



## GUIDE

# Becoming an Agile Agency:

Tips, tricks, and best practices for implementing the Agile methodology in your agency

## **LET AGILE TAME YOUR WORK CHAOS. LOVE YOUR JOB AGAIN.**

Your agency is made up of talented creatives and innovative executives who never have time to create or innovate. Thanks to massive workloads, constant project requests, unrealistic client demands, and persistent fire drills, you find yourself overworked and underappreciated. Time off? Never heard of it.

But maybe you have heard other agency workers claim that adopting Agile has solved these problems; they claim to only work 40 hours a week; they even claim to have taken a recent vacation (the last time you took a vacation, you probably loved your driver's license picture as much as you loved your job). Are these others just working harder than you are? No. But they are working more efficiently, with the help of Agile. They spend less time fighting against the headwind of project drudgery and more time doing what they got into this business to do.

With your teams, stakeholders, and clients dependent on a traditional approach to work, you may think there is simply no way you could transition to Agile in your agency. But we're here to help you do just that. In this guide, you'll learn:

- How Agile can solve your worst problems at work
- Six easy steps to prepare for a transition to Agile
- Definitions of Agile terminology tailored for agencies
- How an Agile team can still work seamlessly with non-Agile teams
- How to select the right tool to manage your new Agile work

But more importantly, you'll learn to love your job again.

# What is Agile?

Against today's backdrop of pressure to produce compelling content despite razor thin profit margins, Agile stands out as a successful approach to managing agency work. Agile is a methodology for managing projects that focus on improving the speed, productivity, adaptability, and responsiveness of work process, both internally and externally. Agile principles were born from the Agile Manifesto in 2001 and have since been rechristened into a handful of related processes and methods, including Scrum, Kanban, and Extreme Programming (XP). Agile for agencies has its roots in the IT development world and adopts many of these principles, but differs slightly in the details when applied to creative work.

Rather than following the traditional, top-down approach to project management, where every stage of a project is finished before moving on to the next, Agile is a more modern, flexible, team-based approach, perfect for addressing your client's constantly changing feedback and meeting impossibly short project deadlines. Agile methodology favors rapid delivery of small pieces of the project over the traditional completion of the whole project before soliciting feedback.

For example, the traditional approach to a website redesign project is to pitch the project, map it, write all the content for all the pages, finalize the design, and then upload the new design and content to receive client feedback (see figure 1). Often, because the clients changed their minds or didn't actually like the look of the design they initially approved, this whole process must start over again from square one.

With Agile, the process is split into sprints, or one- to four-week intervals, where certain pieces of the project are completed quickly. The first sprint may focus on simply getting a new website menu template and content for the home page done. Then, the two completed pieces are uploaded immediately. While working on the next sprint, the team gathers feedback from the client. If feedback reveals that the web menu on the home page is not intuitive, the team can make immediate adjustments without disrupting or stopping work on other pieces.

"WHEN WE TALK ABOUT AGILE, WE'RE TALKING ABOUT A PHILOSOPHY—A NEW WAY TO TREAT CUSTOMERS, WORK WITH EMPLOYEES, AND GAIN REAL BUSINESS VALUE OUT OF PROJECTS."

— Barbee Davis, author of *Agile Practices for Waterfall Projects*<sup>1</sup>

This ability to change course midstream rather than wait until all the pieces are finalized allows Agile creative teams to greatly increase speed to market, productivity, and even collaboration. It's not about working faster; it's about working better. And that's why it's gaining so much traction in the agency world.

IT'S NOT ABOUT WORKING FASTER  
IT'S ABOUT WORKING BETTER

# Traditional Project Management

A traditional, or Waterfall, approach to agency projects follows a very linear, top-bottom (executive-led) process. A project is taken to completion, then tested for issues.

