



# Agile Marketing 101

Raechel Duplain  
Workfront



# Speaker



**Raechel Duplain**

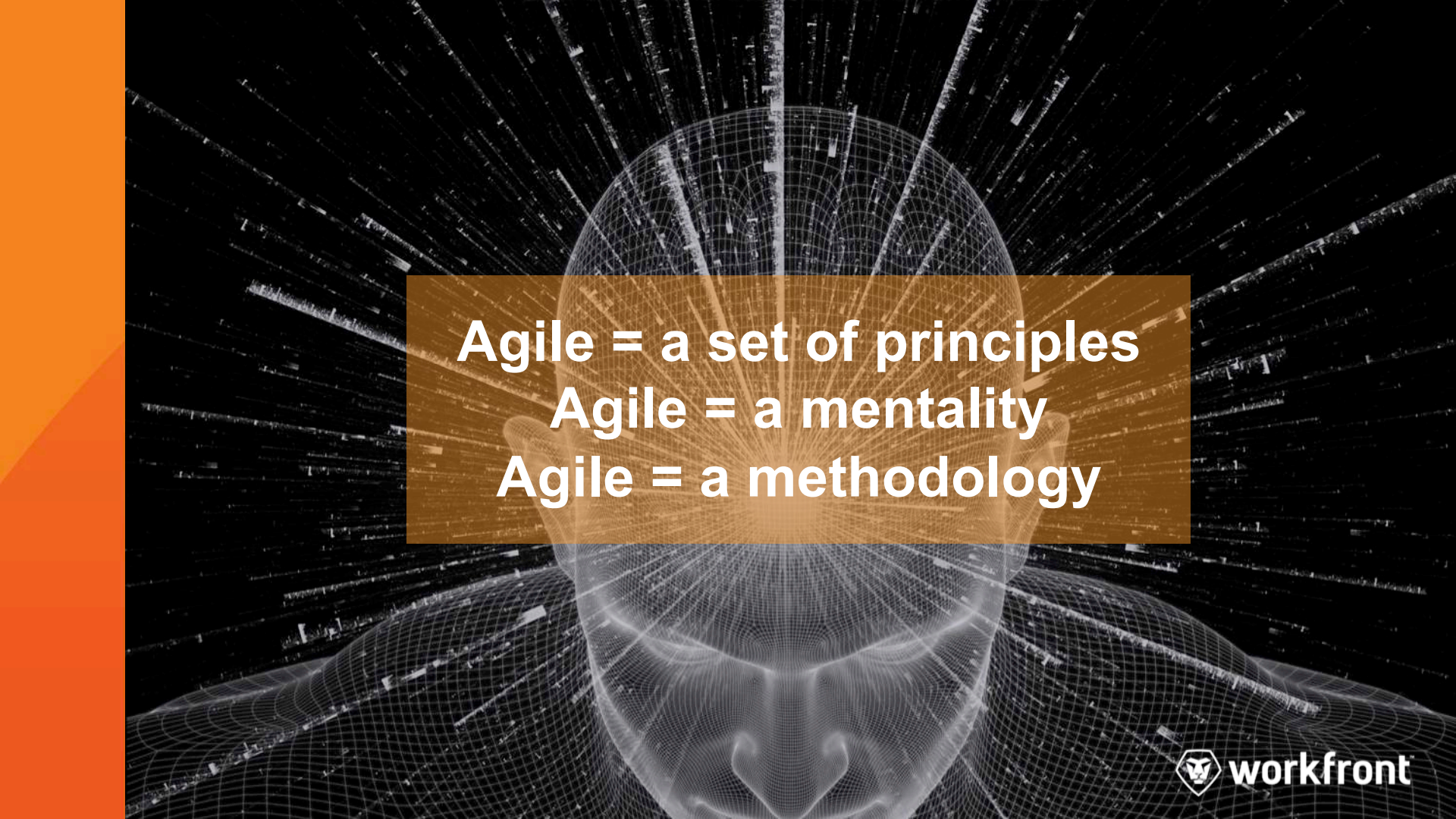
Sr. Marketing Program Manager

Certified ScrumMaster

Workfront

Twitter: @raeduplain

# What is Agile Marketing?

A wireframe human head is centered in the image, rendered in a light gray color. The background is a dark, almost black, space filled with numerous white lines that radiate outwards from the head, creating a sense of depth and digital connectivity. The lines vary in length and thickness, some appearing as thin filaments and others as thicker, more prominent beams. The overall effect is that of a digital or neural network. In the bottom right corner, there is a logo for 'workfront' which consists of a stylized white icon of a person's head and shoulders inside a hexagon, followed by the word 'workfront' in a lowercase, sans-serif font.

