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The Complete Guide to Agile Marketing

GUIDE



“Thriving in a digital world demands the ability—and the willingness—to adapt.”¹

—Scott Brinker

Co-founder and CTO of ion interactive

Introduction

Charles Darwin and his theories surrounding evolution have been subjects of criticism and praise for over 150 years. But regardless of what anyone thinks of Darwin, the man got at least one thing indisputably right: nature will always favor the agile.

In the past few years, the digital climate of marketing has given new meaning to Darwin’s notion of the “survival of the fittest.” We live in an always-on, instant success, viral-or-bust era where mobile marketing, 15-second ads, and long form blog posts might be on fleek only long enough for most marketers to read that they’re actually a thing before the next thing comes along. Per Darwin’s theory, being agile has never been more imperative to a marketer’s survival. In an effort to be more agile and to ultimately survive, many marketers have adopted Agile Marketing, a work management methodology that emphasizes visibility, collaboration, adaptability, and continuous improvement.

The Agile methodology, despite its relative newness to marketing, has moved beyond the testing phase and has proven that it not only belongs in marketing, but can also transform the capabilities of marketing teams. A recent study of marketers who have adopted Agile Marketing showed that 93 percent said Agile helped them to improve speed to market (ideas, products, or campaigns).²

Anyone who has gone to Google for a simple explanation of Agile Marketing, however, has probably run into a slew of ambiguous, and perhaps contradictory information that left them more confused about Agile than before their search. The purpose of this complete guide is to give you a clear understanding of Agile Marketing and to equip you with the knowledge and tools you’ll need to move forward in transitioning to an Agile Marketing team.

No matter your level of interest in Agile Marketing—just curious, planning a transition, or already all in—this guide will help answer your questions about Agile and provide best practices for how to achieve your Agile goals.

“In a world of rapidly changing customer and market demands accelerated by digital, agile helps teams keep pace.”³

—PWC, “Marketing at the speed of agile.”

What is Agile Marketing?

Confusion about Agile Marketing often stems from attempting to distinguish between lowercase “a” agile and uppercase “A” Agile. Marketing literature on the Internet, and even books, preach the importance of being an agile marketer and keeping up with changes in the marketing world. However, only a few sources address Agile Marketing by its true definition: a work management methodology, most often adopted in the form of the scrum framework, that requires teams to reorganize their work altogether. To explain this further, let’s look at the difference between agile and Agile.

DISTINGUISHING AGILE...

The meaning of the word agile can be found in any common dictionary: *adjective*, “able to move quickly and easily.”⁴ Gymnasts are agile. Lions are agile. Politicians’ platforms are agile.

Lowercase “a” agile is something every marketer or marketing team should aspire to be. An agile marketer is quick and nimble, can easily adjust plans and strategy, and responds to opportunities or challenges quickly. The highly interactive, digital environment of today’s markets in fact demands that a marketer be agile with a lowercase “a.”

“I actually think most marketing teams are more real-time and agile than they believe, without placing a label on it. Marketing tends to be very responsive to the needs of its partners or customers and has no choice but to act in real-time.”⁵

—Mark Verone

VP of Global Operations Automation,
Gogo

... FROM AGILE

Agile with an uppercase “A” is a proper noun, not an adjective. It’s a specific work management methodology consisting of a set of principles and practices that help teams work faster, smarter, and more strategically. Agile methodology is an alternative to Waterfall methodology—the rigid, top-down approach to project management that most marketers follow. Unlike Waterfall, Agile is flexible and adaptive. It relies on short, iterative bursts of work, frequent feedback, and continuous improvement instead of linear, cascading progression.

To be an uppercase “A” Agile marketer is more than merely being agile. It is being or becoming agile by subscribing to the principles and implementing the practices of the Agile Marketing methodology. Adopting the Agile Marketing methodology also means being willing to change the way you and your team think about, manage, organize, and execute on your work. At the end of the day, the result of being an *Agile* marketer is that you become a more *agile* marketer.

“Marketing organizations need to change the way they work to drive increased performance and achieve the effectiveness and efficiency they need to stay relevant in the market. Agile offers that flexible, collaborative, data-driven approach.”⁶

—Barre Hardy

Associate Partner, CMG Partners



The history of Agile

Software developers in the '80s and '90s began defining the Agile methodology while searching for a more efficient approach to project management. In 2001, a small group of developers formalized their consensus in what they called the Agile Manifesto:

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- **Individuals and interactions** over processes and tools
- **Working software** over comprehensive documentation
- **Customer collaboration** over contract negotiation
- **Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.⁷

The Agile Manifesto also outlines 12 principles of Agile. The manifesto now has thousands of signatures, and it's hard to find a development team that doesn't adhere to at least some Agile principles (95 percent practice Agile).⁸

Following the formal definition of Agile for software developers, a number of existing project management frameworks were deemed Agile and many more were subsequently born. Methods like Scrum, Kanban, Scrumban, DSDM, XP, and others are all considered adequate applications of the Agile methodology because they incorporate the values and principles of the Agile Manifesto.



