Getting Started with the Agile Marketing Navigator

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In association with

MarTech is marketing.

Introduction

There's no easy, consistent way to implement agile marketing. At least there hasn't been until now. We tapped several members of the agile marketing community, from marketing VPs to on-the-ground agile coaches, to help us answer the question, "How can we help our community better implement agile marketing?"

As an agile coach and trainer, I want to make going from agile theory to agile in practice easier than it is today. So often, my agile marketing students were always asking me, "Do you have a roadmap or guide for what I do next?" And, of course, I'd answer with, "Agile implementation is unique and different at every company, so experiment and see what works for your organization." While that's not an untrue statement, I don't think it's the most helpful answer.

For some companies, bringing in an agile coach for several months is a great way to help get agile marketing off the ground. However, not all companies can afford a coach, but even small companies can benefit from agile marketing.

There are some great agile frameworks today, such as Scrum and Kanban. And they've done a fantastic job working as intended with software teams around the world. It's only because of the consistent, widespread adoption that agile is now the norm in software development.

However, what we're seeing in marketing is a different story. The frameworks are being modified, cobbled together, or altogether implemented in new and unintended ways, hurting the adoption of agile marketing. We knew that marketers deserved a solution suitable for them that appeals to the fast-paced and highly creative work that happens in marketing. Marketers shouldn't have to learn multiple frameworks and adapt them to their world.

Introducing *Agile Marketing Navigator*, a flexible framework for navigating agile marketing.

Agile Marketing Navigator has four parts:

1. Collaborative planning workshop
2. Launch cycle
3. Six key practices
4. Six roles

This ebook serves as a guide to getting started with the *Agile Marketing Navigator*. In the following chapters, we'll go into depth on the four parts and how you can start using them at your company.

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Stop #1: Collaborative Planning Workshop

Chapter 1: Aligning on a Guidepoint

To begin with, we'll start at the top with the Collaborative Planning Workshop. The Collaborative Planning Workshop brings alignment to what the team is trying to achieve and empowers marketers to focus on customer value and business outcomes over activity and outputs. This session should happen quarterly or at the start of any large campaign or initiative.

Where most agile frameworks begin with the backlog of work for the team, we found it very important to start at a higher level and ensure alignment is happening between the agile marketing team and the key stakeholders asking for work from the team.

One of the biggest challenges we're addressing with the Collaborative Planning Workshop is the disconnect between the stakeholders who ask for work and the team on the hook for delivery. Way too often, the people setting the marketing strategy and the designers, copywriters, social media specialists and others don't have a seat at the adult table. Work comes to them in the form of the creative brief via an electronic system, but there's no conversation. They aren't being treated like marketers but rather as producers of output.

The Collaborative Planning Workshop is just what it says — a collaborative conversation where everyone is on an equal playing field and striving towards successful outcomes.

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The Guidepoint

This framework begins with everyone understanding the actual business reasons for success and alignment on a Guidepoint. Here's how we define the Guidepoint in the Agile Marketing Navigator:

"The Guidepoint helps the team and stakeholders navigate what success looks like for an upcoming campaign or project. Stakeholders come to the workshop with a business goal for the organization. During the workshop, the group comes up with a short written description, called a Guidepoint, of what success looks like for this marketing initiative and how it aligns to the organization's goals."

The Guidepoint is the connective tissue that rolls upward and downward in the organization. It's often the forgotten middle layer between what the stakeholder is on the hook for and the tactics executed by the marketing team to achieve success.

Business Goal

Stakeholders aligh on the goal that the team will be driving to in this initiative or quarter prior to the Collaborative Planning Workshop.

Guidepoint

At the start of the Collaborative Planning Workshop the agile marketing team and stakeholders agree on a Guidepoint, the main focus for success that aligns to the business goal.

The Guidepoint aligns the agile marketing team and stakeholders on a shared purpose and creates a focus on the team's outcomes. It also helps with prioritization, so work that's not aligned gets a lower priority or isn't done at all.

Here are a few example scenarios to get you started:

Industry: Healthcare

Business Goal: Acquire an additional 5,000 new patients during the first year after the grand opening of our new hospital.

Guidepoint: Create a campaign targeting elective surgery candidates that generates 1,500 leads that ultimately generate a higher than average conversion rate than the industry average.

> "The Guidepoint aligns the agile marketing team and stakeholders on a shared purpose and creates a focus on the team's outcomes.

Industry: Retail

Business Goal: Increase cart checkout dollar amounts by 10 percent over last year.

Guidepoint: Launch a campaign targeting suggestive add-on purchases, moving the average cart checkout price to $50.

Industry: Financial Services

Business Goal: Generate a 25% increase in our personal finance app downloads in 2022.

