



GUIDE TO BUILDING
**AN AGILE
IN-HOUSE
TEAM**



“Marketing and creative teams that adopt an agile process will find that it improves efficiency, and ultimately **allows the team to produce higher quality work.**”

— Robin Colangelo, Global Director
of Creative Services, White & Case

Agile for Marketing & Creative Teams

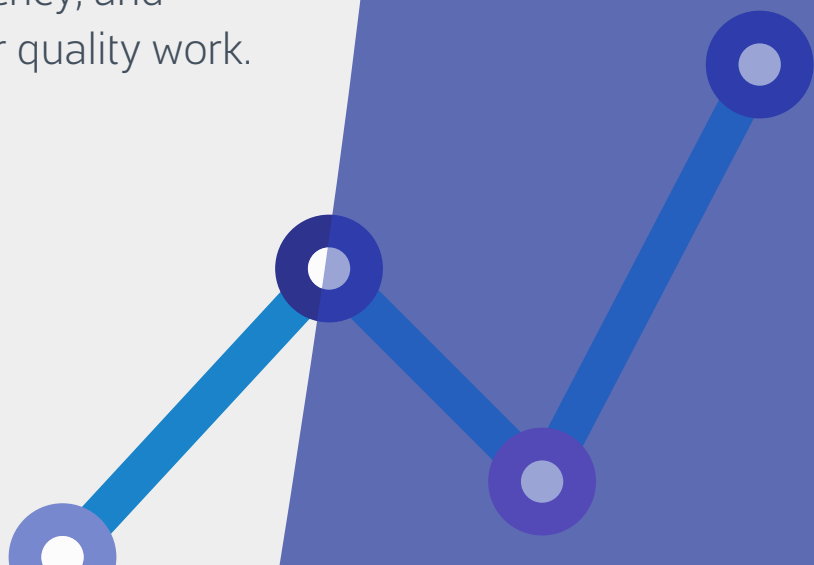
Agile is nothing new to software development, IT, and broader project management teams, but to those of us on marketing and creative teams it's one of the biggest buzzwords in the industry. For the past few years, we've heard about moving from "waterfall" to "agile," but only a portion of us know what agile marketing actually is, and best practices for implementing an agile process.

Without a doubt, an agile methodology can be extremely valuable for marketing teams. Adopting an agile process can help teams hit their KPIs, balance workloads, improve efficiency, and ultimately produce higher quality work.

This guide will share the principles, structure, and processes to implement for your team to become agile.

You'll learn:

- **What agile marketing actually is**
- **How to build a custom agile process for your team**
- **3 tips for a successful agile implementation**