The rise of Agile Marketing

What began in the software development world, has now found a place in marketing. Marketers have an increasing and urgent need to be more agile—to adapt faster and more positively to change and to deliver work more iteratively. So, CMOs, marketing team leaders, and marketing project managers have started to look to the Agile principles and practices that have worked so well for development teams, and have begun to adapt those practices to marketing work.

Jim Ewel, an early Agile Marketing enthusiast, recognized that some principles of Agile development apply to marketing, but many do not. So, he wrote a marketing version of the Agile Manifesto:

Agile Marketing is an approach to marketing that takes its inspiration from Agile Development and that values:

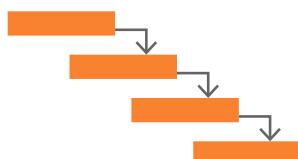
- **Responding to change** over following a plan
- **Rapid iterations** over Big-Bang campaigns
- **Testing and data** over opinions and conventions
- **Numerous small experiments** over a few large bets
- **Individuals and interactions** over target markets
- **Collaboration** over silos and hierarchy

The goals of Agile Marketing are to improve the speed, predictability, transparency, and adaptability to change of the marketing function.⁹

Although there are many Agile practices or framework options for development teams, the most widely used frameworks are Scrum and Kanban, or Scrumban—a hybrid of the two. Thus, it's no surprise that the most often adopted Agile practices in marketing are the same. For that purpose, this guide will only focus on the Scrum and Kanban frameworks as they pertain to marketers—a hybrid framework that we have deemed the “Modified Scrum” practice.¹⁰

What is Modified Scrum?

WATERFALL



In order to better understand Scrum, you first need to understand the term, "Waterfall"—the most common (and consequently the most antiquated) project management approach used in marketing. Waterfall methodology is characterized by breaking up projects into sequential segments, called milestones, where one segment cannot begin until the previous segment is finished. In Waterfall, tasks are assigned to individuals and teams before the project begins and project progress cascades down a Gantt Chart as the team reaches each milestone. This top-down, classic approach works well in areas like construction, manufacturing, and repeatable services, but the rigidity of this model can often limit marketers.

According to Scott Brinker, author of the book, "Hacking Marketing," and an Agile Marketing pioneer, there are two major dangers of Waterfall in marketing work:

- 1. Gathering requirements.** "Waterfall expects us to know precisely what we want, up front, in the early stages of our planning and design. Software developers quickly ran into the folly of that assumption. They would ask clients what their requirements were, in detail. But once clients saw the resulting software, they would frequently change their mind." Sound familiar? Brinker further explains that, unfortunately, in the Waterfall model, it's very difficult, time-consuming, and demoralizing to climb back up the waterfall to change previously-completed stages of the project."¹¹

2. Timescales. "Waterfall projects, from start to finish, usually have a time horizon that is measured in months or years. A big marketing campaign, from beginning to end, is typically at least a six-month venture...In such long schedules, the early planning stage becomes separated from the final delivery stage by a wide expanse of time. Over that stretch of time, things change—whether you want them to or not...Unfortunately, the waterfall model does not adapt well to such changes. We have to suffer with an outcome that is out of sync with the market, go back to earlier stages—often throwing out work already done—or desperately try to fix things through frantic fire drills at the last minute."¹² Put plainly, in Waterfall, it takes marketers much too long to get campaigns to market.

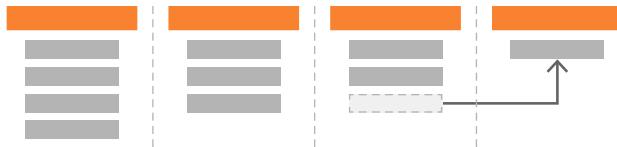
SCRUM



Scrum is an Agile framework that began with development teams and is one of the most popular Agile work management practices. Scrum is based on the idea that quick, concentrated sprints make teams more flexible, iterative, and agile than top-down approaches like Waterfall. In Scrum, a small team (ranging from three to seven people) plans short bursts, or sprints, of work. Sprints typically range from one to three weeks in length and are comprised of a certain amount of stories, or tasks and subtasks, chosen by the Agile team, from their backlog of tasks and requests. The team then works together to complete all the work in the sprint before the sprint ends with the goal in mind of producing a minimum viable product (MVP) to be released and tested. Daily Scrum meetings facilitated by a Scrum Master provide a venue for the team to discuss progress,

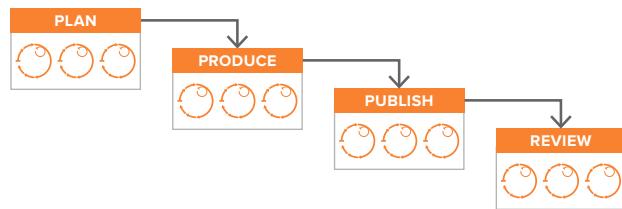
dependencies, and potential roadblocks. At the end of a sprint, the team holds a Sprint Retrospective meeting where they reflect on what did and did not go well in the previous sprint. They then plan their next sprint, based on internal and external feedback, and the entire Scrum framework repeats with a heavy focus on continuous improvement and releasing the next improved iteration of the MVP.