**Agile = a set of principles**  
**Agile = a mentality**  
**Agile = a methodology**

# Agile Marketing Guiding Principles

Individuals & interactions OVER processes & tools

Responding to change OVER following a plan

Many small experiments OVER a few large bets

Testing & data OVER opinions & conversations

Intimate customer tribes OVER impersonal mass markets

Engagement & transparency OVER official posturing



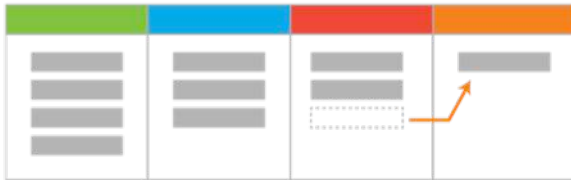
# How do marketers apply Agile to their work?

# Agile Work Management Frameworks

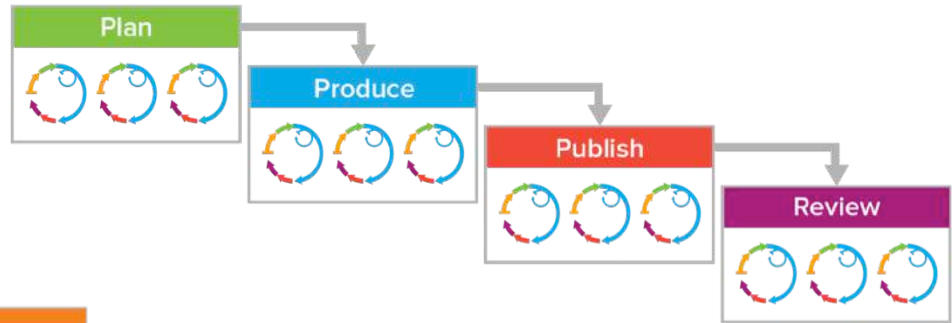
SCRUM



KANBAN



MIXED-METHODOLOGY



A grayscale photograph of a person's hands typing on a keyboard in front of an Apple iMac monitor. The image is dimly lit, with the text overlaid in white. An orange decorative shape is on the left side of the image.