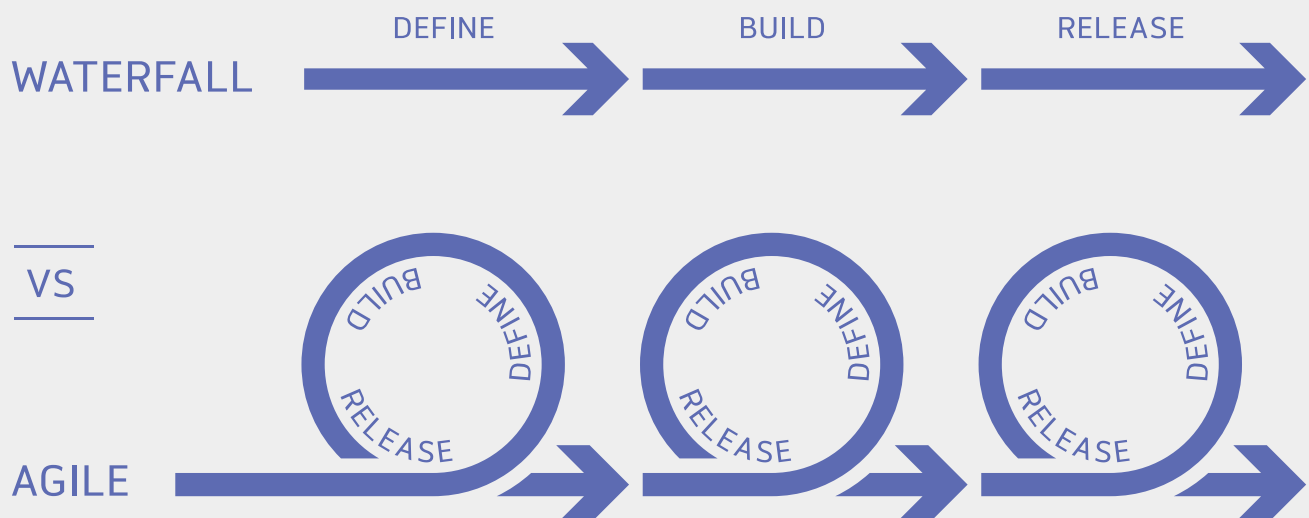


What is Agile?

Having an agile process enables teams to quickly and easily respond to change. This allows a team to be nimble and to sense check for quick wins and fast fails during a project. By breaking up a project into smaller parts, the team is able to tackle multiple sequential steps in a campaign at once, allowing for pivots mid-project if needed. In contrast is the traditional “waterfall” approach, where projects follow a linear model until they are completed.

The term “agile” is used to describe several distinct methods of organizing work based on a few guiding principles:

- Be flexible to respond to change rather following a rigid plan
- Create adaptive, iterative campaigns rather than linear “Big-Bang” campaigns
- Rely on testing and data rather than opinions and conventions
- Encourage collaboration and autonomy rather than working in silos with traditional hierarchy.



Why Agile Marketing?

While agile methodologies were originally conceived by and for software development teams, many of the principles and key elements translate easily and provide significant benefits for marketing and creative teams. By implementing an agile workflow, teams can expect to:



1. Deliver work sooner.

Work can be completed more quickly in an agile environment because tasks with dependencies are completed simultaneously. For example, in a waterfall approach, the design for an html email can't be completed without copy. In an agile approach, the email is designed with placeholder text while the copywriter simultaneously writes the copy, which is then easily slotted into the final email design.



2. Produce better work.

In an agile workflow, projects are peer-reviewed frequently, even before they are complete. Unlike the “mad men” approach of waiting to show the client (or in this case, the approving reviewers) until the final product is complete, stakeholders are “read in” throughout the entire process, from ideation all the way through final proofs. This frequent peer-review and feedback catches errors early and avoids having to start over from scratch after the project has been completed.



3. Improve team collaboration.

A huge component of agile is frequent, daily, team collaboration. This frequent communication helps team members be more in sync with each other and maintain a full view of what the entire team is working on at any given time.

How to Tailor Agile to Your Marketing and Creative Teams

CASE STUDY: A MID-SIZE AGILE MARKETING TEAM



Meet the Team

To better understand how an agile marketing methodology might be applied to a mid-size marketing team, let's first walk through the roles and responsibilities of each team member.

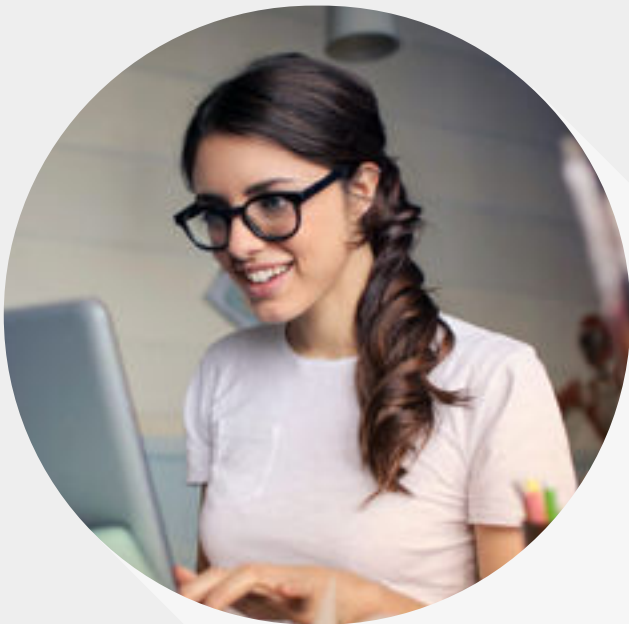
A typical mid-size marketing team includes:

- Chief Marketing Officer
- Marketing Director
- Marketing Managers
- Creative Team



Chief Marketing Officer

The CMO is the executive leadership overseeing the entire department. They are responsible for reporting to the CEO/president/board on the progress of the department towards quarterly and annual goals. Their primary role within the team is to strategize and set overarching, big picture goals for the team. Typically, the CMO is not "in the weeds" on many projects.



