

The top two-thirds of the page feature a teal background with a large, semi-transparent gear graphic. The gear is positioned on the left side, with its teeth pointing towards the top and right. The gear is composed of several concentric circles and radial lines, creating a sense of motion and industry.

GUIDE

BECOMING AN AGILE MARKETING TEAM:

The beginner's guide to managing creative projects using Agile methodology

AtTask

TAME YOUR MARKETING CHAOS. ADOPT AGILE.

Creative teams and agencies battle significant challenges. They have massive workloads, constant requests for last-minute projects, unrealistic client demands, persistent fire drills, tedious approval processes, and a marketplace that is always on, always connected, and always changing—and they grapple with all this while trying to create world-class, compelling work. Because of these challenges, they live in a work environment that requires an unprecedented need for speed and flexibility.

Yet, most teams still work the same way they did a decade or two ago: research, plan, create, distribute, and measure. This may have worked fine back in the dark ages (like the 1990s), but in today's world this approach doesn't provide the flexibility or speed necessary to adapt to midstream feedback. It also does nothing to stem the tide of overwhelming work requests and chaos that creates missed deadlines, burned out employees, and frustrated clients.

But what if there were a better way to work? A way that could increase your team's productivity by 400 percent?¹ Think what you could accomplish with that kind of productivity...no more missed deadlines, no more working late hours or weekends, and no more frustrated clients.

Sound too good to be true? How can you achieve all of this? It's simple: Agile marketing.

In this guide, learn everything you need to know about adopting an Agile approach to:

- Organize and manage your workload and team
- Increase your output
- Ensure your team's priorities
- Keep your clients happy

WHAT IS AGILE FOR MARKETING PROJECTS?

Agile is a methodology for managing projects that focuses on improving the speed, productivity, adaptability, and responsiveness of the marketing process, both internally and externally. Agile has its roots in the IT development world and adapts many of those processes, but differs slightly in the details when applied to creative work.

Rather than following the traditional or linear, top-down approach to project management, where every stage of a project is finished before moving on to the next one, Agile is a more modern, flexible, team-based approach. Agile emphasizes rapid delivery of smaller chunks of a project over completing the entire project at once.

For example, the traditional approach to a website redesign project follows this model (see *figure 1*): map the entire project, write all the content for all pages, finalize the design, and then upload the new design and content. In Agile, the process is split into sprints, or two-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 customer. If feedback reveals that the web menu on the home page is not intuitive, the team can make immediate adjustments.

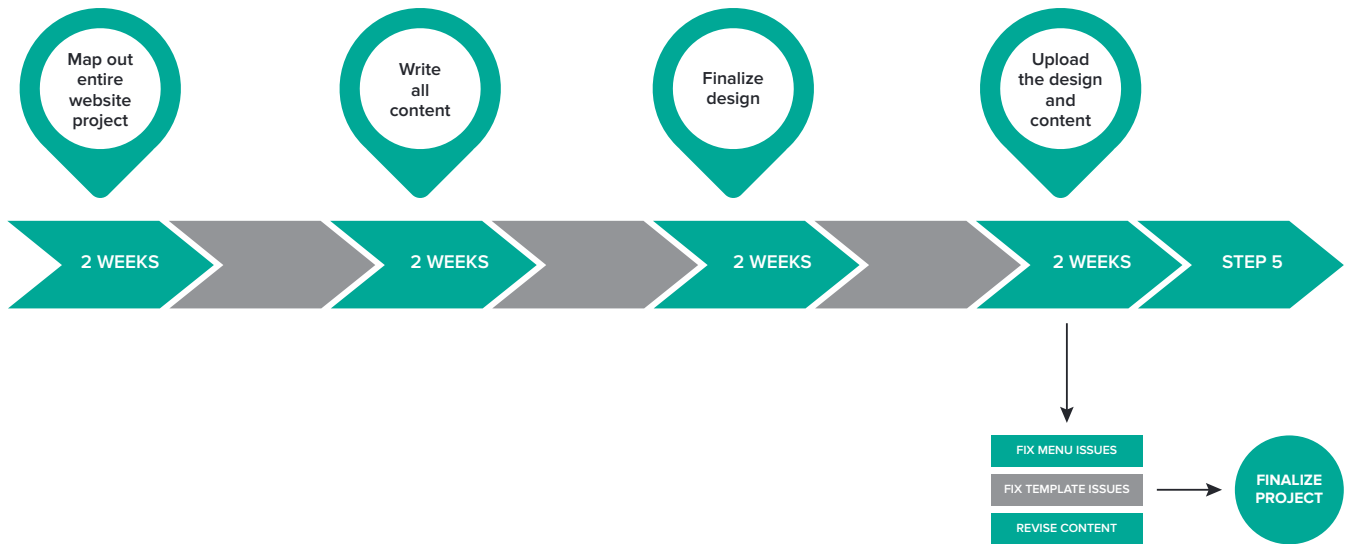
IT'S NOT ABOUT WORKING FASTER
IT'S ABOUT WORKING
BETTER

