those at the top of the backlog. This allows your team to be more flexible to changing needs on a day-by-day basis. When there are hard deadlines, make sure you have a system in place to ensure that these tasks are in your backlog early enough that you can add them to the correct sprint to meet the deadline. Additionally, make sure that you communicate your sprint timelines to requestors so they know when they need to make requests to ensure their deadlines are met.

For example, if your team is responsible for all creative services, you likely have a long list of requests, such as designing a trade show banner, creating a landing page mockup, or designing a new product label. Rather than assigning all of your deadlines for each of these tasks when they are first requested (as you would in the Waterfall methodology), use the start of each sprint to assess your backlog of task/stories and determine which are the highest priority. This allows your team to adapt as needed and prioritize the backlog and each sprint according to what is most urgent at the moment.

2 Be willing to restructure your team for greater success

Flatten your team by eliminating traditional hierarchy. Otherwise, you can't truly avoid Waterfall. For functional teams, this works best when each Agile team is made up of people with similar roles, where anyone can conceivably work on any of the tasks in the backlog.

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To make this work, start by assigning each individual primary and secondary roles according to their skill sets. Individual team members can have many roles, such as the ability to write, copy edit, and approve copy. What's important is that all the members within an Agile team can complete any task within the sprint and that the roles assigned reflect what individuals do, not their standing within the organization.

When the perception of hierarchy is removed, a team can better own things collectively and work from an even playing field. Team members see each other as peers, creating an environment where every team member has an equal voice in giving and receiving feedback. While some may be concerned that removing the traditional hierarchical structure for career growth can be limiting, the opposite is true. Instead of focusing on titles, team members can push themselves to continually expand their knowledge and expertise in areas they are interested in. And as an organization, the focus should be not on rewarding titles, but on rewarding good work and the growth of skills.

3 **Rethink your mixed-methodology approach**

While a mixed-methodology framework is certainly better than straight Waterfall, your team can benefit further with a true Agile approach. No more Waterfall—not even Agile elements placed within a Waterfall structure.

Moving completely to Agile can seem daunting because it requires giving up control of hard deadlines as well as what work gets done and who will work on it. Working solely in Agile pushes teams to change their mindset and begin not just working iteratively, such as through short sprints, but to think differently about their entire approach to work.

Agile Marketing means accepting that work will be produced in smaller bursts and then built upon. It means committing to trying new ideas, testing, and retooling as needed. And it means accepting a pull rather than push relationship, where individuals and teams choose the work rather than management assigning it.

4 **Consider allowing your team members to self-commit**

In traditional project management, managers assign tasks to individuals or teams. However, a big part of Agile Marketing is allowing for a more self-directed manner of managing work. Instead of managers assigning work, allow team members to review the backlog and self-commit to stories in your daily stand-up meetings.

One of the benefits of allowing team members to self-commit is it empowers them to choose work they find interesting and engaging, which in turn helps improve individual performance. In a Gallup study, researchers found that those scoring high in employee engagement outperformed those with low employee engagement scores by 10 percent on customer ratings, 22 percent in profitability, and 21 percent in productivity. A benefit of the Agile structure is that it creates an atmosphere of high engagement, which further increases employee productivity.

5 **Consider allowing contributors to self-select Agile teams**

As part of embracing Agile completely, it may also be time to give up control around how Agile teams are created. There are many different ways that teams can be formed. They can be permanent teams formed around a specific service or teams that form only for a period of time to work on larger projects or to address specific problems that need solving.

For example, a team may be functional and focused solely on keeping the website up-to-date. Or, a team may be focused on solving a problem such as high shopping cart abandonment. In either case, the teams should self-organize around the roles that would be best suited to what they are trying to accomplish.

Scrum for Marketing Project Teams

While project-oriented teams differ from functional teams in that they require multiple types of roles to achieve the end goal, many aspects previously discussed for functional teams still pertain to project-focused teams. The biggest difference is that project teams tend to be more iterative in their approach.

Drawn from the world of product development, project-based teams seek to produce a minimum viable product (MVP) in a sprint. A MVP is a product which has just enough features to gather valid feedback about the product. For marketing teams, an MVP doesn't necessarily need to be a product—it can be a campaign, asset, webpage, or mobile app.