Marketing Director

The Marketing Director's primary role is to translate the "big picture" ideas from the CMO into actionable projects. In this team structure, the Marketing Director is also acting as a Project/Traffic Manager. By having visibility into the strategic planning from the executive team and the Marketing Managers' workloads, the Marketing Director is able to help prioritize and set individual goals for the team.



Marketing Managers

Marketing Managers function as individual contributors, focused on executing projects, or portions of large campaigns, that feed into the overall department goals. For example, each Manager has an area of focus and expertise that they own - product, content, and digital. Often, projects will have tasks assigned to multiple team members based on their area, making seamless collaboration and communication throughout the team essential to successful projects.

Creative Team

On a team of this size, the creatives can be viewed as individual contributors and are a key part of the marketing team. Just like the marketing managers, each creative will have their own area of expertise, such as web design for landing pages and html emails, graphic design, or copywriting. In an agile process, it is important that the creatives are included in all the same planning as the rest of the marketing team, since they will be the ones designing the final products.



Having an in-house design team can be a huge advantage for a marketing team.

These small teams can be folded into the marketing team, allowing the creatives to have a close, strategic, and collaborative relationship with their marketing clients. Organizations with larger in-house creative teams will have to modify this process slightly. In the situation where the creative team has its own hierarchical structure, creative leaders, such as a creative director, should sit in with the marketing team when deciding on and assigning projects. This person should function as a “representative” for the larger creative team and provide insight and feedback at a strategic level. For teams that rely on outside creative resources, like agencies and freelancers, include them in your process just as you would fellow team members.

Organization of Work

Since the original **Manifesto for Agile Software Development** was published in 2001, many methodologies in line with the original agile values have emerged. Two of the most popular are **Kanban** and **Scrum**. Kanban focuses on individual items of work, tracking them through the stages of “to do”, “doing”, and “done”. Scrum is more focused on the project level. In Scrum, projects can be broken down into individual tasks, but the focus is on completing the full project. This more holistic view tends to align more closely with how marketing teams set goals and tackle work.

It's important to remember that one of the key principles of Agile is flexibility - and that applies to the methodology as well. Marketing teams tend to gravitate towards the Scrum methodology, but creatives often like the visual way work is organized on a Kanban board. **Feel free to mix and match** components of each methodology to find the right blend for your team.

In Scrum, work is broken down into sprints, often 2 weeks in duration, but each team should choose the cycle length most appropriate to their work. During the sprint, the team will have a cadence of meetings and quick check-ins where team members can highlight obstacles interfering with projects, pivot if needed, and ultimately stay in close communication to task statuses.

The Monday of the first week of the sprint is used for project planning and 1:1 meetings between team members and their direct managers. This allows each team member to come to the weekly Team Meeting and Sprint Kickoff prepared to discuss their projects with the rest of the team.

MEETING CADENCE

SPRINT 1

WEEK ONE

- **MONDAY:** 1:1 Meetings to plan projects
- **TUESDAY:** Team Meeting, Sprint 1 Kickoff
- **DAILY:** Scrum

WEEK TWO

- **MONDAY:** 1:1 Meetings to check in on projects
- **TUESDAY:** Team Meeting, Mid-Sprint Check-In
- **DAILY:** Scrum

SPRINT 2

WEEK ONE

- **MONDAY:** 1:1 Meetings to plan projects
- **TUESDAY:** Team Meeting, **Sprint 1 Retrospective** / Sprint 2 Kickoff
- **DAILY:** Scrum

WEEK TWO

- **MONDAY:** 1:1 Meetings to check in on projects
- **TUESDAY:** Team Meeting, Mid-Sprint Check-In
- **DAILY:** Scrum

1:1 MEETINGS:

The first meetings of the week are 1:1 meetings between each Marketing Manager and the Marketing Director. The Marketing Director also meets with the CMO. These meetings are used to break down larger projects into blocks of work that will be delivered at the end of each sprint. For example, preparing to attend a major industry event would be a project that would span several sprints. By using work groups and consistent naming conventions, the team can break the project into two-week sprints with work divided among multiple team members.