**How are marketers currently  
managing their work?**

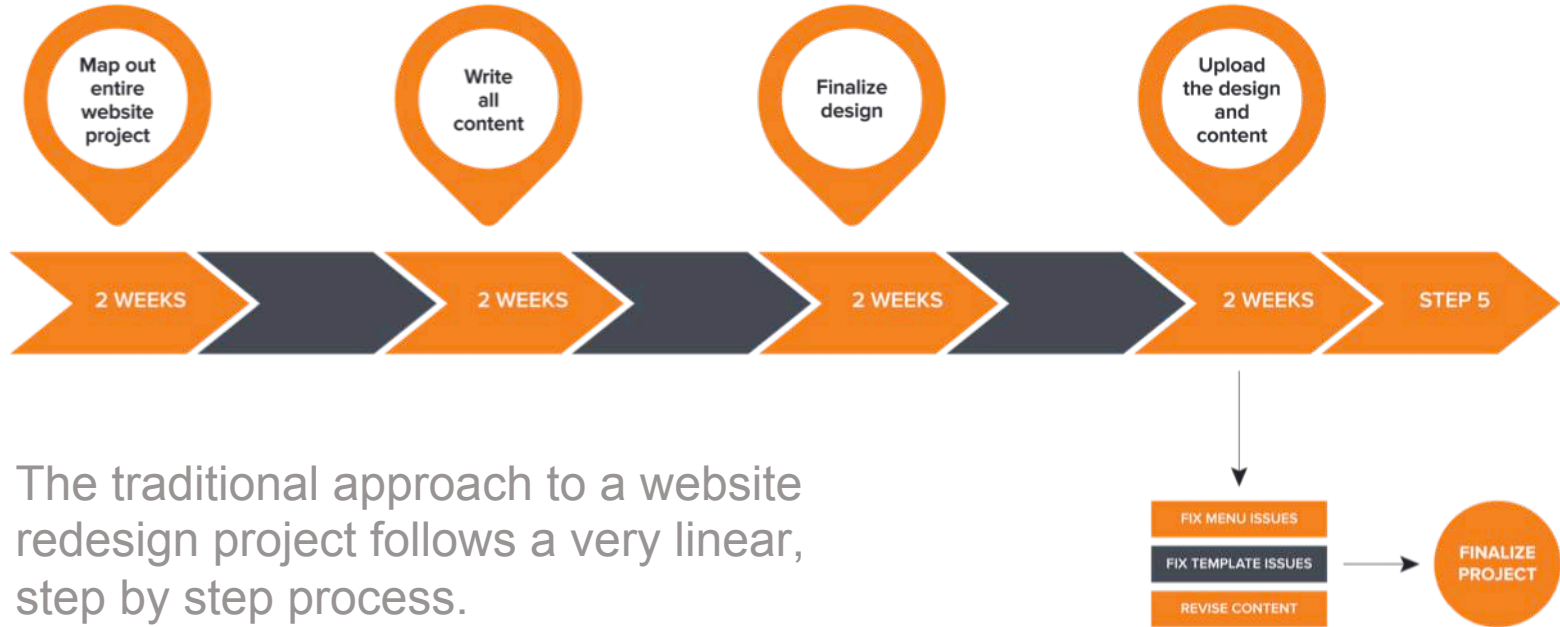


A grayscale photograph of a waterfall cascading over a rocky cliff. The water is white and frothy as it falls. The background is dark and textured, showing the rugged surface of the rock. On the left side of the image, there is a vertical orange bar that tapers towards the top.

# Waterfall methodology

Traditional, top-down/cascading project management.

# Waterfall Project Management

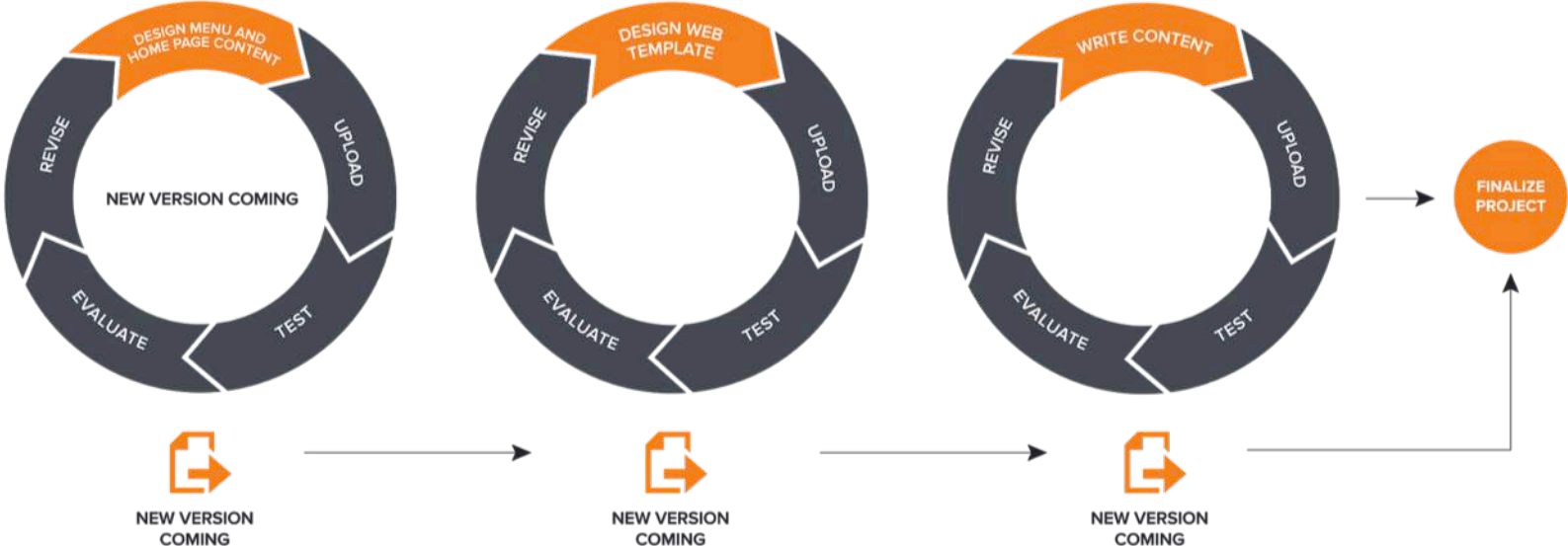


The traditional approach to a website redesign project follows a very linear, step by step process.