KANBAN



Kanban is 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. The thought process behind Kanban is summed up by the adage, “While there’s a hole to fill, fill it; otherwise, stop shoveling.” 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 (often called swimlanes) that indicate a team’s backlog and different progress statuses including “in progress” and “completed.” 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. Kanban has no deadlines or timeboxes, like sprints, because work is continuously added to the Kanban board and moved along the columns until complete.

MODIFIED SCRUM



Modified Scrum is an “Agile Lite” type of approach that most marketers find more suitable and customizable to their unique workflows and needs. It allows marketers to include elements from Waterfall—most specifically concrete deadlines and project milestones—to the Scrum framework, and then use a storyboard and swimlanes from Kanban if they want. Scrum meetings, backlogs, and prioritization are perhaps just as useful to a marketing team as they are to a development team. But sprints or iterations in their purest forms do not always translate directly to a marketing team. (e.g., Some marketing teams might find that an all-in Scrum approach works for them, but many marketers prefer a modified Scrum.) Instead, marketers often opt to plan projects in Waterfall and then execute on the tasks from those projects in a more visual and Agile way.

Understanding Agile terminology

AGILE AND SCRUM TERMS AND DEFINITIONS

 **Scrum** – An Agile framework for managing work in which a small team works as a unit to reach a common goal as opposed to a traditional, sequential approach to project management. Invented by software developers, this practice in a modified form is the most widely used by Agile marketers.

 **Backlog** – An ever-evolving list of work requests, tasks, or subtasks assigned to an Agile team. Backlog items are called “stories” and are prioritized according to due dates, hours, and/or points.

 **Sprint** – A one, two, or three week (generally) stretch of time in which an Agile team will work together to complete a predetermined list of stories from the backlog.

 **Story** – A high-level definition of a work request, project task, or subtask. Each story is assigned a point value based on the estimated number of hours required to complete it. Requests, tasks, or projects are converted to stories before they move from the backlog to a sprint.

 **Epic** – An overarching initiative that includes multiple stories and that might span many sprints. In Agile Marketing a multi-stage campaign would be considered an epic.

 **Story Points** – An estimation unit assigned to a story (tasks or groups of subtasks). Points are typically equivalent to hours (1:1 ratio), but some advanced Agile teams create point systems that measure the complexity and hours required to complete a story.

 **Storyboard** – A visual representation of work derived from Kanban. Storyboards are typically created either manually, using whiteboards and sticky notes, or digitally in work management solutions. Storyboards consist of at least three columns (called swimlanes) representing the progress of work in a sprint and several cards or sticky notes that represent the individual stories in the sprint. The cards are moved across the board to show progress as the sprint progresses.

 **Swimlanes** – Columns that break up a storyboard into story statuses. Typical swimlane titles include, from right to left, “New,” “In Progress,” “Awaiting Approval,” and “Complete.” Story cards progress across swimlanes during a sprint.

 **Kanban** – A visual work management approach that uses storyboards, swimlanes, and work in progress (WIPs) limits to ensure resource capacity, demand, and supply are all balanced. Adapted from its origins in manufacturing, Kanban can help developers and marketers be more Agile.

KEY SCRUM ROLES



Scrum Master – The Scrum Master filters requests that come to the Agile team, manages the backlog, and facilitates all Scrum meetings. This role is not necessarily a leadership role. In fact, it can be a rotating role held by anyone on the Agile team. The Scrum Master handles the “how” of a project.



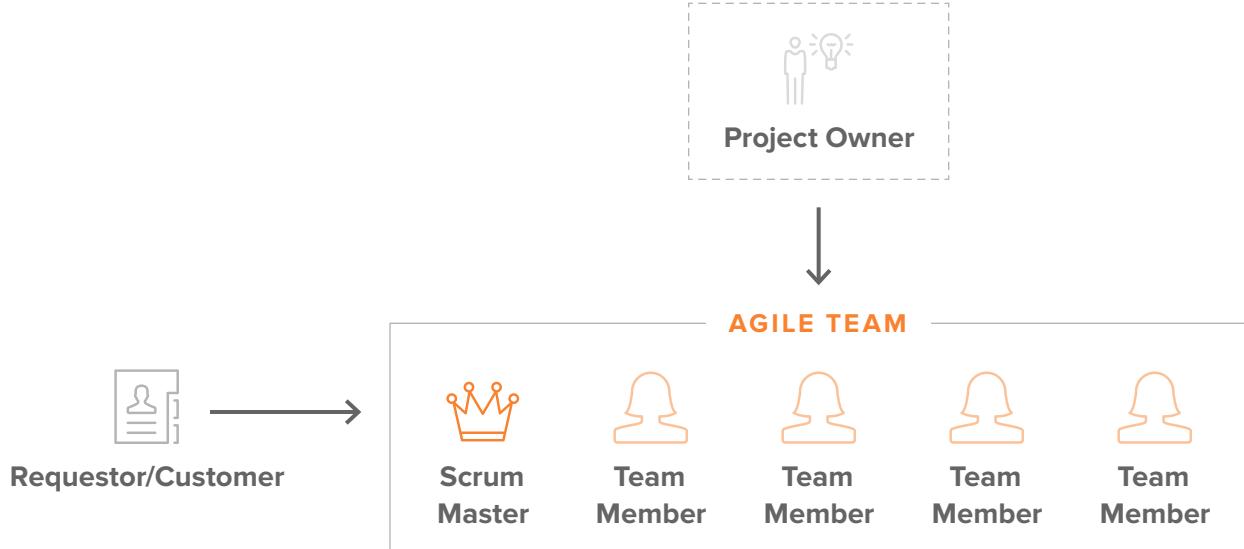
Project Owner – Often called product owner in Agile development and project owner in Agile Marketing, this person is the assigned leader of the team. This position is typically filled by a leader already in the company such as a CMO, director, or manager. The project owner oversees the “what” of a project. Often in Agile Marketing, this position is found unnecessary.