SPRINT KICKOFFS:

During Sprint Kickoffs, the team meets as a whole, including the CMO, to discuss project statuses and coordinate each team member's role in the project. For projects like an industry event that spans multiple sprints, the team uses this meeting to discuss the work for the upcoming sprint, as well as overall progress on the project to identify any obstacles or changes needed to stay on track with the overall timeline.

MID-SPRINT TEAM CHECK-INS:

During a two-week sprint, the team has mid-sprint check-ins where they provide updates on sprint tasks and identify any roadblocks that would prevent them from completing any work due during the sprint.

SCRUMS:

Many agile teams also practice daily stand-up meetings where the team takes 15 minutes to quickly run through what work was completed the previous day, and what each team member will be working on that day. Teams can use work tracking "boards", like Kanban boards, to guide these meetings. Smaller teams may not need to have one of these stand-ups every day. Regardless of what cadence works best for your team, be sure that the team has the infrastructure to stay in close communication during the sprint.

SPRINT REVIEWS:

In the development world, sprint reviews are a company wide/public meeting where the team presents its work to the whole organization. For marketing and creative teams, most projects span multiple sprints and are already more public-facing – for example events and content pieces – which the company is often aware of, making a formal sprint review redundant. A good alternative is a project or campaign review where the marketing and creative teams can share their final project KPIs.

SPRINT RETROSPECTIVE:

At the end of each sprint, it is important to review what was done in the previous sprint. Often, marketing and creative teams start their sprint kickoff meetings with a quick retrospective which serves as a progress report for the large projects that cover multiple sprints. It is also critical to the agile process to use this time to discuss any quick wins and fast fails so the team can repeat the strategies used for successes and avoid repeating similar mistakes in future sprints.

PROJECT DEBRIEFS:

At the end of each major project, the team will schedule time independent from sprint kick-offs to discuss how the project went. This meeting typically starts with a quick review of KPIs, while the rest of the time is spent discussing what did or did not go well throughout the entirety of the project. The objective is to celebrate a successful project and continuously learn and improve processes so the team can perform even better the next time around. It is important to note that it is not a format to single out individual's performance in the project; those conversations should be during 1:1 meetings.

Tools of the Trade

When considering moving to an agile process, the first question teams ask is often “what software will I need?” Having the right tools to support your new workflow is crucial to the successful implementation of an agile process. Key software in the lineup are collaboration tools and project management.

For marketing and creative teams, the ideal solution to their creative workflow needs would include request intake, project management, online proofing, and a robust reporting suite. With unique challenges like these in mind, Lytho Workflow offers marketing and creative teams all the features they need to support their agile process:



- **Collaborative Request Intake** allows creative teams to get all the information they need to kick off projects quickly.
- **Dynamic Work Views** including Kanban, Custom Views, Gantt Charts, and Calendaring help agile teams see all their work at-a-glance and support daily and weekly team meetings.
- **Dependencies & Resource Management** create transparency about who is working on what, when, and how other tasks are impacted.
- **Continuous Collaboration** like @mentioning, comments, file sharing, and in-app and email notifications help teams collaborate seamlessly through the entire workflow and document decisions to create audit trails.
- **Automation** keeps work moving. Automated routing for proofs, Auto Naming, Auto Numbering, and Automatic Date Calculations keep your work organized so you can focus on what matters.
- **Reporting** allows agile teams to track, collect, and share important information about their work, including volume of new requests and work, cycle and lead times on projects, and bottlenecks in the workflow.