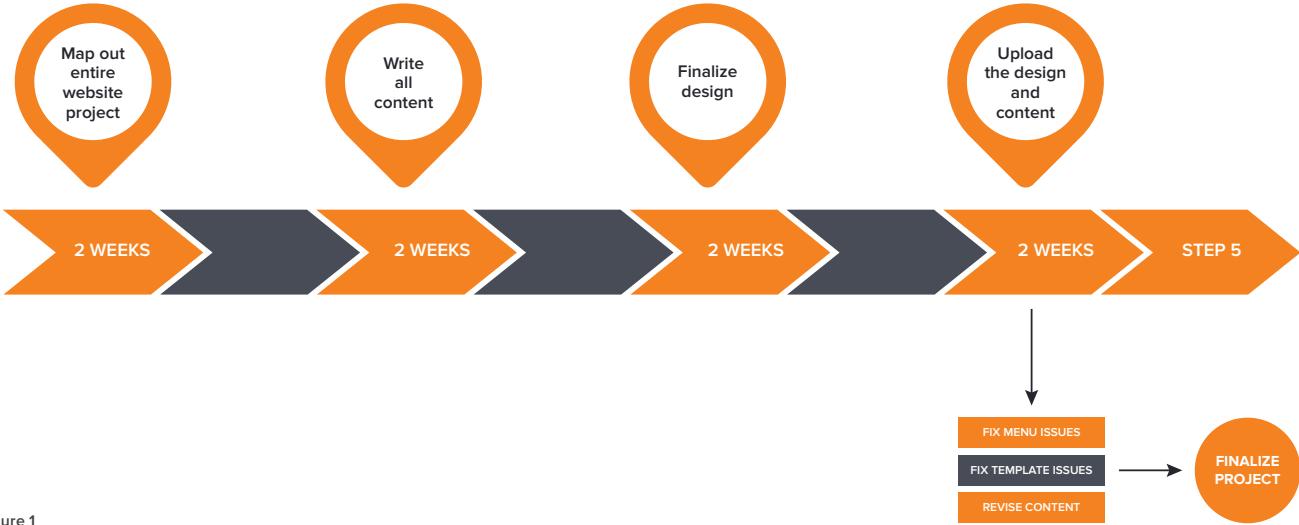


figure 1

# Agile Project Management

An Agile approach to agency projects, like Scrum, follows a circular process of continual team output. In this bottom-up (team-led) approach, a project is broken into small pieces, commonly called sprints, that are completed quickly and in phases, being tested for issues (and feedback) along the way.

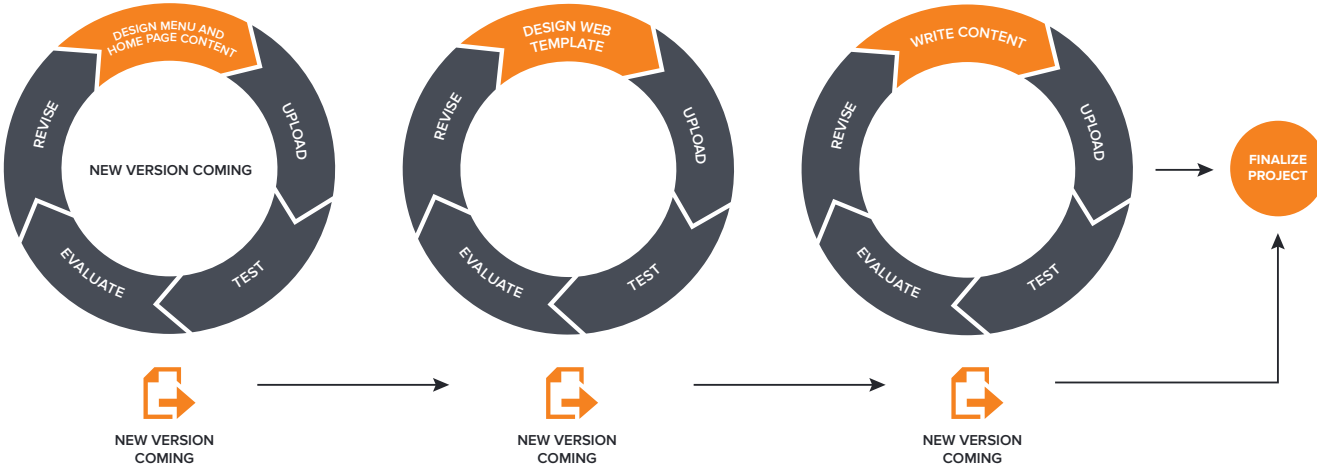


figure 2

# We Know What You're Thinking...

*“But the way we’re doing work now is the way we’ve always done it.”*

Change is hard. Staying with the status quo is easy. But in a world where information moves at the speed of light and data-driven metrics are as important as a catchy ad, staying with the status quo is no longer the best way to manage your work. Though a transition to Agile will not be easy, the greater risk is taking no risk at all.