Requestor/Customer – Also referred to as clients, a requestor is anyone requesting work from an Agile team. A requestor could be internal or external, an individual or a group. These people are stakeholders in the project requested of the Agile team.



Team Member – A team member is any individual contributor to the Agile team; this includes the Scrum Master. One person can be a team member on multiple Agile teams..



SCRUM MEETINGS

SPRINT PLANNING MEETING

Is held a few days before a sprint and can last a few hours.

In the meeting:

- Score/prioritize backlog items
- Determine individual and team availability
- Determine which items the sprint will include
- Distribute decided tasks among team (typically on a volunteer basis)
- Set goals/address obstacles for sprint

DAILY STANDUP OR DAILY SCRUM

A quick (<10 min.) meeting held at the beginning of each day in a sprint.

In the meeting:

- What they did yesterday
- What they'll do today
- Any obstacles* they face

* One role of a Scrum Master is to shield the team from obstacles. They will help to remove obstacles for relevant team members or tasks.



SPRINT RETROSPECTIVE

A brief (<1 hour) meeting held soon after, or in conjunction with, the Sprint Review to review the "how" of the sprint.

In the meeting:

- Compare projected vs. actual results
- Discuss setbacks and wins
- Set goals to improve future sprints
- Discuss what worked and what didn't work and make relevant adjustments

SPRINT REVIEW

An informal meeting held at the end of a sprint to review the "what" (i.e., what work was addressed) of the sprint.

In the meeting:

- Invite product owner and stakeholders
- Display deliverables/progress achieved during sprint
- PowerPoint presentations are not allowed

5 reasons to seriously consider Agile Marketing

In a side-by-side comparison of Agile Marketing and traditional project management, Agile Marketing is the clear winner. Research by CMG Partners showed that Agile methods produce better results on a number of important business needs—from faster time to market to delivering more customer-centric outcomes.¹³

Here are five reasons to embrace Agile:



93% said adopting Agile helped them improve speed to market.¹⁴

1. Improve speed to market

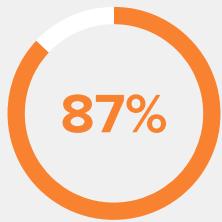
Time is money. A slow speed to market gives the competition the upper hand and leaves your brand stale. The Scrum method sets you up with the procedural infrastructure to move projects or campaigns from the ideation stage to delivery at a competitive rate.



93% said Agile helped them switch gears quickly and more effectively.¹⁵

2. Adapt and respond faster

The rules in the business world are akin to the rules of nature; if you can adapt, you can survive. The ability to adapt and respond faster to change is an important competitive advantage for marketing teams. Agile leads the way in helping marketing teams adapt so they can respond faster.



87% said Agile made their teams more productive.¹⁶

3. Increase productivity

With Agile, productivity increases for several reasons. One reason is the entire team has visibility into the team's objectives, priorities, and projects. Information flows freely because there are no silos. Another reason is bottlenecks, imbalanced workloads, or other hindrances to productivity all but disappear in an Agile team because the right amount of communication and collaboration is constantly occurring. Agile also focuses on constant improvement. So, for the most part, if a team spots an inefficiency in their process during one sprint, they'll tweak their methods before their next sprint so they never run into the same problem again.



80% of respondents said Agile led to enhanced prioritization of the things that matter.¹⁷

4. Stay prioritized

Staying focused on the highest priority work allows companies to remain proactive rather than reactive and leads to positive market and customer outcomes. The Agile methodology, and Scrum, more specifically, encourages daily backlog prioritization. This helps ensure you're working on the most valuable work, making it easier to prove your team's value to the rest of the organization.



80% said Agile helped them deliver a better, more-relevant end product.¹⁸

5. Create customer-centric deliverables

Your success as a marketer depends on your ability to reach and influence your customers. If your message, campaign, product, etc., doesn't jive with your audience, then you'll lose customers, and eventually, your job. Agile Marketing emphasizes the need to organize your work processes so they revolve around the voice of your customer, whether your customer is an internal or external client or a target audience.