There are two main differences between using the Scrum framework for a functional team, like content marketing or creative services, and using Scrum for a project or campaign team:

1 **The nature of the team:** Project teams are typically made up of individuals who belong on various different marketing teams, but are coming together to work on an integrated campaign or special project. These team members will only be able to allocate a certain amount of hours per week to the project because they will still have their daily responsibilities and work to manage.

2 **The structure of the work:** Instead of managing all of the team's work using the Scrum framework, a project team is only managing the tasks related to that project using the Scrum framework. Because project work is by nature more structured, the Scrum application looks a little different.

CONTENT MARKETING TEAM   CREATIVE TEAM

MARKETING
PROJECT TEAM

WEB TEAM   DIGITAL MARKETING TEAM
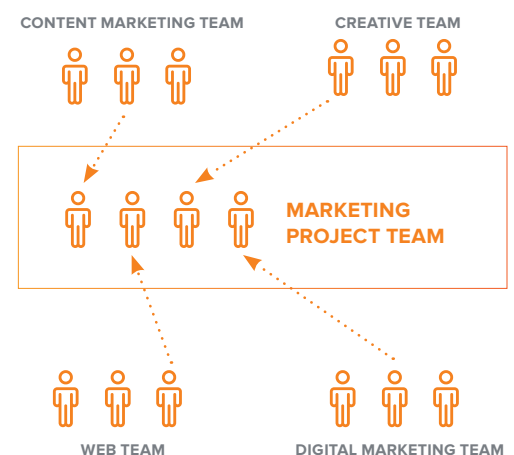
Here's a closer look at how managing projects with Scrum works:

- **Determine the project and form your team:** Make sure you have a clear understanding of the tasks and skills required to complete the project. For example, if you were undertaking a rebranding campaign, you would want to define all of the facets and skills needed for the campaign so you could ensure that you had the right talent on the team to create several concepts, write copy, design a logo, revamp the website, and so forth.

- **Define the Minimum Viable Product (MVP):** Instead of planning sprints around project milestones (the mixed-methodology approach), plan sprints around producing a minimal, yet acceptable, version of your campaign. This way, if you're working in a two or three week sprint, the most minimalistic version of your campaign goes to market quickly, instead of taking six months to launch. The next sprint you do will be around producing the next, improved version of your campaign as quickly as possible, based on customer experience and feedback.

- **Put all project tasks into your backlog:** Instead of giving each task a hard deadline, simply put all tasks into your backlog according to their priority. For example, an Agile rebranding campaign would not have individual deadlines set for each task as is typical in Waterfall. Instead, tasks or stories would be committed to by the project team as determined by their priority in the backlog and their pertinence to delivering the next MVP by the end of the sprint.

- **Set your sprint length:** The length of your sprint is determined by the tasks and time required to create a minimum viable product. In the example of a rebranding campaign, if your MVP is a concept that you intend to test in a focus group, you would want to make sure your sprint allows enough time to develop the concept to the minimum level at which it could be beta tested.

- **Test your MVP:** Once the sprint is complete and you have a product, you need to gather data on your MVP so you know what improvements you can make. If you created a concept for your rebranding campaign, you'll want to make sure that your control group is large enough to give you statistically valid feedback on the concept. Make sure the feedback is also detailed enough that you can understand what should change and what should remain.

- **Organize a new sprint and create the next version of your MVP:** Now that you have feedback, you can focus the next sprint on how to improve your MVP or take it to the next level. In the rebranding campaign example, perhaps the second sprint is around turning your concept into a physical deliverable.

What's important to remember about Agile project teams is that at all times the team's focus remains on speed to market, continuous improvement, and constant customer testing. However, similar to functional teams, project teams will be most successful when they are allowed to be self-directed, choosing who they work with and what projects they work on.

Diving Deeper into Kanban

Once you're familiar and comfortable with the Scrum framework, you can start getting more creative and explore with different Agile structures. Kanban, for example, is similar to Scrum but doesn't operate in sprints. Instead, it focuses on continuous releases of work.