This ability—to change course midstream rather than wait until all the pieces are finalized—allows Agile creative projects to greatly increase in 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 marketing world.

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TRADITIONAL PROJECT MANAGEMENT

The traditional approach to a website redesign project follows a very linear, step by step process.



AGILE MARKETING

With Agile methodology, a website redesign project is broken down into smaller pieces, called sprints, where certain pieces of the project are completed quickly and in phases.

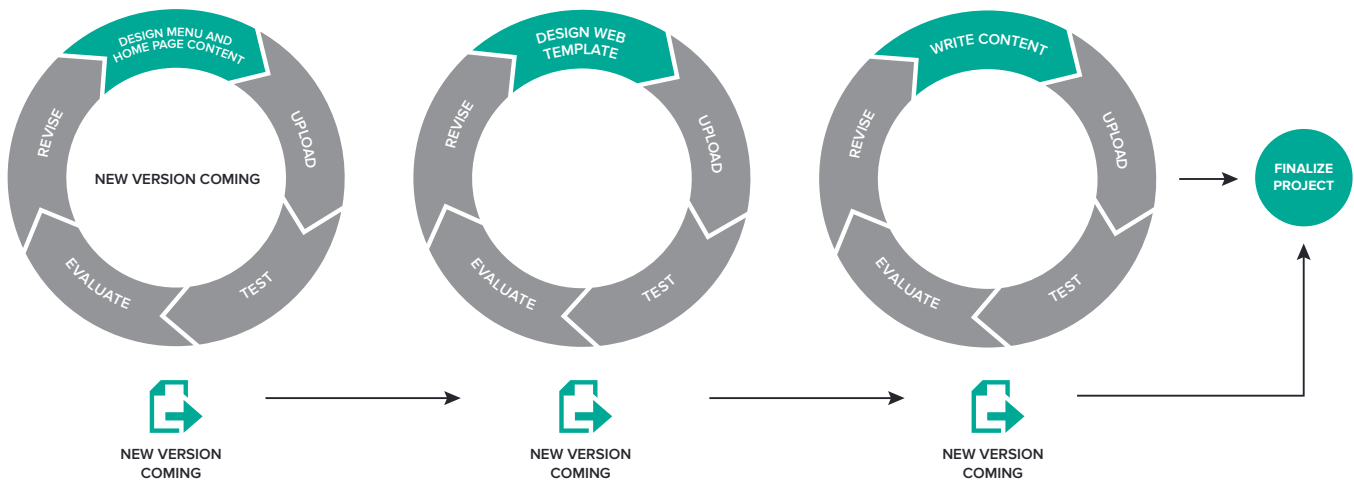


FIGURE 1

WE KNOW WHAT YOU'RE THINKING...