A black and white photograph showing a woman with short hair sitting in a chair, looking towards the right. In the foreground, the back of another person's head and shoulders are visible, suggesting they are engaged in a conversation.

Preparing for Agile Marketing



Preparing for Agile Marketing

Remember, there are different degrees on the Agile Marketing spectrum. You may find that it just doesn't make sense for your team to adopt every one of the methods that follow. You and your team can decide together how "Agile" you need to be and which Agile practices you'd like to adopt.

Becoming Agile and adopting a Modified Scrum approach will require significant change and a shift in the way you and your team think about, view, and organize your work. To help you prepare and manage this change, here's a list of things to do before you make the Agile transition:

Secure leadership buy-in

Without buy-in from those at the top, it will be difficult to get the support you and your team must have to make Agile work. Consider giving them a copy of this guide to help them get excited about it.



Get your team on board

If your team doesn't see the value of Agile Marketing, it will be tough to get the train out of the station. Discuss together the value of an Agile approach to your work. Include your team members in the decision-making process. For resistant team members, work with them to understand their concerns and help them find a role in the process that is appropriate for their skills and personality.

88% of marketers say senior leadership buy-in is imperative to an Agile rollout.¹⁹

Form teams and assign roles

An ideal Agile team size is small—around three to seven people. Assign one person to be Scrum Master for each team and remember this can be a rotating role. Also assign a project owner for each Agile team, though it may work to have multiple Agile teams report to a single project owner. This is a person who they are likely already reporting to.

If you have more than seven people on your team, you can create multiple smaller Agile teams. Here's a chart of the most common Agile Marketing team formations:

AGILE TEAM TYPE	MARKETING APPLICATION		
Job Role/Title	<p>This could be a creative services team with 4 graphic designers, 3 copywriters, and 3 video production specialists. Under this option, you would create three small Agile teams: one for all graphic design tasks and requests, one for all copy tasks and requests, and one for all video projects and requests.</p> <pre> graph TD A[AGILE TEAMS WITHIN CREATIVE SERVICES] --- B[GRAPHIC DESIGNERS] A --- C[COPYWRITERS] A --- D[VIDEO PRODUCTION SPECIALISTS] B --- B1[] B --- B2[] B --- B3[] C --- C1[] C --- C2[] C --- C3[] D --- D1[] D --- D2[] D --- D3[] </pre>		
Expertise/Skills	<p>This might be a large marketing ops team with smaller Agile teams based around the different solutions they support: one team for marketing automation and another for CRM and the project management solution.</p> <pre> graph TD A[AGILE TEAMS WITHIN MARKETING OPS] --- B[MARKETING AUTOMATION] A --- C[CRM] B --- B1[] B --- B2[] B --- B3[] C --- C1[] C --- C2[] C --- C3[] </pre>		
Vertical/Audience	<p>This could apply to a cross-functional product marketing team that focuses on a specific target market. A product marketing team with multiple target markets, could create smaller Agile teams each containing a content marketer, a sales enablement specialist, and a market analyst. Each team works on only the projects and requests relevant to their target market and each individual works on their part of the process specifically. (Note: this arrangement is the least Agile of the three options, but can still be more effective than traditional teams.)</p> <pre> graph TD A[AGILE TEAMS WITHIN CREATIVE SERVICES] --- B[TARGET MARKET 1] A --- C[TARGET MARKET 2] A --- D[TARGET MARKET 3] B --- B1[Market Analyst] B --- B2[Sales Enablement Specialist] B --- B3[Content Marketer] C --- C1[Market Analyst] C --- C2[Sales Enablement Specialist] C --- C3[Content Marketer] D --- D1[Market Analyst] D --- D2[Sales Enablement Specialist] D --- D3[Content Marketer] </pre>		

If you're a marketing project manager looking to manage your next big campaign or project using the Agile Marketing methodology, the previously mentioned team options can also apply to your project. You will need to choose which team structure (or create a hybrid of your own) is most conducive to your project's success.

Map out your desired workflow

Before you jump into Agile practices, it's important to map out the lifecycle of your work and make any needed changes in order to smoothly incorporate Scrum into your workflow. From request/ideation to delivery, determine what path your projects will take and how that path will include Scrum practices. You may want to hire an Agile Marketing consultant to help you through this process.

Consider getting official Agile training

Agile consists of dozens of possible structures and processes. And while this guide is a good starting point to understanding Agile, it might be a good idea to get professional Agile training—especially if you're using an online system to manage your Agile work. You will want to learn how the interface works with your workflow. “Sending people to (at least) scrum training, bringing in advisement consultants for the first few projects and then having a plan for moving it all out systematically—that’s where people really find the business value in Agile,” Barbee Davis said, author of *Agile Practices for Waterfall Projects*.²⁰

Develop cross-departmental coordination

To ensure ongoing collaboration with other non-Agile departments and/or projects, find a way to allow visibility and communication across distributed teams. This may include developing a standard process for submitting work requests and creating real-time visibility into project status for all stakeholders. If you manage your work with a software solution, finding one that can manage both Agile and traditional projects in harmony will make this easier.