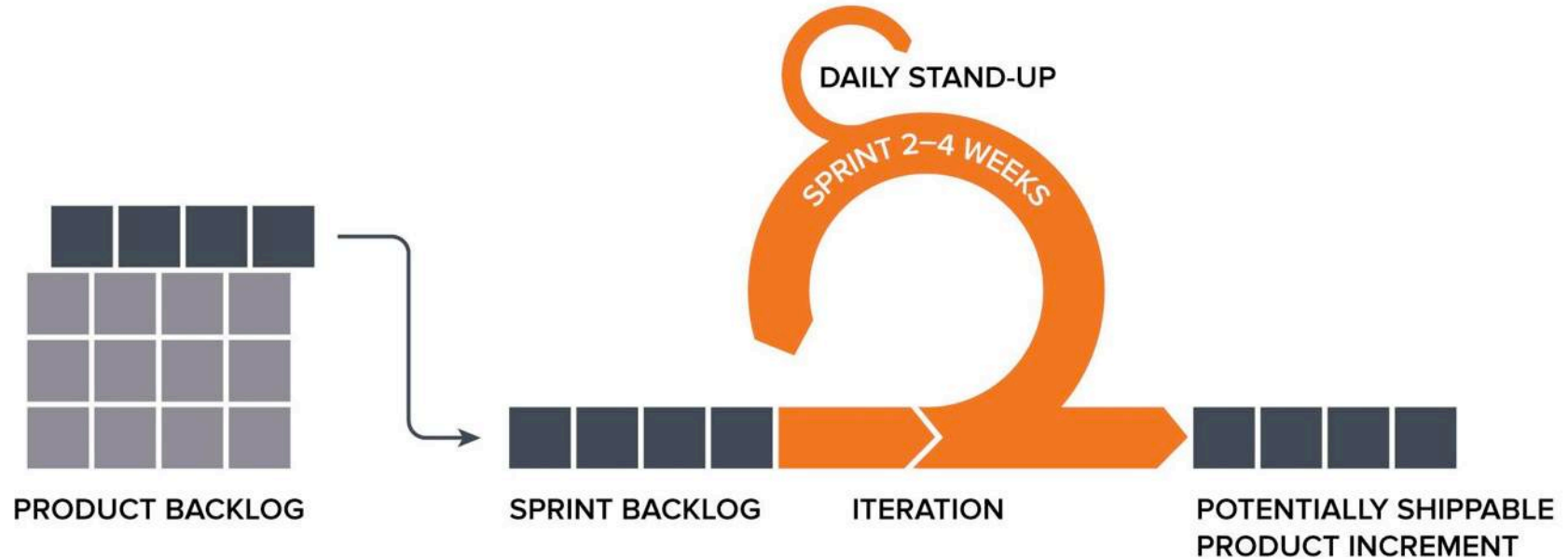
# The Problems with Waterfall

- **Rigid Planning**  
Requires a knowledge of an exact outcome during early planning
- **Rigid Timelines**  
Takes several months, even years to deliver projects/campaigns

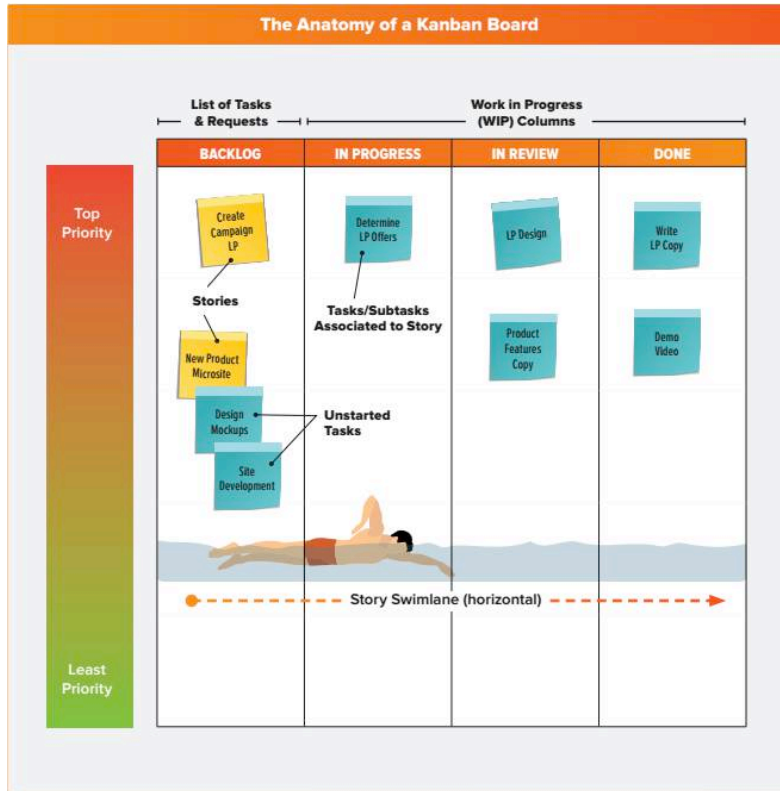
# Agile Workflow



# Scrum = Faster Time to Market



# Kanban = Ongoing Rapid Delivery



## CHARACTERISTICS

- Rigid due dates
- High volume of work due at once
- No sprints
- Continuous prioritizing
- Entire team works on top priorities first