Tips and Considerations for Going Agile

If your marketing and creative teams are thinking about implementing an agile marketing methodology, there are a few things you should consider in order to build the best process for your team.

1. How big is your team?

Team size and structure are important considerations for questions such as how you'll need to structure the cadence of team meetings, and if a software would be a good fit for your team to manage their agile process.

2. What are your goals, and how do you report on them?

Prior to building out an agile process for your team, it is important to identify what KPIs you will want to measure to ensure the structure of your process will support them. Here are few questions to help get you thinking about what you should be tracking:

- How often to do you set goals? Monthly, quarterly, annually?
- How are you currently reporting on them?
- Are there gaps in your current reporting?

3. How can your team pare down work into sprints, and what does being iterative look like?

Depending on project size and length, it can be pretty easy to see how to break up projects into segments. A project that will take two weeks to complete will be a great fit in an agile process; however, for longer, more complex projects, it might take some upfront planning at first to see where

natural segments fall. For example, a large tradeshow is a huge project that will span over multiple sprints with various task types like logistics planning, multiple types of creative assets and production times, and much more. There are a few natural segments like travel logistics and booth design, but as you are getting up and running in an agile process, you might need to spend a little more time in sprint kick-off meetings just to make sure you aren't over-booking your sprints.

4. What is wrong with your current process?

It's important to think about why you are considering switching to an agile process in the first place, and to set objectives for what the new process should accomplish for you. Do you want to increase the volume of work your team completes? Do you need to work faster? Do you want to produce more variety and higher quality content? You probably want to do all these things, and you probably also have some specific challenges unique to your team. Before spending the time, money, and team effort on process changes, think through what you want to accomplish and how agile can do that for you. Spending the time to build out an agile process with specific goals and objectives and how your team will meet & measure them will help foster team buy-in and a successful transition to an agile marketing process.

Once you commit to an agile process, you want to ensure that you have a successful implementation. Here are 3 tips to making a smooth transition:

1. Customize your workflow.

Agile is not one-size-fits-all. Don't be afraid to build a custom process that works for your team's unique needs. Allow the team to contribute and provide input throughout the process. If they have an active role in shaping the process, they are more likely to adopt it faster.

2. Audit your tools.

The best tools and software for your team are unique to you. When implementing a new process, it is always helpful to audit your current MarTech stack and do a performance check. This will help you identify which tools work for your team, where there are overlaps in functionality, and if parts of your stack can be eliminated or expanded on.

Once you've audited your tools, you can start to build out your agile process operationally. As you outline the process, you will be able to easily identify gaps in your toolkit and start evaluating new tools. Criteria to keep in mind:

- Choose software that is purpose-built for marketing and creative teams. Marketing and creative teams work differently than IT or development teams, and it can be frustrating to try to conform processes just to fit a software.

- Make sure there is proofing functionality that allows your team to share, review, and approve proofs online. Extra points for software that includes proof routing and reporting on key metrics related to proofs.

3. Commit to the process.

Any time a team introduces a new process, it can be tempting to abandon it when the first snag comes along. While the point of agile is not to trap a team into a process that slows them down or hinders their ability to work effectively, it is still a process. Team buy-in is crucial for a successful implementation of a new process.

- When complications arise in the process, view those not as failures, but as opportunities to optimize.
- Take time in the Sprint/Project Retrospective meetings to review how the process itself is working.

If you are tempted to revert back to old processes, take a minute to review the goals and objectives outlined for the agile process. If they still align, go back to tip #1 and review your workflow for additional customization.



In Closing...

Agile project management can be a great tool for marketing and creative teams to streamline their workflows, get more done in less time, and even strengthen the relationships within their team and with stakeholders. However, it's important to remember that agile is a tool in your toolkit, and it should work for you, not you work for it. Never hesitate to reassess and change things up if you need to scale or improve your process. Each team is unique, so as your team begins to build out their agile process, don't be afraid to keep what works and leave the rest. Ultimately, to be agile means to be able to move quickly and adapt easily, so use this framework to develop the best process for your team.

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