Guidepoint: Generate an average of 50 new downloads apps with an activation rate of 25%.

Ideally, you have an agile marketing team formed with a straight line to a stakeholder and business goals that need to be achieved, which makes it pretty easy to focus on a single Guidepoint at a time.

However, many marketing teams haven't streamlined this way and must support multiple lines of business at once. In those cases, we suggest no more than three Guidepoints at once for the team, or they'll quickly lose focus. If this becomes problematic, the marketing owner on the team will need to work with key leaders to determine the most important business goals for the organization and prioritize them accordingly. Some teams have had great success determining percentages of time each stakeholder gets based on the business value of their line of business.

We can only succeed for a clear, focused outlook on what success looks like for the marketing team and the organization as a whole.

Stop #1: Collaborative Planning Workshop

Chapter 2: How to hold a successful Brainstorm session

The business stakeholders and all team members should participate in the Brainstorm. Even though the stakeholders aren't the ones doing the work and may not be as in tune with how it all comes together, leveling the playing field and working as equals often leads to better empathy between everyone, and quite frankly — better ideas from different perspectives.

To get started, make sure that you have a place where ideation can happen. For virtual teams, a sticky note tool like Mural is great for everyone to be able to easily submit ideas. If you're in a co-located office, find a conference room with plenty of sticky notes and wall space.

Next, make sure there's a facilitator who can provide clear expectations, watch the time and ensure that everyone is participating. Typically, this is done by the Agile Champion on the team. This role may also participate in the brainstorm.

While there's no 'right' way to hold a brainstorm, I've found that providing everyone with what's expected of them makes it go smoother. Here are some things I've tried:

- Everyone should submit at least five ideas.
- Your ideas should be something executable to the marketplace (avoid things like "research" or "plan" as those are internal tasks).
- Try to be as specific as possible. Rather than say, "Social post" say something like "Patient stories on social media" (in a healthcare context — see below).
- The timebox is…. (15 minutes is typically enough time).
- Ask the group if they'd like silence for brainstorming, or music in the background. I've had some teams where someone offers to be the DJ!

Ask the group if they'd like silence for brainstorming, or music in the background. I've had some teams where someone offers to be the DJ!

Brainstorming a healthcare Guidepoint

Here's an example from a team of marketers from a healthcare system. Their Guidepoint was:

"Market the opening of a new state-of-the-art birthing center by reaching 2,500 expecting parents living within a 10-mile radius. Once the birthing center opens, 25% of them come to our hospital."

Here are some of the ideas that they generated through the brainstorm activity:

The brainstorm is a really important part of agile marketing. It helps ensure creative thinking can happen that's truly aligned with the business outcomes that the team is trying to achieve. This activity replaces work requests that come through to the team without any conversation. The brainstorm is an empowering event for marketers — plus it's a lot of fun!

Stop #1: Collaborative Planning Workshop

Chapter 3: How to determine the minimally viable launch

Traditionally, marketers have worked using the "Big Bang" campaign approach, where planning was done upfront, and marketing was released without any built-in time to inspect, adapt and make smart pivots. With today's easy and instantaneous access to campaign performance data, agile marketing allows marketers to become real business leaders — taking what works and scaling up, looking for underperforming assets and stopping.

This way of thinking starts with the team and its business stakeholders having a shared understanding of what's minimally viable — meaning what is just enough of the marketing campaign or plan to test and learn from, committing to just those items, and deciding later if the remaining ideas will come into play or not.