Create a standardized request process

It's important to develop a single way to receive all the work requests relevant to your Agile team. Whether they are submitted through an online form that auto-populates a shared spreadsheet, emails to your Scrum Master or Product Owner, or through a request queue in your work management system, make it a rule: if requests are not submitted correctly, they don't get added to the backlog. This ensures no requests slip through the cracks and all work can be prioritized appropriately for upcoming sprints.

If you've followed all the steps so far, then you're in a good spot to move toward your first sprint. Keep reading to learn how to successfully prepare for it.

Before the sprint



Planning your first sprint

Your first sprint as a newly formed Agile team should be an occasion to remember. It will likely be a clunky experience with plenty of learning opportunities. But if everyone on the team approaches the first sprint (and even the first many sprints) with the expectation that it will be a learning process full of trial and error, then you'll have an enjoyable and successful experience. Remember, the idea is to focus on *continuous improvement!*

Before your first sprint begins (perhaps a few days before), the Scrum Master should lead a sprint planning meeting with the Agile team. Expect this first sprint planning meeting to last a few hours. Subsequent sprint planning meetings will take less time, but in general, the sprint planning meeting should be the lengthiest meeting in Agile Marketing.

The goals of a sprint planning meeting are to review, score, and prioritize the team's backlog items, determine individual team member availability and constraints, distribute tasks, and make any other preparations that will make the next one to four weeks run smoothly.

Because it's your first sprint planning meeting, you'll have a few extra housekeeping items on the agenda. The following list gives ideas on how to be successful in your first sprint planning meeting:

Turn your first sprint planning meeting into an Agile launch party

Since this meeting will likely take a few hours, the more life you can put into it the better. You know what will mean the most to your own team, but here are some ideas to give you some inspiration:

- Give your Agile launch party a theme based on your team name.
- Order food for the meeting (maybe even related to your team name, if it makes sense).
- Assign a team member as the official Agile launch party DJ.
- Have the Scrum Master give an "official" speech.
- Give out some Agile swag.
- Balloons, confetti, etc. the whole nine yards.



A sprint planning meeting agenda might look like this:

Address the backlog

- Estimate hours for and prioritize tasks
- Determine which tasks/projects will go into the sprint

Plan the sprint

- Determine each team member's available hours
- Determine total team-wide available hours
- Discuss any special time constraints
- Determine the length of the sprint

Distribute stories*

- Assign out or indicate which team member(s) will work on which stories

Discuss any additional relevant goals or obstacles for the sprint

- Set specific goals to work smarter, more efficiently, using less budget, etc.
- E.g. "Our goal is to be 70% allocated to sprint work"

* According to strict Scrum practices, tasks should be divvied on a volunteer basis—never assigned—during the daily Scrum. However, many marketing teams find that their workflow or team structure still requires a team lead to assign tasks to team members during the sprint planning meeting. Do whatever fits your team best, even if it's a combination of the two ways. (This is another reason we call it Modified Scrum.)

Name your team

Get creative with this, and make it a team effort. How do you want the rest of the marketing department or even the entire company to refer to your team? One of the Star Wars factions? An ancient Greek state? A Kevin Costner movie title? Remember, this is internal only, so you can get away with being lighthearted.

If you're having a hard time coming up with an Agile team name, here are some name ideas to get your juices flowing:

- **Team Bacon** – nothing is better (or more American, if you're in the U.S.) than bacon, right?
- **Team Flash** – with so many possible meanings (a delightful Queen song, flash drives, done in a flash, the flash of a camera, etc.), you'll keep people guessing.
- **The Avengers** – what better way to prove that you can band together to conquer work than by going with the ultimate team of superheroes?
- **Killer Clowns from Oterspace** – perfect if your team is into awesomely horrible 80s movie that never should have been a thing.
- **The Kevin Bacons** – it always comes back to bacon, doesn't it?

Create and prioritize your backlog

This isn't a complicated step, but it can be tedious. It will likely look slightly different for every type of Agile Marketing team depending on your team formation (see page 16 about Agile Marketing teams). However, the principles of this step apply to all fledgling Agile teams.

1. First, determine with the team how backlog items should be named. For example, you might require that each task name include

the item's due date, the name of the task, the name of the parent project (if there are multiple tasks in a project), and the requestor's name. Whatever your naming convention, make it short enough to fit on a sticky note.