*“Isn’t Agile for IT teams? We are not IT.”*

You may think Agile is an IT thing and has nothing to do with creative work. Not anymore. Gartner recently predicted that by 2017, the CMO would spend more on IT than the CIO.<sup>2</sup> Thanks to technology, such as marketing automation, CRM, and listening platforms, agency work is more technology-driven than ever before. To stay competitive, agencies need the agility to produce smaller, more frequent pieces of content rapidly, similar to the way developers need to constantly produce new features for software.

*“Agile will keep us from being creative.”*

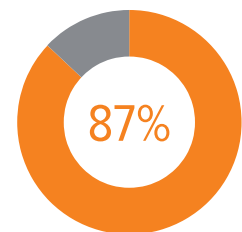
The bottom line is that the more time your team has to be creative, the more they can create. In one study, 87 percent of respondents said adopting Agile made them more productive.<sup>3</sup> Working in Agile creates the right amount of structure and reduces unnecessary structure (think too many long meetings) so teams can be flexible, adaptable, and productive.

*“Transitioning to Agile would be too complicated for my team.”*

While it’s true the transition will take some effort and adjustment, here’s an important fact to consider: marketing departments that consider themselves agile are three times more likely to significantly grow market share.<sup>4</sup> And what better way to increase your agency’s agility, and therefore market share, than with a transition to Agile? Agile allows for more of the flexibility and dexterity needed in your work, so although transitioning may be complicated, it will be well worth the effort. Plus, you’ve got this guide full of tips to help make your transition to Agile as smooth as possible.

“RESISTING CHANGE IS THE MOST RISKY THING AN ORGANIZATION CAN DO. VOLATILITY, COMPETITION, AND OPPORTUNITIES ALL HAVE GREATLY INCREASED, WHILE SHELF LIFE, DELIVERY CYCLES, AND BRAND LOYALTY CONTINUE TO SHRINK AND SHRIVEL.”

– How to Unlock the Promise of Agile in the Enterprise<sup>5</sup>



87% OF RESPONDENTS SAID ADOPTING AGILE MADE THEM MORE PRODUCTIVE.

# Five Ways Agile Can Solve Your Worst Work Problems

## 1 You often fall short of clients' ever-changing expectations.

Agile principles facilitate constant communication with clients, so your ideas and expectations are always in sync.

Sixty-four percent of all respondents to a recent survey said their top project-specific pressure is the management of changing customer expectations.<sup>6</sup> Last-minute changes or additional requests derail your project timeline and put you at a greater risk of disappointing the client. But Agile's iterative approach to project creation keeps your agency in constant communication with the client. You've been soliciting feedback all along, so your project is more likely to be exactly what the client envisioned.

## 2 You live in constant fear of losing a client.

The ability to respond faster to client demands is an important competitive advantage for agencies, and Agile leads the way in helping creatives foresee problems and adapt to change.

Agency tenure is at an all-time low as account turnover continues to increase. Fifty-one percent of clients surveyed said they are reducing their agency roster and plan to reduce further.<sup>7</sup> As new competitors continue to emerge and more clients seek in-house services, agencies face an uphill battle to push boundaries and please clients while maintaining their reputation. Luckily, Agile's model—the continual delivery of parts of a project for client review and testing—makes winning this battle a cinch. Why? Because frequent engagement with your client consistently reminds them of the great work you do—and the reasons they hired you in the first place.

## 3 You struggle to stay profitable.

Agile's focus on rapid and transparent work ensures you'll identify scope creep or timeline overrun before they wreck your project and budget.