As with any big change, it's important to address the typical initial objections that marketing creative teams have to implementing an Agile approach to their marketing work. So, let's address the most common ones, right up front:

“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. At least that's how it can seem when faced with a big transition. 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 safe bet or even the easiest way to manage your work. The reality is that the challenges your team faces are not going to go away unless you actually do something to change the situation. Doing requires action. Most action requires change. It's time to make improvements happen.

“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.² Thanks to technology, such as marketing automation, CRM, listening platforms, etc., marketing is more data driven than ever before. To stay competitive, marketing in-house creative teams and agencies need to be nimble and able to produce smaller, frequent pieces of content rapidly, similar to the way developers need to constantly produce new features for software.

“Agile will keep my team from being creative.”

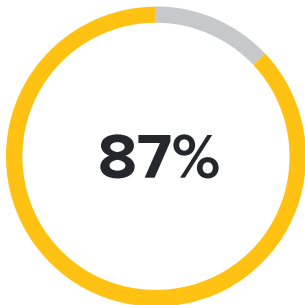
Or you may be afraid that Agile is too structured and will kill your team's creativity. After all, you're “creative types,” not programming geeks. But you would be wrong. In one study, 87 percent of respondents said adopting Agile made them more productive.³ And the truth is, the more time your team has to be creative, the more they can create. Agile is really all about creating the right amount of structure and reducing unnecessary structure (think too many long meetings) so that teams can be flexible and adaptable.

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

And, of course, there's always the argument that it's too complicated to try to transition to a new way of managing work. While it's true the transition will take some effort, here's an important fact to consider: marketing departments that consider themselves agile are three times more likely to significantly grow market share.

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Transitioning to Agile may be a bumpy journey, but the numbers don't lie. It will be well worth it.

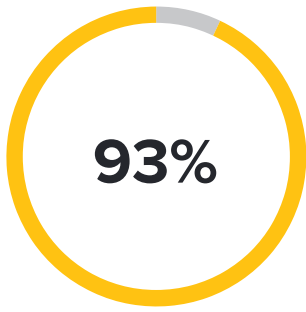


87 percent of respondents said adopting Agile made them more productive.

MARKETING DEPARTMENTS
THAT CONSIDER THEMSELVES AGILE ARE

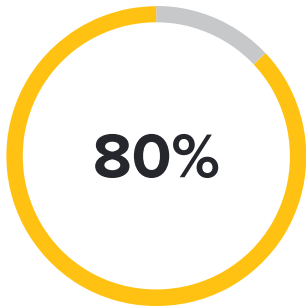
3X MORE
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93 percent of respondents said adopting Agile helped them improve speed to market.⁶

93% OF MARKETERS
SAY AGILE HELPED THEM SWITCH
GEARS QUICKLY
AND MORE EFFECTIVELY.⁸



80% of respondents said Agile led to enhanced prioritization of the things that matter.⁹

80% OF RESPONDENTS
SAID ADOPTING AGILE HELPED
THEM DELIVER A BETTER, MORE
RELEVANT END PRODUCT.¹⁰

FIVE REASONS YOUR MARKETING TEAM NEEDS AGILE

In a side-by-side comparison with Agile and traditional management users, Agile is the clear winner. As the results from Forbes show, Agile methods produce better results on a number of important business needs—from faster time to market to delivering more customer-centric outcomes.⁵

Here are five reasons to embrace Agile:

1. Improve speed to market

Time is money. A slow speed to market gives the competition the upper hand and leaves your brand stale.

2. Adapt and respond faster

It isn't just technology that's changing rapidly. Consumers are adopting changes faster as well. In 2007, the original iPhone took 73 days to cross the million mark. The iPad managed the same feat in just 28 days.⁷ The ability to adapt and respond faster to change is an important competitive advantage for creative teams and agencies. Agile leads the way in helping marketers adapt so they can respond faster.

3. Increase productivity

With Agile, productivity increases because the work is broken down into smaller, easier to tackle pieces. It's like putting a 5,000-piece puzzle together—the puzzle (or project) as a whole is so big and difficult to manage that taking on one small corner or chunk of the puzzle at a time will prove more productive in the long run.