A silhouette of a person jumping over a mountain range against a dark sky. The person is in mid-air, with arms and legs spread out. The background is a dark, cloudy sky. The foreground shows the dark silhouette of a mountain range.

# The value of Agile Marketing

## 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

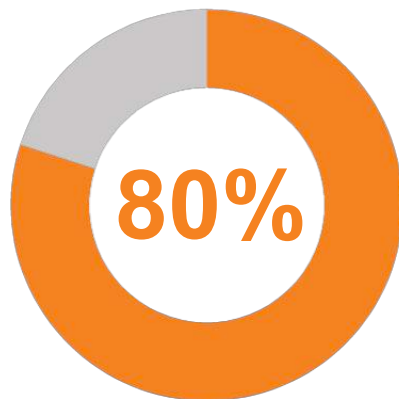
**80%** said adopting Agile led to an enhanced prioritization of the things that matter

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

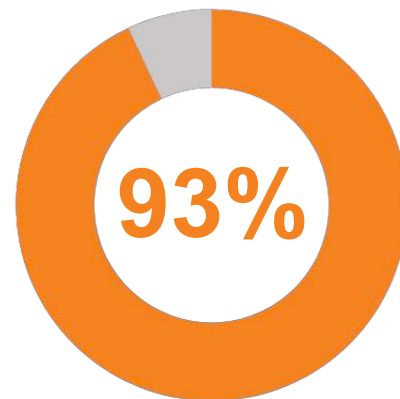


# 3X

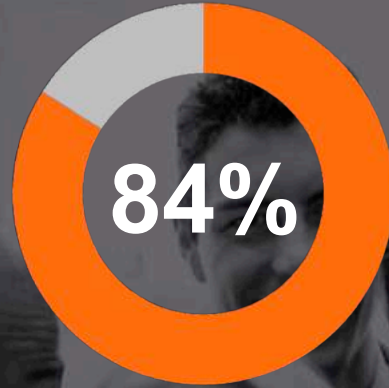
**Marketing departments that consider themselves Agile are 3x more likely to significantly grow market share.**



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



**93% of marketers say Agile helped them switch gears quickly and more effectively**



of respondents experienced  
**improved team morale** when  
adopting Agile methodology



**A few key terms...**

# Key Scrum Roles

- **Scrum Master** - Appointed/elected by the team. Runs meetings, advocates/moderates for the team.
- **Product Owner** - Liaison between the team and all key stakeholders. Helps team determine priorities for each sprint.
- **Team member** - Every other contributor on the team.

Scrum teams are typically self organizing. Teams should be small: 3-7 people each.

# Agile Terminology Cheat Sheet

[www.workfront.com/agile-marketing](http://www.workfront.com/agile-marketing)

Download the Level 1:  
Cheat Sheet asset.

The graphic is a cheat sheet titled "Agile Marketing Cheat Sheet" from Workfront. It is divided into several sections: "What is Agile Marketing?", "Principles of Agile Marketing", "Waterfall vs Scrum", "Modified Scrum or Mixed Methodology", and "Scrum Terms & Definitions". Each section contains bulleted text and small icons representing different agile concepts.

**workfront** Agile Marketing Cheat Sheet

### What is Agile Marketing?

Agile Marketing is a methodology for managing marketing work that emphasizes visibility, collaboration, adaptability, and continuous improvement. Many Agile practices exist that adhere to Agile principles, but the most common Agile practice for marketers is "Modified Scrum"—an adaptation of Scrum, an Agile practice widely used in software development.