Agencies must focus on meeting client expectations instead of fixating on budget, but if projects go over budget by just 10 percent on average, your agency takes a hit of 19.5 percent on your profit margins.<sup>8</sup> In addition to the costs of scope creep and the difficulty of maintaining a healthy margin, the lack of visibility into your team's work means you can't track it in order to improve it; you don't actually know whether the team is working on the agency's most important creative work or not. Agile's fundamental reliance on accountable and self-starting team members—along with its daily stand-up meetings and rapid delivery of project

“BY INCORPORATING FEEDBACK DURING THE DEVELOPMENT PROCESS, A PRODUCT IS MORE LIKELY TO MEET CUSTOMER EXPECTATIONS, AND THE MARKETING IS MORE LIKELY TO HIT ITS MARK. YOU CAN TEST CONCEPTS BEFORE YOU GO OUT AND SPEND BIG DOLLARS ON ADVERTISING.”

— Barre Hardy, Senior Director with marketing consultancy CMG Partners<sup>12</sup>

# 64%

OF ALL RESPONDENTS SAID THE MANAGEMENT OF CHANGING CUSTOMER EXPECTATIONS IS THEIR TOP PROJECT-SPECIFIC PRESSURE.

parts—will quickly reveal who is not pulling their weight and will allow the others to rise to the top.

#### 4 You are unable to retain top talent.

Agile’s highly collaborative, adaptive, and experimental environment breeds accountability and nourishes the work ethic you hope to retain and attract.

It is estimated that US companies lose between \$200 and \$300 billion a year due to employee burnout, decreased productivity, and work-related stress.<sup>9</sup> Everyone at your agency is overloaded with work, so it’s hard to notice who the top performers are, let alone keep track of the work they’re doing to ensure best utilization of their skills. You do your best to recognize and award your team’s good work, but kind gestures do little to alleviate the stress of overwork. And when a talented team member decides to leave, the cost to replace him or her can be crippling—research suggests employee replacement costs can reach as high as 60 percent of an employee’s annual salary.<sup>10</sup> The visibility Agile brings to agency work through daily stand-up meetings and team-led projects allows for a better awareness of everyone’s role, talent, and how they contribute to the overall success of the agency—which helps you reward and retain top team members. Plus, an Agile approach to work comes naturally for and is appealing to the rising generation of creative talent.

#### 5 You and your team have no time to be creative.

Agile increases productivity—the work is broken down into smaller, easier-to-tackle pieces and is, in the end, completed faster.

The top pressure for agency workers is to create more, at a faster speed than ever. Eighty percent of creatives believe they must learn new tools and techniques to stay competitive, but you know your team doesn’t have the extra time or energy to develop their skills.<sup>11</sup> Agile increases visibility and productivity, which means your team completes work faster and doesn’t waste time on rework. Think of it as putting a 5,000-piece puzzle together. The puzzle, or project, as a whole is so burdensome that completing one small chunk of the puzzle at a time will prove more productive in the long run. By the time you’re ready to connect your corners, edges, and middle, you run less risk that there is a piece missing because so many parts are already complete. An Agile project increases productivity and eliminates the rework that keeps your days full, which opens up more time during your workday to develop your talents and stay interested and relevant in the work you do.

THE TOP PRESSURE FOR AGENCY WORKERS IS TO CREATE MORE, AT A FASTER SPEED THAN EVER.

“AN INDECISIVE CUSTOMER CAN TURN A PROFITABLE PROJECT UNPROFITABLE, WHICH IS WHY SUCCESSFUL [COMPANIES] KEEP CLIENTS IN THE LOOP THROUGHOUT PROJECTS AND ENCOURAGE COMMUNICATION.”

– Excellence in Professional Services Aberdeen Group Report<sup>13</sup>

# Business Needs Are Met With Agile

## BUSINESS NEEDS

88%

OF NON AGILE USERS SAY IMPROVING SPEED TO MARKET IS A PRIORITY

91%

OF NON AGILE USERS SAY BEING ABLE TO SWITCH GEARS MORE QUICKLY AND EFFECTIVELY IS A PRIORITY

96%

OF NON AGILE USERS SAY MAKING THEIR TEAM MORE PRODUCTIVE IS A PRIORITY

88%

OF NON AGILE USERS SAY ENHANCED PRIORITIZATION OF THE THINGS THAT MATTER IS A PRIORITY

89%

OF NON AGILE USERS SAY DELIVERING A BETTER, MORE RELEVANT END-PRODUCT IS A PRIORITY



## Results of Agile

93%

SAID ADOPTING AGILE HELPED THEM TO IMPROVE SPEED TO MARKET (IDEAS PRODUCTS OR CAMPAIGNS)