2. Then, have each team member break down his or her entire workload into a list of projects and tasks. This list should include current and future work. It shouldn't include meetings, any email time, or administrative work (e.g., sprint planning), but it should include any task or project that the team, or any individual on the team, is responsible for completing.
3. Ensure that each list item is a small chunk of work. Campaigns and projects should be broken into smaller pieces, typically no longer than a few hours per task. (Remember, Agile focuses on sprints of work, not big-bang campaigns.)
4. Each team member should then name each item in their list according to the decided naming convention.
5. Once each individual's list is prepared, combine the lists and eliminate any redundancies. The combined list is now your Agile team's backlog.
6. If your team is using a physical storyboard, transcribe each list item onto a sticky note. Otherwise, create the digital equivalent using your Agile solution. Each of these cards now represents a story.
7. Finally, prioritize the backlog according to your team's objectives. Place the most pressing stories near the top of the backlog. Leave the less urgent stories near the bottom of the backlog. This will help you remember which stories must be added to the next sprint and which stories can wait.

Estimate hours (points) for all tasks and projects in the backlog

In an orthodox Scrum approach, an Agile team will assign points to stories based on arbitrary definitions of project sizing—T-shirt sizes (XS, S, M, L, XL), to name one. An even more complex approach might assign points based on a scorecard of multiple, weighted criteria: e.g., project deadline, project duration, requestor, complexity, etc.

Agile Marketers following a Modified Scrum method, however, will often avoid the complexity of point calculators and will simply refer to points and hours interchangeably. In other words, one story point equals one hour required to finish the story. So, a story that would take three hours to complete would be worth three points.

Decide on the length of your sprint

Your first sprint should be your guinea pig. We recommend starting with two weeks and adjusting for future sprints as needed. Be prepared to change this, however, because your team may find that two weeks is just too fast because tasks may span multiple days. Or you might find that two weeks is too long considering the average length of your tasks.

Name your first sprint

This is another step where you should get creative and make it a team effort. Make sure the sprint name includes the dates it will cover, but after that, anything goes. Sprint names can be as random as you want to make them, or you can be a little more “strategic” in your naming (e.g., U.S. Presidents, famous artists, or world mountain ranges).

Determine available sprint hours

Before you can begin assigning stories from your backlog to your sprint, you need to determine how many hours your team has available to commit to the sprint. This is where you account for what we call “lights-on” activities; these are activities that you just have to do every week, every day, regardless of the other work you might be doing. Think about the hours you spend reading and responding to emails every week, or attending meetings, or doing administrative work—like planning a backlog; these are all lights-on hours.



Here's a calculator to help you 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					Total hours
	Meeting hours	Vacation hours	Holiday hours	Email hours	Other	
Monday	1			2		3
Tuesday	2			2		4
Wednesday	2			2		4
Thursday	1			2		3
Friday	1			2		3
TOTAL "LIGHTS ON" HOURS FOR WEEK:						17

STEP 2

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

Total hours/week - Total "lights on" hours/week	40 - 17
= TOTAL AVAILABLE HOURS	= 23

STEP 3

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

Total available hours x 100	23 x 100
Available hours total (A) / Total hours per week	= 2300 / 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	57.5%	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

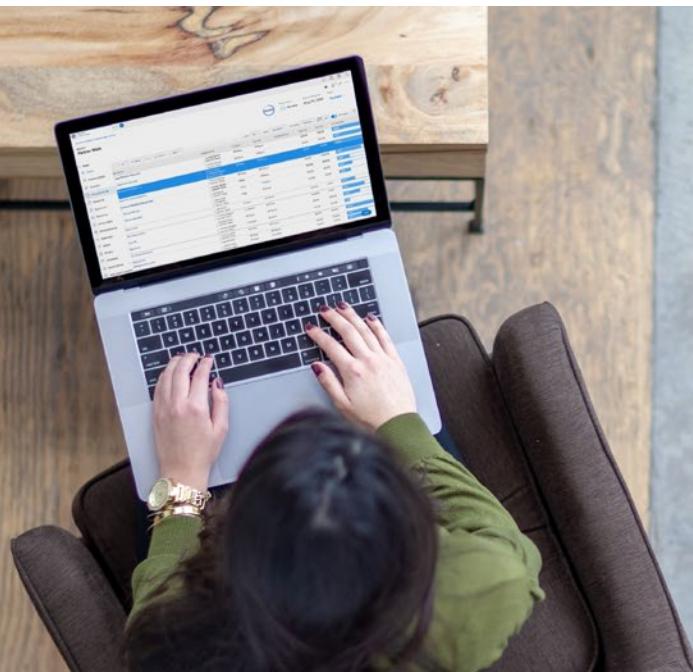
If your sprint is multiple weeks, do steps 1–5 for each week of the sprint and add totals accordingly.

Assign stories from your backlog to your sprint for the first time

Now that you know your team's availability for the coming sprint, you can move stories from your backlog into your first sprint. If you're using sticky notes and a whiteboard, simply move the sticky notes from your backlog column to your "working on" swimlane. If you already prioritized your backlog, this step should be fairly easy. Simply add stories from the top of your backlog until the number of story hours in the planned sprint equals the team's total number of available sprint hours. This is a step that will be repeated in each sprint planning meeting.