#### Principles of Agile Marketing

- Customer satisfaction by early and continuous delivery
- Encouraging the team to be more involved, visible, and accountable
- Ensuring changes and adapting quickly
- Recognizing and celebrating team achievements
- Close, daily cooperation among teams
- Reflecting regularly on how to be more effective and adjusting accordingly
- Continuous attention to quality content and design
- Remembering that simplicity is essential

Waterfall	Scrum
<ul style="list-style-type: none"><li>The name for traditional top-down project planning</li><li>Projects planned in sequential tasks from start to finish</li><li>Rigid, hard deadlines and specific order of completion</li></ul>	<ul style="list-style-type: none"><li>A work management practice that applies Agile principles</li><li>Work organized into shorter, faster iterations and continuous requirements</li><li>Flexible, adjustable to rapid changes, deadlines become less rigid</li></ul>

#### Modified Scrum or Mixed Methodology

- A customizable combination of Waterfall planning and Scrum practices
- Adaptive to change, but can support hard deadlines
- Supports different Agile team types & styles
- Allows one team to work in Scrum and another team to work in Waterfall harmoniously

#### Scrum Terms & Definitions

- Scrum** – An Agile practice in which a small team works as a unit to reach a common goal as opposed to a traditional, sequential approach. 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 and projects assigned to an Agile team. Backlog items are called stories and are prioritized according to the points assigned to them.
- Sprint** – A 2-4 week 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 with an allotted story point value to determine the effort required to accomplish it. Requests or projects are converted to stories before being moved from the backlog to a sprint.
- Story Points** – An estimation unit that measures the complexity and hours required to complete a story.
- Storyboard** – A visual chart (e.g., whiteboard or work management solution dashboard) with cards or sticky notes that represent all the work in a given sprint. The cards move across the board to show progress.
- Sprintlines** – Columns that break up a storyboard into story statuses. Typical sprintline titles include "ready to start," "in progress," "awaiting approval," and "done." Story cards progress across sprintlines during a sprint.



# Four key elements to Scrum

1

# The backlog



Teams People Resource Planning

## Creative ▾

Team Settings | Team Actions ▾



Iterations **Backlog** Updates Working On Issues

Unplanned All

+ New Story Plan Iteration Export ▾

View Backlog ▾

<input type="checkbox"/>	Order ↑	Name	Parent	Estimate	Ready
<input type="checkbox"/>	1	Production	Fall Sale Email	2.00	
<input type="checkbox"/>	2	Identify Audience	Email Creation	0.00	
<input type="checkbox"/>	3	Create Layout	Create Copy & Layout	2.00	
<input type="checkbox"/>	4	Inbox Q/A	Email Creation	0.50	
<input type="checkbox"/>	5	Implement Approved Production Changes	Implement Approved Changes	1.00	
<input type="checkbox"/>	6	Initial Copy	Create Copy & Layout	2.00	
<input type="checkbox"/>	7	Creative Review	Creative	2.00	
<input type="checkbox"/>	8	Final Review	Fall Sale Email	0.00	
<input type="checkbox"/>	9	Send Email	Fall Sale Email	0.12	
<input type="checkbox"/>	10	Proofread Creative	Creative	1.00	
<input type="checkbox"/>	11	Final Layout	Create Copy & Layout	2.00	
<input type="checkbox"/>	12	Create Template in ExactTarget	Email Creation	0.00	
<input type="checkbox"/>	13	Populate Lists in ExactTarget	Email Creation	0.00	
<input type="checkbox"/>	14	Proofread Copy	Create Copy & Layout	0.50	

Showing 21 stories





# The sprint

# 2

# Sprint planning meeting

- Review backlog
- Prioritize stories
- Estimate hours
- Make assignments
- Populate (and commit to) sprint

# Who attends?

- Core production team
- ScrumMaster
- Product Owner
- Stakeholders / Requesters



Teams **People** Resource Planning

# Creative ▾

[Team Settings](#) | [Team Actions ▾](#)