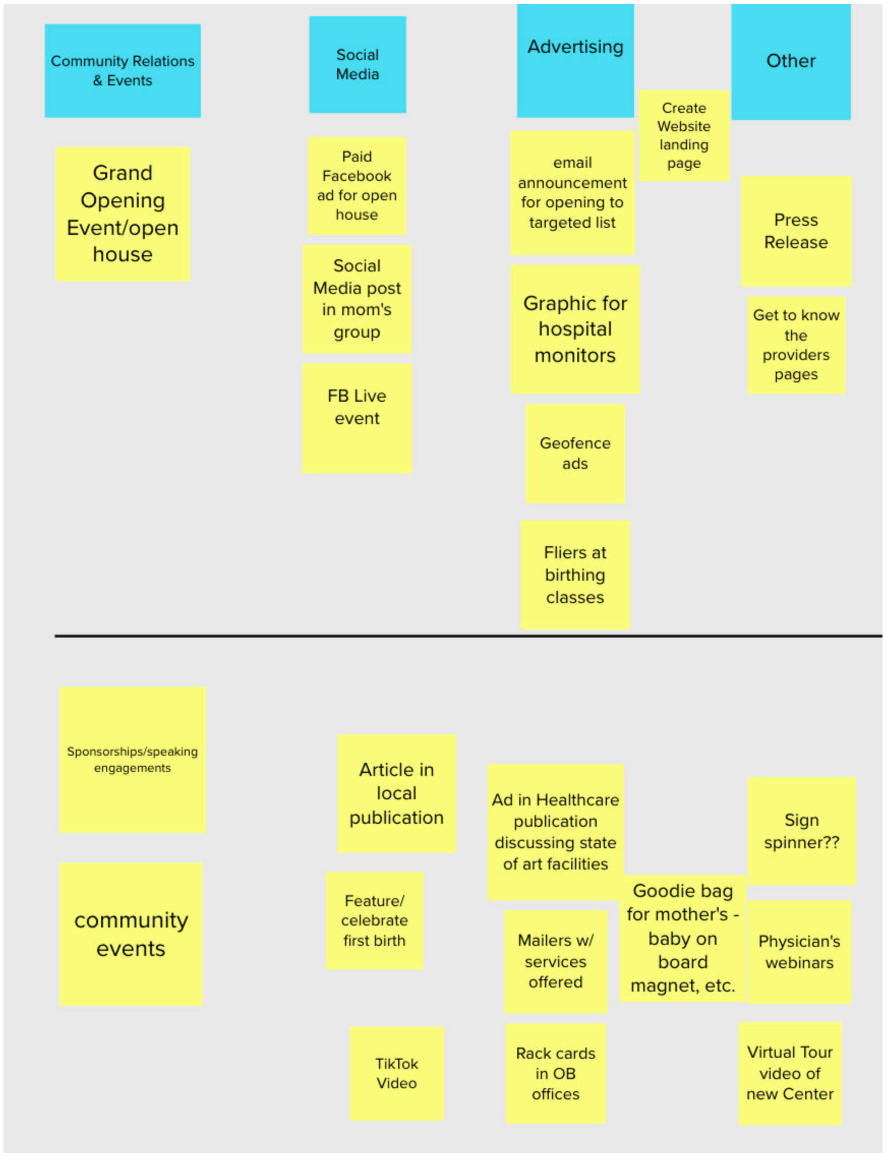
To get to this shared understanding, it should happen in real time during the Collaborative Planning Workshop. After everyone has come up with a ton of ideas, now it's time to figure out which ones are believed to have the biggest impact on the Guidepoint, which is what the team is striving to achieve.

One way to force these decisions is by giving a false timeline. The facilitator can say, "If the team only has two weeks, which items are the most important to tackle first?"

With a visualization tool such as Mural or Miro, a virtual team can draw a line and move around the ideas, with the agreed-upon most important ones falling above the line and the ones that can wait to go below the line.

With today's easy and instantaneous access to campaign performance data, agile marketing allows marketers to become real business leaders — taking what works and scaling up, looking for underperforming assets and stopping.

Example: Minimally viable launch from a healthcare company



Time box this activity so people don't overthink it. The team can go back later and validate the effort and viability of the ideas, but they shouldn't strive to get it perfect in a collaborative session. Here are some steps that you can follow:

Step 1: Organization

- Spend 5 minutes organizing the ideas.
- Add headers to the ideas such as "Social Media" or "Advertising."
- Move the sticky notes to the appropriate headers.
- Delete any duplicates.

Step 2: Prioritization

- Spend 10-15 minutes prioritizing the ideas in each category by discussing them as a group and how well they align with the Guidepoint.
- The most impactful idea should go to the top of the column right below the header, then follow down the line in order of priority.

Step 3: Minimally viable launch

- In this step, the team will determine the minimally viable launch. This is the time to discuss a shorter timeline or a more refined goal or target market to narrow down the ideas.
- Time box this step to no more than 15 minutes.

By working as an entire delivery team with your business stakeholders, you'll quickly gain alignment and be well on your way with agile marketing by thinking about minimally viable rather than a Big Bang approach. ■

Stop #1: Collaborative Planning Workshop

Chapter 4: Creating a Blueprint

The Blueprint gets created as a follow-up to the Collaborative Planning Workshop. The Marketing Owner is responsible for its creation and uses it as a frequent conversation tool with leaders and stakeholders to adhere to alignment on the teams' priorities. Like most things agile, the Blueprint isn't written in stone but can be modified and adjusted as new business priorities bubble up, as long as everyone is on board and other priorities get dropped.

A big reason that we created the Blueprint in the Agile Marketing Navigator is to empower the Marketing Owner with an easy output that everyone agreed to that's lightweight enough to change. It also prevents managers from getting too heavily involved in the teams' backlog and wanting to control every deliverable. As long as they know what the big categories are and when they're happening, that typically satisfies curious stakeholders while giving the team space to adjust tactics as they see fit.