Kanban derives from a Japanese word that translates to signboard or billboard. In the 1950s, Toyota developed a system to improve manufacturing efficiency that used visual markers to indicate resource levels, thus queuing production rates. They called the system "Kanban."

At its core, Kanban is an Agile framework, dependent on visual queues that says demand goes before supply. Kanban quickly became ubiquitous in the manufacturing industry and is now elemental in just-in-time (JIT) and lean manufacturing.

Decades later, software developers have adapted Kanban to their processes and added it to the list of Agile practices. Developers' version of Kanban consists of a central storyboard with sticky notes (or a digital equivalent) representing work items––often called stories. The board is divided into columns indicating a team's backlog and different progress statuses, including "in progress" and "complete." The team determines work in progress limits (WIPs) based on available working hours and only places work items (or stories) in the "in progress" column if the WIP allows it. Unlike Scrum, Kanban has no deadlines or timeboxes such as sprints, because work is continuously added to the Kanban board and moved along the columns until complete.
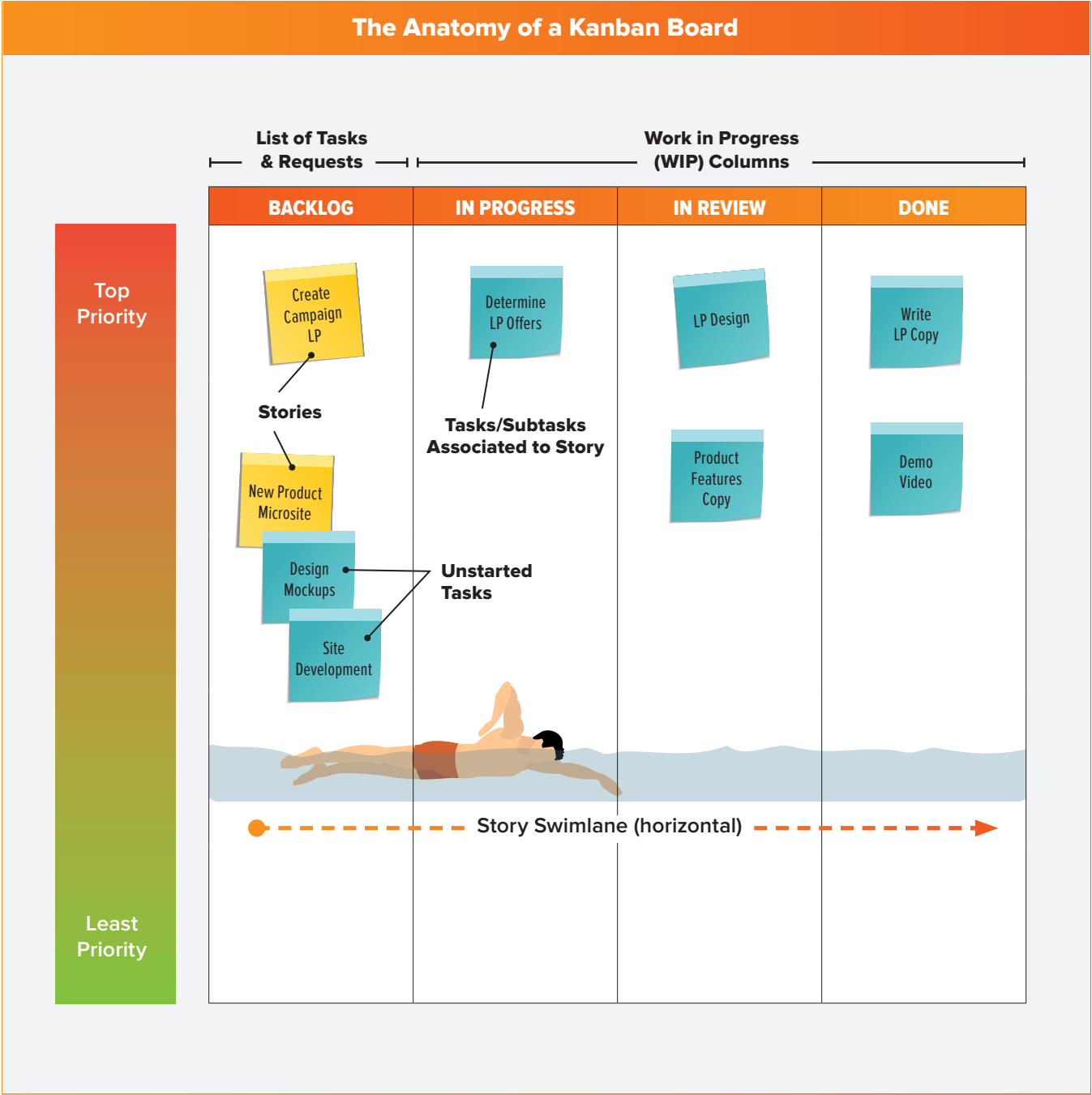
Kanban for marketers looks a little different than it does for developers, but the Agile principles behind it are the same. Here's how to set up a Kanban board and work within the Kanban structure:

1 **Create a Kanban board:** The master Kanban board will have a backlog column as well as a few work in progress columns. As a team, you will determine how many WIP columns to include in your board and what they will be called, such as "in review" or "in progress." Your master Kanban board can be a white board, a digital solution, or a large sheet of paper on the wall—just as long as the entire team can see it.

2 **Determine your WIP limits:** As a team, set your WIP limits to keep your team from working beyond its capacity. These pre-determined limits should come from both a solid understanding of the time your team has available to work on Kanban work (minus the time needed for other daily tasks such as checking emails, attending meetings, or other administrative work) as well as from consistently tracking your team's time on individual tasks.

There are a few ways you can determine your WIP limits:

- **By column:** You can set a WIP limit for each column on your Kanban board. Meaning, only tasks with hour counts that fit into each column limit can be in that column at a time. For example, if your WIP limit for the "In Progress" column is 20 hours, only 20 hours worth of tasks can be in that column at any given time. When, or if, tasks in that column ever exceed the WIP limit, the whole team should come together to discuss why and how that situation occurred, and how it can be improved or prevented in the future.

- **By individual:** Determine the number of hours or items/tasks an individual team member can work on at a time. If you exceed this limit, plan to remove something from the team member's plate in order to accommodate their capacity.

- **By team:** Determine the number of hours or items/tasks your team can work on at a time. If you need to add tasks to the board that exceed these limits, plan to remove other items from your board (back into the backlog) in order to accommodate the team's capacity and the changed priority.

3 **Add tasks or stories to your backlog and prioritize:** As your team receives work requests, add each task or story to your backlog. Like Scrum, Kanban is a pull-driven model where team members pull their next work items from the top of the backlog and move them down their swimlanes and across the progress columns. It is critical that you enter all work into the backlog and prioritize it appropriately with the most important tasks always at the top and the least important at the bottom. Add the tasks from the top to your Kanban board as you complete previous items and can take on new work.

4 **Move tasks across WIP columns:** As each task progresses, move it down its horizontal swimlane on to the next vertical progress column until the task is complete. For example, if you are a project-based team, your backlog will show all the tasks necessary to complete a specific project, such as a webinar. You'll then create your progress columns with titles such as "to do," "in progress," "review," and "done."