Determine your carrot

This is another opportunity to spice up your transition to Agile. Decide as a team what a successful first sprint will look like. For some, success might simply be carrying out a sprint planning meeting, maintaining a storyboard, and holding daily standup meetings. For others, success will mean completing all the stories in the sprint before the sprint is over. Regardless, give yourself something to aim for, and then decide on what your reward will be if you meet your goal. Make the reward sweet enough that it's actually motivational—a steak dinner as a team, a sizeable gift card, everyone gets to go home early, etc.



During the sprint



During the sprint

With sprint planning behind you, the bulkiest management part of Scrum methodology is over. But you'll be glad you spent the time necessary to be thorough in your sprint planning meeting, because during the actual sprint you'll only need a 10-minute daily meeting to sync about work.

Hold daily standup meetings

Also known as Daily Scrums (named after the rugby play), daily standup meetings should be short. Very short. In fact, they're called standup meetings because if you're standing, then you'll remember to keep them short. Each morning the Scrum Master should call the Agile team together for this meeting. Here's what a typical daily standup should cover:

1. Assign stories/tasks

Agile teams that follow a true Scrum method will take a portion of the daily standup to divvy up stories from the sprint on a volunteer basis. This means each team member would move the story card/sticky notes they've chosen into the "working on" swimlane to indicate that they plan to work on that story that day. On Agile teams that decide to assign work before the sprint, this step has already been finished. But even these teams can take time in the standup meeting to make any adjustments or reassignments to the sprint's stories.

2. Discuss the progress of the sprint

During a standup meeting the team should review each team member's progress and its connection to the progress of the sprint as a whole. This is a moment of accountability for all team members. Using the storyboard as a visual, each member should report on what they did yesterday, what they will work on today, and what, if any, risks there are to completing their tasks on time.

3. Reorder the backlog as necessary

All marketing teams are used to receiving last-minute and urgent requests. Hopefully once you've established and communicated your new sprint process, many of those will be mitigated. However, there will always be things that come up and, in true Agile fashion, you'll need to be ready and able to pivot and accommodate. Generally, all new work requests are added to the backlog and prioritized according to previously defined rules. Ideally, no new work should be added mid-sprint, but if necessary, you can always be sure to buffer your available hours so you are ready to accommodate last-minute requests. Tasks from the sprint may also be pulled to accommodate any urgent work that is added and then re-prioritized on the backlog.

After the sprint



After the sprint

Two of the main principles of Agile Marketing are (a) recognizing and celebrating team achievements, and (b) reflecting regularly on how to be more effective and adjusting accordingly. These principles are especially addressed in two meetings following the end of the sprint: the sprint review and the sprint retrospective.

1. Hold a sprint review meeting

The sprint review is an opportunity to show off and discuss the work your team accomplished during the sprint. It should last no longer than an hour or two and should be facilitated by the Scrum Master. The project owner and any key stakeholders should also be invited to this meeting; however, it should be an informal meeting (some teams even ban the use of PowerPoint for this meeting).

The purpose of the sprint review is to share the deliverables you created during your sprint or the progress you made on the deliverables, whether or not they're finished. It should be a venue for providing feedback on the "what" of the sprint. Often, new stories will be added to the team's backlog based on discussions in the sprint review.

"By presenting our reviews we earned more credibility within the organization. There's a lot of black box around marketing. The results-reporting piece was a huge credibility builder."²¹

—Kirsten Knipp

VP of brand and product marketing,
Bigcommerce

SPRINT REVIEW

An informal meeting held at the end of a sprint to review the "what" (i.e., what work was addressed) of the sprint.

In the meeting:

- Invite product owner and stakeholders
- Display deliverables/progress achieved during sprint
- PowerPoint presentations are not allowed

2. Hold a sprint retrospective meeting

The sprint retrospective should be held soon after the sprint review, and shouldn't last much more than hour. Again, the Scrum Master facilitates the meeting, but this time, only the Agile team is invited—no stakeholders or management. The sprint retrospective is a time to go over the “how” of the sprint. It’s an opportunity for the team to compare projected vs. actual results of the sprint and to discuss setbacks and wins. The team should look back at the sprint from an efficiency perspective—a “how” perspective—and make goals to improve future sprints.

“Sprint reviews and retrospectives formally introduce a cadence in which marketing organizations pause, look, and understand data and its implications, identifying what they have learned, along with how they can and should improve, and how they can work better together.”

—**Barre Hardy**

Associate Partner, CMG Partners

SPRINT RETROSPECTIVE

A brief (<1 hour) meeting held soon after, or in conjunction with, the Sprint Review to review the “how” of the sprint.

In the meeting:

- Compare projected vs. actual results
- Discuss setbacks and wins
- Set goals to improve future sprints
- Discuss what worked and what didn’t work and make relevant adjustments

3. Celebrate. And get ready to do it all over again

When your sprint retrospective ends, it’s time to celebrate. Go get that steak dinner, or go out for happy hour, or whatever you decided your “carrot” would be. But also, start getting mentally ready for your next sprint, because the whole cycle should begin again, starting with another sprint planning meeting, right after you finish a sprint.



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