Iterations **Backlog** Updates Working On Issues

Unplanned All

+ New Story **Plan Iteration** Export More ▾

View Backlog ▾

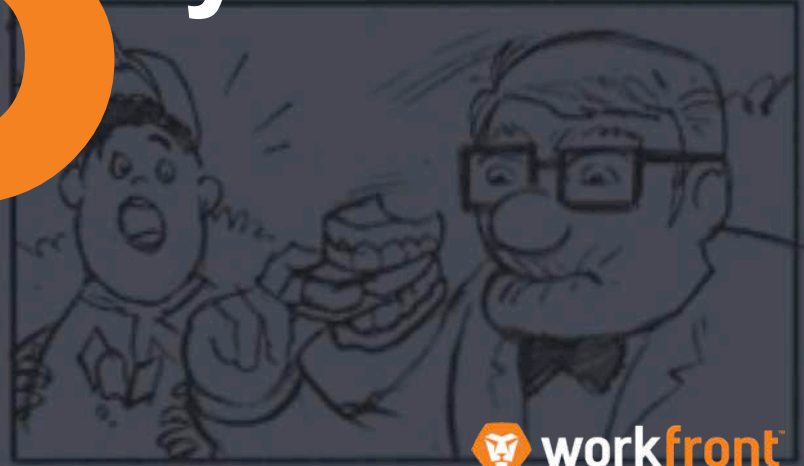
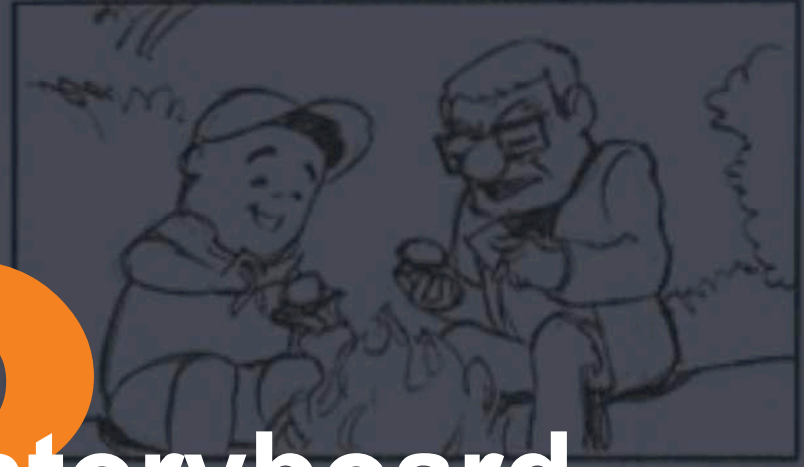
<b>Iteration Name</b>	<b>Start Date</b>	<b>End Date</b>	<b>Focus</b>	<b>Capacity</b>
Top Gun - Maverick	May 9, 2016	May 13, 2016	80 %	15
Goal				
Kick off the Fall Sale campaign.			Total Points: <b>19.12/12</b> <b>Save</b> <b>Cancel</b>	

Order ↑	Name	Parent	Estimate	Ready
✓ 1	<b>Production</b>	Fall Sale Email	2.00	
✓ 2	<b>Identify Audience</b>	Email Creation	0.00	
✓ 3	<b>Create Layout</b>	Create Copy & Layout	2.00	
✓ 4	<b>Inbox Q/A</b>	Email Creation	0.50	
✓ 5	<b>Implement Approved Production Changes</b>	Implement Approved Changes	1.00	
✓ 6	<b>Initial Copy</b>	Create Copy & Layout	2.00	
✓ 7	<b>Creative Review</b>	Creative	2.00	
✓ 8	<b>Final Review</b>	Fall Sale Email	0.00	
✓ 9	<b>Send Email</b>	Fall Sale Email	0.12	

Showing 21 stories

# The visual storyboard

# 3





Teams People Resource Planning

# Creative

Team Settings | Team Actions



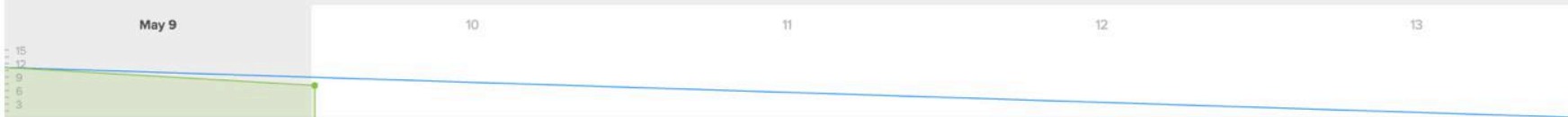
Iterations Backlog Updates Working On Issues

## Top Gun - Maverick

All Iterations



Completed Stories <b>2 of 15</b>	Completed Points <b>4 of 11.12</b>	Points Per Day <b>4.00</b>	Estimated Completion <b>May 11, 2016</b> (-2 working days)
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Stories	New	6.62	In Progress	0.50	Awaiting Feedback	2	Complete	2
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> **Create Copy & Layout**  
 Fall Sale Email  
**4.25 / 8.5 Points Complete**  
 50% Complete  
 + Add Subtask

> **Proofread Copy**

> **Create Layout**

> **Initial Copy**

> **Creative**  
 Fall Sale Email  
**0 / 4 Points Complete**

> **Proofread Creative**

> **Present and Review Creative**

> **Creative Review**



**Continually measure & evaluate**



Teams People **Resource Planning**

# Creative ▾

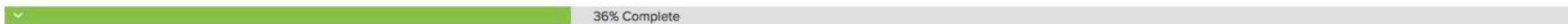
[Team Settings](#) | [Team Actions ▾](#)