5 **Track your team's time:** Time-tracking not only allows you to track how efficiently your team is working, but allows you to more accurately estimate the number of tasks each WIP column can handle before exceeding your WIP limits.
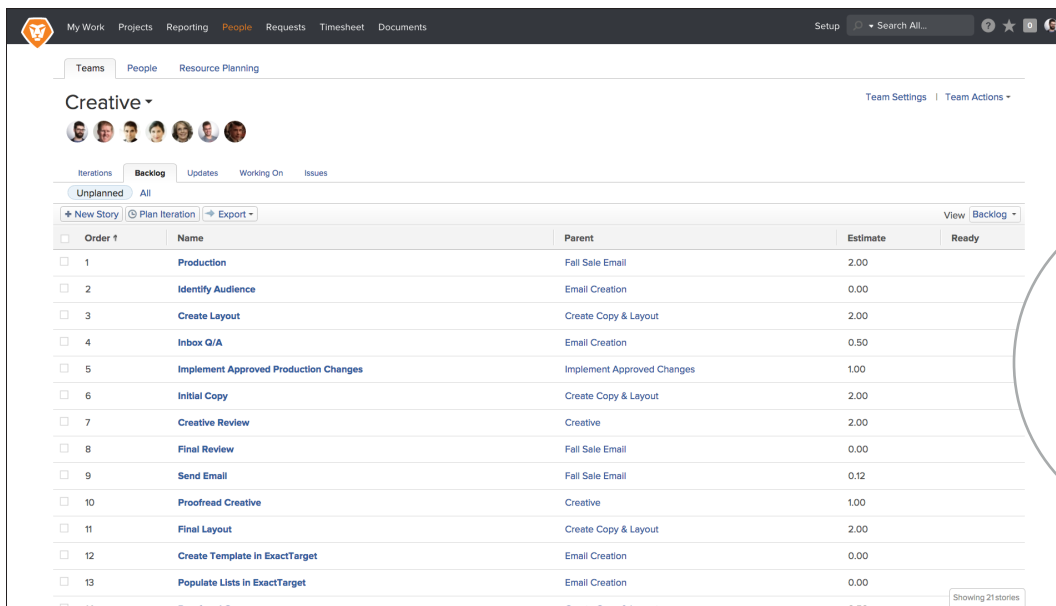
As you can see, Kanban is a fairly simple process of tracking work and offering team-wide visibility into your workflow. The other advantage of Kanban is that when urgent work arises, it is easily integrated into the workflow. Since tasks are broken down into small chunks, work usually progresses in hours or days, allowing teams to quickly add high priority items in their backlog to the Kanban board and identify what current priorities can take a temporary back seat. The continuous release of work in Kanban is one of its most appealing features. When urgent issues arise, marketing teams can be extremely agile—even more so than in Scrum, where new work is usually not added until the end of a sprint.

The Anatomy of a Kanban Board

List of Tasks & Requests

Work in Progress (WIP) Columns

BACKLOG	IN PROGRESS	IN REVIEW	DONE

Top Priority

Least Priority

Create Campaign LP

Stories

New Product Microsite

Design Mockups

Site Development

Determine LP Offers

Tasks/Subtasks Associated to Story

Unstarted Tasks

LP Design

Product Features Copy

Write LP Copy

Demo Video

Story Swimlane (horizontal)

Agile Marketing In Workfront

Workfront is a cloud-based Marketing Work Management solution that allows marketing teams to manage their workflows in the methodologies of their choice—including mixed methodologies. In Workfront, project managers, team leaders, and individuals can manage their work in Waterfall, Scrum, Modified Scrum, and even modified Kanban, without affecting teams that choose to work in different ways. With Workfront, your marketing team can be as Agile as they want to be.
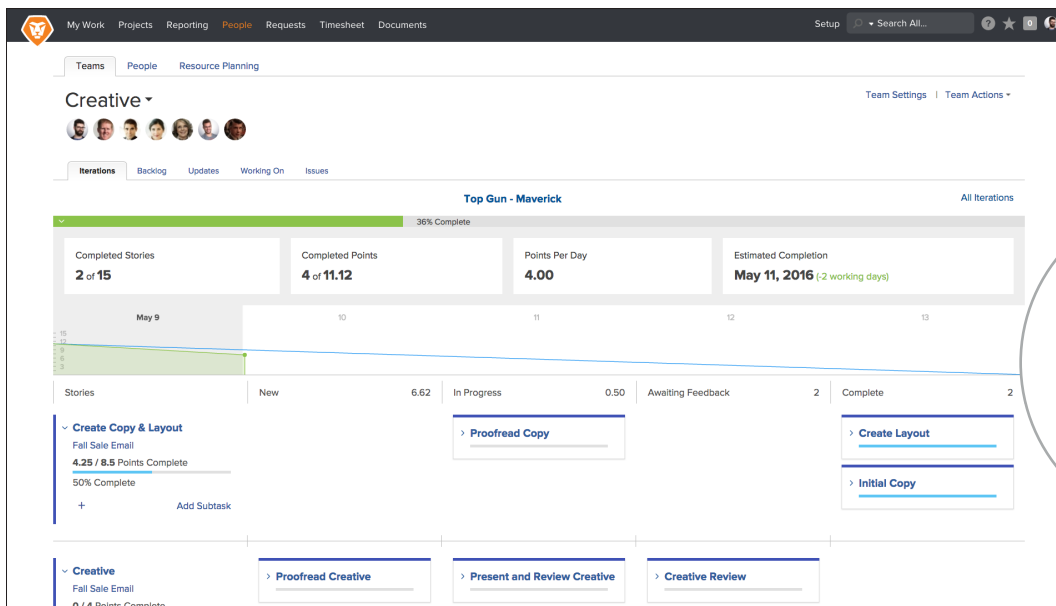
Read on to learn about some of the key Agile capabilities in Workfront.