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. It will also help ensure you're working on the most valuable work, making it easier to prove your team's value to the rest of the organization.

5. Create more customer-centric deliverables

Today's customers share their experience with others in an unprecedented number of ways— through social media, reviews, and word of mouth, to name a few. Whether your clients are internal or external, delivering additional customer-centric products and ideas that create brand loyalty, evangelize, or promote your client's brand is what determines whether your clients keep coming back or look elsewhere for new, creative ideas.

Working the way you've always worked is not only *not* working but is dangerous to the long-term success of your company. The world is a different place today and the only way to remain part of the conversation is to create a highly collaborative, adaptive, and experimental environment that can respond to the demands and expectations of today's consumers.

BUSINESS NEEDS ARE MET WITH AGILITY

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

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

FIGURE 2: IMAGE ADAPTED FROM FORBES ¹¹

UNDERSTANDING AGILE TERMINOLOGY

There is a lot of terminology associated with Agile. Before getting started, it's important to make sure everyone is speaking the same language. Browse this glossary to get familiar with Agile terms.

Backlog

An ever-evolving list of work requests that conveys to an Agile team what projects to work on first. Requests are expressed in terms of user stories that are assigned estimates (e.g., in points or hours) and prioritized accordingly.

Burndown chart

Burndown charts are 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.

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 two- to four-week increment.

Story/Task

A user story is a high-level definition of a work request, containing just enough information so the team can produce a reasonable estimate of the effort to accomplish the request.

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

A flexible, holistic strategy where a team works as a unit to reach a common goal as opposed to a traditional, sequential approach.

Scrum master

The scrum master is accountable for removing impediments to ensure the team's ability to achieve the sprint goal/deliverables. The scrum master is not the team leader, but acts as a buffer between the team and any distracting influences.

Team

The team is responsible for delivering the asset or product. A team is typically made up of five to nine people with cross-functional skills who do the actual work (research, write, design, test, execute, etc.). It is recommended that the team be self-organizing and self-led, but often teams work with some form of project or team management. Larger creative departments may have multiple teams.

MAKING THE TRANSITION TO AGILE: SIX EASY STEPS

1 GET READY TO GO AGILE

We won't lie. Agile is a big transition. Before you dive in, it's important to take some initial steps that increase the likelihood of a smooth and successful transition.

1. MAKE SURE TO GET 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.

2. GET YOUR TEAM ON BOARD.

If your team's not with you, it'll be tough to get the train out of the station. For resistant team members, work with them to understand their concerns and help them find a role that is appropriate for their skills and personality.

3. GET APPROPRIATE TRAINING.

Agile can be complex, with dozens of different aspects and processes. One of the biggest strategic mistakes is not getting professional training at the start. "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," says Barbee Davis, author of *Agile Practices for Waterfall Projects*.¹²

4. 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 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 will make this easier.

"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

Agile Practices for Waterfall Projects

2 CREATE A BACKLOG

Your backlog is essentially your "to do" list. To make the backlog effective:

1. DEVELOP A SINGLE WAY TO ADD STORIES TO YOUR BACKLOG.

It's important to develop a single way to receive all work requests. Whether they are submitted through a shared spreadsheet, in an email to a specific

2. BRIEFLY DESCRIBE EACH TASK OR STORY.

Descriptions should be short enough to stick on a post-it note and added to the backlog as they are received. Larger projects should be divided into a cluster of tasks. Tasks may come in different sizes and complexity.

3. PRIORITIZE YOUR BACKLOG.

Once work requests are posted to your backlog, it's important to prioritize them. This may be based on strategic importance, deadline, who the requester is, or other criteria that makes sense to your team. This is a key step in making sure your team works on what has the most value for your organization.