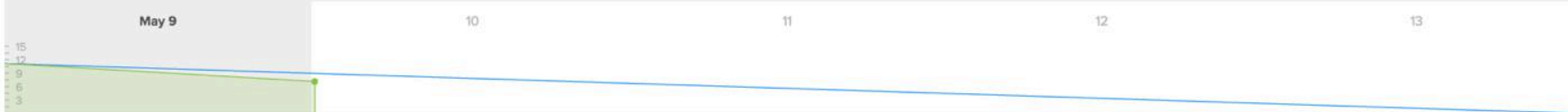
**Iterations** Backlog Updates Working On Issues

## Top Gun - Maverick

[All Iterations](#)



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> **Proofread Copy**

> **Create Layout**

> **Initial Copy**

▾ **Creative**  
 Fall Sale Email  
**0 / 4 Points Complete**

> **Proofread Creative**

> **Present and Review Creative**

> **Creative Review**



# Daily Scrum meetings

- A.K.A. Daily stand-ups
- Team and ScrumMaster meet
- Everyone stands. 15 mins max
- Daily status report
- Discuss and remove impediments

# Sprint retrospective

- Review sprint performance
- Identify ways to improve process
- Make at least one change—treat sprints as an ongoing process experiment

# Sprint review

- Meet with team and stakeholders
- Review sprint goals
- Review deliverables
- Discuss potential changes
- Ship product

# Adopt Agile at your own pace

Where do we begin?

We're Agile...ish

Team Agile

We got this!

# Fall Campaign In-Store Banner Ads

Edit Project | Project Actions

Project Owner  
Admin User



Status	Condition	Planned Completion
Current	On Target	Jul 30, 2016

- Tasks
- Project Details
- Updates
- Documents
- Issues
- Risks
- More

View Agile



Project Status <b>Current</b>	Planned Hours Complete <b>140.42 of 229</b>	Average Hours Per Day <b>3.60</b>	Estimated Completion <b>Jul 29, 2016</b> (-1 working day)
----------------------------------	--	--------------------------------------	--



New 66    In Progress 33    Complete 62

> Screenshots for Adobe webpage

> Edit designed catalogue

> Provide edits to product catalogue

> Messaging - final

> Design

> New Adobe integrations webpage

> Gather requirements

> Messaging

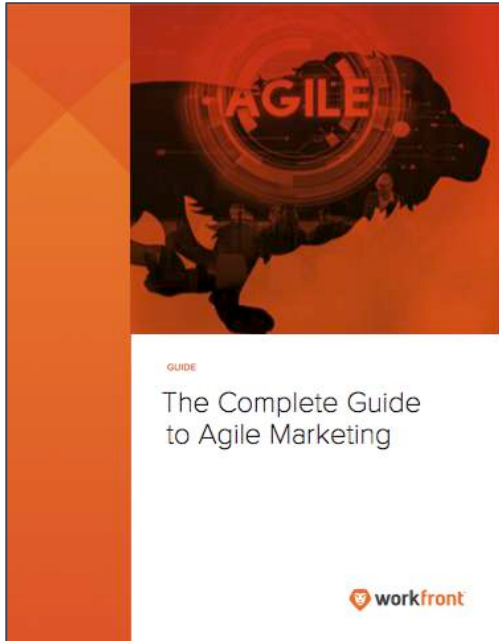
> Messaging - creation



*Unleash Your*  
**AGILE**

# Questions?

Visit [www.workfront.com/agile-marketing/](http://www.workfront.com/agile-marketing/)



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### Agile Marketing Sprint Calculator

The Agile Marketing Sprint Calculator below is a useful sprint planning tool designed to help your Agile team determine individual and team sprint capacity. Simply select the number of team members on your Agile team, then begin completing the table according to everyone's schedule.

**Sprint Capacity Calculator**

Number of Team Members:  Length of Sprint:

Team Member	Team Role	PTO Available	Manager	Sprint	Availability
Team Member Name	80	0	0	80hrs	100%
Team Member Name	80	0	0	80hrs	100%
Team Member Name	80	0	0	80hrs	100%
<b>Team Total</b>	<b>240</b>	<b>0hrs</b>	<b>0hrs</b>	<b>240hrs</b>	<b>100%</b>

**Total Available Hours for the Sprint: 240hrs** 0% avail **Team % Availability for the Sprint: 100%**



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