The request queue feature includes built-in and customizeable briefs to help you collect all the information you need upfront.
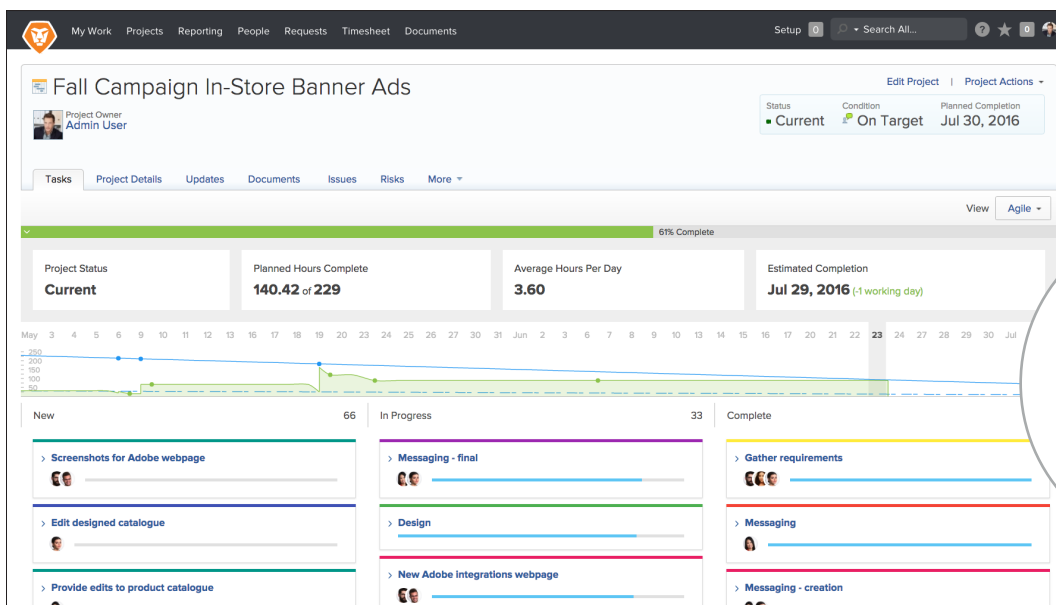
Collect, manage, and prioritize Your backlog: Whether your clients are internal or external, Workfront features a unique request management queue where anyone can submit new work requests to your Agile team. The request queue feature includes built-in and customizable briefs to help you collect all the information you need upfront. Once submitted, requests will automatically route to your product owner or Scrum Master who can then add them to your team's backlog. In Workfront, all your team's work can be managed, filtered, and prioritized in a single backlog view as your team prepares for each new sprint.