93%

SAID ADOPTING AGILE HELPED THEM SWITCH GEARS MORE QUICKLY AND EFFECTIVELY

87%

SAID ADOPTING AGILE MADE THEIR TEAMS MORE PRODUCTIVE

80%

SAID ADOPTING AGILE LED TO AN ENHANCED PRIORITIZATION OF THE THINGS THAT MATTER

89%

SAID ADOPTING AGILE HELPED THEM DELIVER A BETTER, MORE RELEVANT END-PRODUCT



# Agile Terminology

This glossary explains the most common terms to help in your transition to Agile—because understanding Agile’s jargon-heavy language is half the battle.

## Backlog

A non-prioritized list of everything an Agile team could possibly work on. Ideas, work requests, development needs, and more are held in the backlog, waiting to be moved into a sprint.

## Burndown Chart

Used to measure the progress of an Agile project at both the iteration and project levels. Visually, a burndown chart is simply a line chart representing remaining work over time.

## Daily Standup/Scrum

Short, daily meetings in which team members report on (usually while standing to encourage brevity) what they completed yesterday, what will be completed today, and what hurdles could prevent work from progressing.

## Iteration/Sprint

A fixed duration of time when the team chooses a certain amount of user stories or points to work on and complete. A sprint or iteration is typically a one to four week increment.

## Storyboard/Taskboard

A wall chart with cards and sticky notes that represents all the work in a given sprint. The notes are moved across the board to show progress.

## Story points

An estimation unit that measures the complexity and hours it will take to complete a story.

## Scrum

The most widely accepted of the Agile methods, Scrum’s emphasis is on accepting that the customers can and will change their minds. It answers this unpredictability by encouraging quick delivery of products and fast responses to changing requirements.

## Scrum Master

The person accountable for removing impediments to ensure the team’s ability to achieve the sprint’s goals and deliverables. The Scrum Master is not the team leader, but acts as a buffer between the team and any distracting influences.

## Task

A high-level version of a work request. A task will be added to the backlog and will contain just enough information so the team can produce a reasonable estimate of the effort and time, measured in hours, to accomplish the request.

## Team

The group responsible for delivering the asset or project. A team is typically made up of five to nine people with cross-functional skills who do the actual work (plan, write, design, develop, test, etc.). It is recommended that the team be self-organizing and self-led, but often agency teams already work with some form of project or team management. There’s no need to disrupt your existing team structures because of a transition to Agile—UX, strategy, video production, and creative teams will stay together and work on the same projects as before—Agile simply improves the way they get their work done.

## User Story

A description of a new functionality from the user’s (or client’s) perspective. Having a user story helps you understand who the user is and what he or she is expecting out of this new functionality. A common rule of thumb is to keep user stories short enough to fit on a 3x5 index card.

# Making The Transition To Agile: Six Easy Steps

A transition to Agile is not a simple one. Before you dive in, it is important to take some initial steps to increase the likelihood of a smooth and successful transition.

## 1 Seek support from leadership and your team.

It is crucial that you begin this transition by starting an open dialogue about Agile with your team and stakeholders. Stakeholders often operate under a traditional methodology and are hesitant to embrace Agile, but their hesitations can be eased after a brief conversation. Explain the value Agile would bring to your team and to the agency as a whole, and assure them that Agile metrics can be translated into the metrics and reports they're interested in.

## 2 Get appropriate training.

One of the biggest strategic mistakes made in a transition to Agile is not getting professional training at the beginning. To effect a positive transition to Agile, training and mentoring must take place. Hire Scrum trainers or Agile consultants to carry your team smoothly through the first few projects, and to provide you with the skillset you'll need to eventually accomplish projects alone. A consultant or trainer can also help you decide which Agile process (e.g., Scrum, Kanban, Lean, a hybrid) is best for your team and company.

## 3 Develop cross-departmental coordination.

A transition to Agile won't necessarily be agency-wide; more likely, your team will transition first or will be the only one to do so. To ensure ongoing collaboration with other non-Agile departments or projects, find a way to allow visibility and communication across distributed teams. This may include developing a standard process for submitting work requests, or creating real-time visibility on project status for all stakeholders.