3 ASSIGN ROLES

Agile revolves around small, hands-on teams that are self-managing, transparent, and highly collaborative. Within the team, there are certain roles. The roles your team needs include:

1. SCRUM MASTER.

The scrum master facilitates the process. Not a leader in the traditional sense, the scrum master ensures that the process stays on track and helps remove impediments.

2. PROJECT OWNER.

The project owner defines the goals for the project and acts as the voice of the customer.

3. CREATIVE TEAM.

These are the workhorses of the team. They are tasked with getting the work done. The creative team is composed of different specialties such as writers, designers, digital marketers, and others.

4. STAKEHOLDERS.

The stakeholder role is informational only. They are kept up-to-date on the project, but are typically not involved in the process.

4 SET GOALS FOR THE SPRINT

There are several key considerations in determining what will be accomplished in each sprint. You will need to:

1. DETERMINE THE LENGTH OF THE SPRINT.

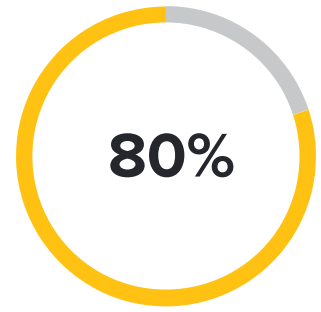
Sprints are typically two- to four-weeks long. Select a length that you feel is doable for your team and allows you to complete a reasonable number of stories.

2. ESTIMATE STORY POINTS FOR EACH STORY.

Based on previous experience or your best educated guess, assign a number of points to each story. These points will be in relation to the complexity and hours involved in each story or task.

3. DETERMINE "LIGHTS ON" WORK HOURS.

To determine how many hours or points your team can complete per sprint, have each team member calculate how much time they spend a day on



80 percent of respondents said adopting Agile led to an enhanced prioritization of the things that matter.¹³

84%

PERCENT OF RESPONDENTS EXPERIENCED IMPROVED TEAM MORALE WHEN ADOPTING

AGILE METHODOLOGY¹⁴

“lights on” work like attending meetings, managing emails, etc. Then, find an average percentage for your team—perhaps 20%. 20% of an eight-hour workday, or 1.6 hours, is time the team can spend not working on stories in the sprint. The rest of the time, or 6.4 hours per day, should be spent on Sprint stories. Take the remaining hours each day for each team member, add the hours up, and multiply the number of hours by the number of work days in your sprint (i.e. a 2 week sprint would be 10 days). This is the number of total hours your team has to dedicate to a sprint. To ensure your goals for the points or hours your team wants to complete per sprint are realistic and achievable, be careful not to over-allocate your team (see figure 3).

4. REWARD YOUR TEAM.

You might want to offer a perk for your team if they reach the sprint goal. Perhaps you bring in donuts the next day or everyone gets to leave early if they finish ahead of schedule. Or maybe a prize goes to the team member who completed the most story points in the sprint. This will help increase morale and introduce a little healthy competition to your team.

5 HOLD DAILY STAND UP MEETINGS

Daily stand up meetings are meant to be short (under 10 minutes) and focused. The meetings should be directed by the scrum master and are used to keep everything on track and everyone informed. Called “stand up” meetings because attendees typically stand (helps keep the meetings short), there are several key tasks that each meeting should accomplish:

1. ASSIGN STORIES/TASKS.

Unlike the traditional method of top-down task assignment, in Agile the team members typically self-commit, based on priority, to the stories or tasks that they will work on during a sprint. When they move one story to “Complete,” they select another to begin working on.

2. DISCUSS THE PROGRESS OF THE SPRINT.

Stand up meeting are a good time to review the team’s progress. This is a moment of accountability for all team members. In conjunction with evaluating progress on the burndown chart, 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 BACKLOG AS NECESSARY.

All new work requests get added to the backlog and prioritized according to previously defined rules. Ideally, no new work gets added mid-sprint, but if necessary, it is prioritized against other tasks. Tasks from the sprint may also be pulled to accommodate any urgent work that is added and then re-prioritized on the backlog.