Name your sprint something fun, and multi-select items to add from your backlog.
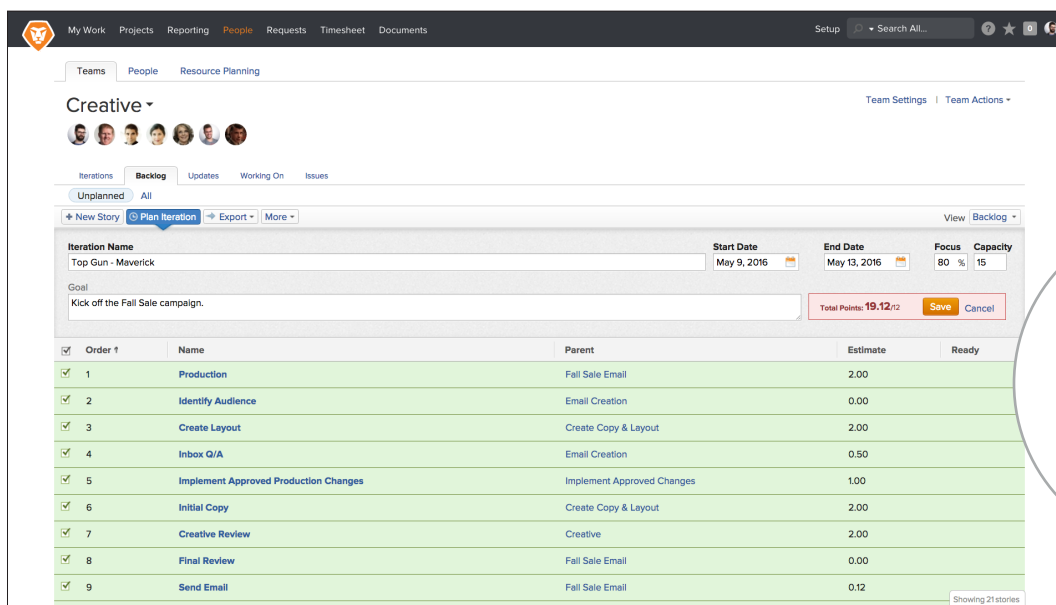
Organize, iterate, and execute in sprints: In Workfront, planning a new sprint is easy. Simply set your desired sprint specifications (One week? Two weeks? Four? No problem!), name your sprint something fun, and multi-selct items to add from your backlog. And don't worry, if you select too many items—or items that are beyond your team's capacity—those items will highlight in red to notify you. Once you hit done, your sprint is ready to roll! And don't worry, you can add or remove tasks or stories from your sprint at any time, so your team can stay as adaptable as necessary.

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The burndown chart updates progress in real time as your team moves stories and subtasks across the progress columns of the visual storyboard.

Track progress with a burndown chart and visual storyboard: Once your sprint has started, you can easily see everything you need to know about your sprint's progress in one easy view. The burndown chart updates progress in real time as your team moves stories and subtasks across the progress columns of the visual storyboard. This way, you and your team have an easy view into the overall progress of the sprint, as well as the progress of each individual item to be done. And of course you can color-code your story cards so you know who is assigned to what.

Make updates by dragging and dropping tasks along the board, and basically never have to deal with a Gantt Chart again.

View Waterfall projects in an Agile way: Workfront has created a new tool for project managers who want a more visual view of their projects—even if those projects are planned in Waterfall. Simply click the "Agile View" button and your project will show up in storyboard format, where you and your team can view the status of tasks, make updates by dragging and dropping tasks along the board, and basically never have to deal with a Gantt Chart again.

Conclusion

While you've likely already experimented with Agile Marketing in some manner, implementing the more advanced tactics in this guide can help you take your Agile Marketing to the next level. Consider what will work best for your team. If Scrum tactics feel too complex or time-consuming to implement, consider Kanban. On the other hand, if Kanban feels too loose and your team is struggling without the structure of regular meetings, sprint time constraints, etc., then stick with Scrum. You may even find a combination of the two works best for your team. For example, your team could use a Kanban board for visualization and prioritizing, but still holding daily stand-up meetings and designate a Scrum Master to help guide things along and manage stakeholders.

Remember, Agile Marketing is intended to help your teams work more efficiently and effectively. If something is not working, don't be afraid to change it. Agile is all about testing, getting feedback, and improving. Keep this idea of continual improvement top of mind as you dive deeper into Agile Marketing and you'll find you can make the adjustments you need to improve both your processes and your outcomes.

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Unleash Your Agile with Workfront

Every marketing leader and team has some Agile inside of them waiting to be set free. The Workfront Marketing Work Management Solution will help your team unleash the Agile within and:

- Adapt to changes without missing a beat

- Become more effective with time and resources

- Focus more on customer satisfaction and continuous delivery

- Revolutionize the way your team does marketing

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