If you manage your work with a software tool, finding one that can manage both Agile and traditional projects—and translate their respective metrics—will make this much easier.

#### 4 **Develop a single way to add stories to and prioritize your backlog.**

Make it a rule—whether you choose to have work requests submitted through a shared spreadsheet, in an email to a specific person, or with work management software—if a request is not submitted correctly, it is not added to the backlog. This guarantees no requests get lost and all work can be prioritized for upcoming sprints.

Once work requests are posted to your backlog, prioritize them based on strategic importance, deadline, who the requester is, or other criteria that makes sense to your team. Prioritization is key to ensuring your team works on what has the most value for your agency.

#### 5 **Assign team roles.**

Agile's foundation is built for small, hands-on teams that are self-managing, transparent, and highly collaborative. Unlike the traditional method of top-down task assignment, Agile creatives will self-commit, based on priority, to the stories or tasks they will work on during a sprint. Your team will need a Scrum Master or a project owner who defines goals for the project and acts as the voice of the client. With a thorough knowledge of your team members' skillsets, you can help direct them to tasks best suited to their expertise.

#### 6 **Set parameters for your sprints.**

Choose a sprint length that will allow your team to complete a reasonable number of stories (typically one to four weeks long). Determine your team's available hours for each sprint (see *figure 3*). And possibly most importantly, decide on a meaningful and encouraging way to reward your team each time they meet or exceed sprint expectations.

"IT'S ABOUT CHANGING THE WAY PEOPLE THINK [ABOUT] AND INTERACT WITH CUSTOMERS...YOU CAN'T COME IN, LAY DOWN A NEW SET OF PROCESSES, AND CHANGE EVERYTHING OVERNIGHT."

— *Barbee Davis, author of Agile Practices for Waterfall Projects*<sup>14</sup>

AGILE'S FOUNDATION IS BUILT FOR SMALL, HANDS-ON TEAMS THAT ARE SELF-MANAGING, TRANSPARENT, AND HIGHLY COLLABORATIVE.

# HOW TO DETERMINE YOUR TEAM'S AVAILABLE HOURS FOR A SPRINT

## Step 1

Have each team member determine their total number of "lights on" hours for the week

NUMBER OF "LIGHTS ON" HOURS PER DAY						
"LIGHTS ON" ACTIVITIES	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
MEETING HOURS	1	2	2	1	1	
MEETING HOURS						
VACATION HOURS						
HOLIDAY HOURS						
EMAIL HOURS	2	2	2	2	2	
OTHER						TOTAL "LIGHTS ON" HOURS FOR WEEK:
TOTAL HOURS:	3	4	4	3	3	17

## Step 2

Find the total available hours, per person, for the week

TOTAL HOURS/WEEK	40
- TOTAL "LIGHTS ON" HOURS/WEEK	- 17
= TOTAL AVAILABLE HOURS	23

## Step 3

Find the percent of availability, per person, for the week

TOTAL AVAILABLE HOURS	23
X 100	x 100
AVAILABLE HOURS TOTAL (A)	= 2300
/ TOTAL HOURS PER WEEK	/ 40
= PERCENT OF AVAILABILITY	= 57.5%

## Step 4

Repeat process for each week in the sprint

## Step 5

Gather numbers from entire team for the week

TEAM MEMBER	AVAILABILITY	DAYS OFF	AVAILABLE HOURS
JOHNNY	57.50%	0	23
FREDDY	60%	0	24
ASHLEY	55%	0	22
SHAINA	65%	0	26
JUAN	60%	0	24
TOTAL AVAILABLE TEAM HOURS FOR THE WEEK:			119

## Step 6

If your Sprint is multiple weeks, do steps 1 – 5 for each week of the Sprint and add totals accordingly

figure 3

# Mixing Agile And Waterfall

While Agile and traditional Waterfall methodologies may be opposite in almost every way, the need for both in an agency is obvious. Your creative and production teams can work efficiently in Agile, but still have the responsibility of reporting to project managers, executives, and clients who work (and think) in Waterfall. Communication is key when mixing the two in the same environment, and managing expectations between the two groups will allow for positive interactions.