“We would focus on a project at a time, and that did not allow us to be adaptable or flexible to handle new initiatives. When an urgent project came along, the team would either stop what it was doing to do the new project or try to work on both simultaneously with the same resources. These shifts were stressful and sapped productivity. But the short, iterative work cycles that define Agile marketing mean multiple deliverables are completed in two weeks or less, and the team is constantly making room for new ones.”¹⁵

JUDITH FREY

Vice President for Interactive Marketing
Xerox

“One intrinsic benefit to adopting Agile marketing in your online marketing department is that everyone is painfully, obviously, in the game. If, during one of the 10-minute stand up meetings, Joe Bob can’t report incremental progress, then that’s on him. And no one is left to wonder why the guy down the chain of interlocking or sequential tasks can’t get his part done.”¹⁶

HEATHER RAST
PRINCIPAL AT INSIGHTS & INGENUITY

6 CONTINUALLY MEASURE AND EVALUATE

Agile is all about being more transparent and nimble. To enforce this, you must consistently and constantly:

1. UPDATE THE STORYBOARD.

If using a storyboard rather than a software tool, move your sticky notes as necessary to show progress (i.e., from working on to complete). This keeps the process transparent and everyone can see at a glance where things stand.

2. UPDATE THE BURNDOWN CHART.

The scrum master is responsible for ensuring that as stories are completed, the burndown chart gets updated. Again, this keeps the process highly transparent and makes it easy for all team members, including stakeholders, to quickly see the progress of the sprint.

3. HOLD SPRINT REVIEWS.

At the end of a sprint it is important to review both the process and the deliverables produced. This is usually kept to an hour or so and may involve getting feedback from stakeholders as well. From the information gleaned, adapt as necessary to improve the next sprint.

4. RECOGNIZE THE TEAM.

A sprint review is also a good time to give the team recognition for their accomplishments.

5. BEGIN PLANNING THE NEXT SPRINT.

And the cycle begins again...

“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.”¹⁷

BARRE HARDY

Senior Director with
Marketing Consultancy
CMG Partners

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: DETERMINING "LIGHTS ON" WORK AND TOTAL AVAILABLE HOURS PER SPRINT

IMPLEMENTING AGILE, AGILE-Y

Now that you know all there is about Agile, it's time to take the plunge. But don't dive in all at once. It *is* a big change. Start with one team and take it slowly. And just like the Agile methodology, test early and test often. See what its working well and what is not. You may find certain team members are better suited for different roles than expected or you may find that longer or shorter sprints make more sense for your team and work processes. Adjust as necessary.

To make the transition smoother, continue to translate key metrics, such as the scope, budget, and schedule within a traditional framework that external stakeholders and non-Agile teams can understand. Consider using a tool to help. The right tool can save time and work better than a whiteboard and sticky notes. And a tool that allows you to track all your work in both Agile and/or traditional project management and toggle between the two seamlessly will make implementing Agile even easier—allowing your team and non-Agile teams to see all the work in the way that makes the most sense without your needing to translate. Additionally, look for a tool with built-in collaboration features to keep all work communication in one place—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 marketing, consider the marketing department of the Extended Campuses of Northern Arizona University, which switched from a traditional marketing model to Agile marketing in 2011.¹⁸

Two years later, the results included:


- 200 collateral pieces—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 percent cost savings
- 400 percent increase in productivity
- 95 percent sprint tasks completion rate
- 30 percent increase in client satisfaction rating

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


MODERN MARKETERS MANAGE WORK THE AGILE WAY, WITH ATTASK

With AtTask, you don't have to be traditional. Adapt to change and keep your customers happy with a modern, Agile approach to work. AtTask Agile makes it easy to break down stories, prioritize work, estimate time frames, and stay up-to-date with burn-down charts that offer a quick view of how work is progressing toward expected completion dates. With AtTask, your Agile team can work faster—and smarter.

To request a free trial of AtTask Marketing Work Cloud and see how your team could use AtTask to become more Agile, please contact us at the following:

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