The bottom line is that in today's world, we still need the structure of a Waterfall project, but we also need the responsiveness of an Agile approach. To mix the two in your agency successfully, keep these tips in mind:

## 1 Foster a receptive agency culture.

Implementing the Agile methodology in any workplace is difficult if the culture doesn't align with the principles of Agile development. Before you transition to Agile, it's important to first define and articulate the value of an Agile creative team to everyone involved (especially Waterfall-minded executives and clients) in order to create an environment in which that team can flourish. Hold a meeting, blast out an email, whatever you need to do to make sure the values of Agile are explained and, most importantly, understood.

## 2 Decide which metrics to translate.

Your Agile team must be able to report in terms that non-Agile teams, executives, and clients want to see. And those reports must be in a language everyone can understand, so jargon-check any Agile-based communication to avoid causing others to feel threatened by unfamiliar language.<sup>15</sup> Although Agile does not focus on end dates and results in the same way a traditional project approach does, there are still plenty of parts within an Agile project that translate well to traditional metrics. For example, stories translate to tasks, epics to projects, programs to releases, and products to portfolios. For those components that do not translate across the board so cleanly, Agile can always estimate time and equate value to make it more relatable.

## 3 Set appropriate benchmarks.

A good benchmark for a mixed-methodology environment must be a concept that anchors and measures—rather than prematurely sets—expectations. Time spent is a great example of a mixed methodology benchmark; it shows movement forward and fits naturally into Agile's sprint-focused thinking and into Waterfall's phase-gate thinking. Once you have completed a project, reassess your benchmarks. Where in the sprint did you end up compared to where you wanted to end? How much time did it take compared to how much time you had planned? Benchmarking not only measures performance comparatively, but also shows how performance can be improved.

# Looking Ahead: The Next Steps In Your Transition To Agile

Now that you're armed with the start-up knowledge you need in order to tackle a transition to Agile, you should feel confident in your ability to create positive change within your team and across your agency. Don't forget to pattern your own work after the Agile methodology—test early and test often throughout your adoption phase. You may find certain team members are better suited for different roles, or that your team prefers longer or shorter sprints, than you originally expected. Your agency-specific approach to Agile should fit your agency-specific approach to work, so don't hesitate to tweak the process and bend the rules to best suit you.

The benefits of adopting Agile are wide reaching and can bring a new sense of energy and enthusiasm for the work taking place throughout the agency. To maintain this momentum and make your transition to Agile a smooth one, continue to translate key metrics, such as scope, budget, and schedule, to fit within a traditional framework that external stakeholders and non-Agile teams can understand.

Consider using a tool to help. The right tool should allow you to track all your work in both Agile and in traditional project management; the tool's ability to toggle between the two methodologies seamlessly will make implementing Agile even easier—enabling your team and non-Agile teams to work together—and will do the translating work for you automatically. Additionally, look for a tool with built-in collaboration features to keep all work communication where it makes sense—in the context of the work.

# One Last Word On Agile

If you still have doubts about whether it's worth the effort to transition to Agile, consider the marketing department of the Extended Campuses of Northern Arizona University, which switched from a traditional marketing model to Agile marketing in 2011.<sup>16</sup>

## Two years later, the results included:

- 200 pieces of collateral—four times more than what had been produced the previous year, yet the department was less stressed
- Fewer meetings, with only twice-weekly, 15-minute Scrum meetings
- More accountability and shared information without wasting time
- 20% cost savings
- 400% increase in productivity
- 95% sprint task completion rate
- 30% increase in client satisfaction rating

While change is always difficult, it is often necessary. And the overwhelming success of agencies that have implemented Agile methods makes it clear it's a change worth making. For a more collaborative, adaptable, modern, and successful creative team and agency environment, you have to stop living with the chaos of creative work and start managing it.

# Conquer Agency Work Chaos with Workfront

Agencies and creative teams worldwide use Workfront Marketing Work Management to simplify work and eliminate inefficiencies. Workfront addresses the entire lifecycle of marketing work, helping users to:

- Increase productivity and workflow efficiency
- Improve visibility within your team
- Focus more time on creativity
- Build credibility and client satisfaction

[workfront.com/agencies](https://workfront.com/agencies)



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