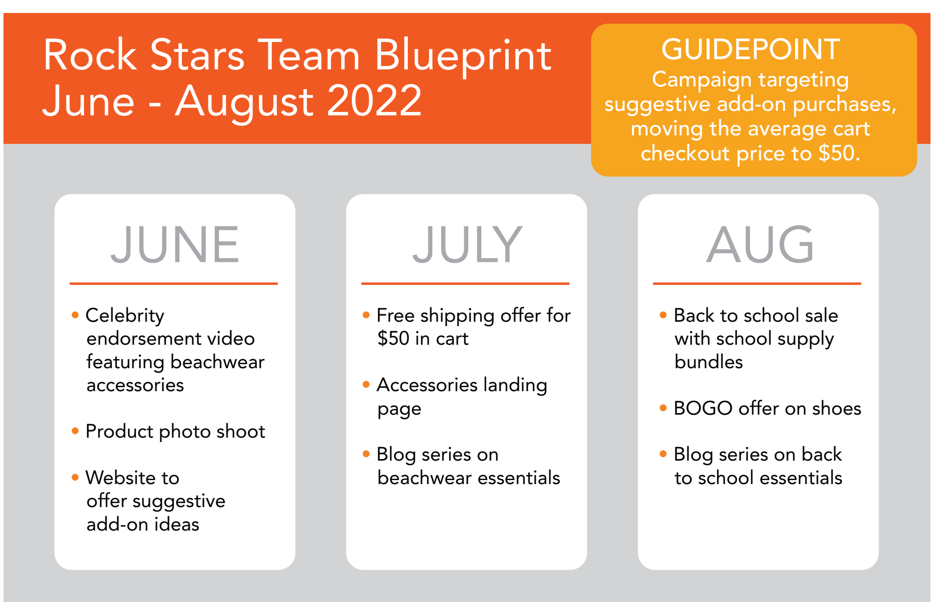
The Blueprint itself should be created by each team. If there's a Marketing Owner that oversees several teams, a consolidated version can be created, but each team should have an easy view of the work that's expected of them.

It's also important to put in the Guidepoint that everyone agreed they're working towards. This way, everyone can easily see that the work is (or isn't) related to where the team is directionally headed.

We suggest that the Guidepoint be no more than a three-month timespan, as priorities change too quickly in today's fast-paced world, and we want to plan at the last responsible moment with agile marketing.

Within every agile marketing cycle, the team and stakeholders meet to share and get feedback on work, which we call the Team Showcase (more on that to come in a future article). The Marketing Owner should bring the team's Blueprint at that time to see if the work coming up is still the highest priority for the team, and if not, align on any changes.

Agile marketing is all about flexible planning and frequent communication and collaboration. The Blueprint is just another tool in your toolbox to be able to do both of those things effectively.

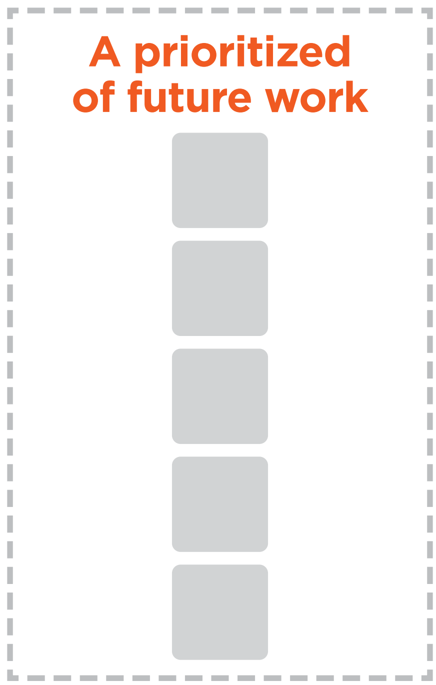


Stop #1: Launch Cycle

Chapter 5: Building a Marketing Backlog

The second stop on your agile marketing journey is the Launch Cycle. The Launch Cycle is a repeatable cadence for delivering valuable marketing experiences early and often. Within the Launch Cycle, there are five key components — Marketing Backlog, Cycle Planning, Daily Huddle, Team Showcase and Team Improvement. If you're familiar with the Scrum framework, there are a lot of similarities here — with a few different nuances to make it more applicable to marketers.

Building and managing an effective Marketing Backlog



Now, let's dive into the Marketing Backlog and some tips and tricks for marketers to be most effective.

The Marketing Backlog is an ordered list of prioritized work that the agile team will pull from to work on in their Launch Cycle. The backlog is emergent, not static, and changes as new information is learned.

This part of the framework is incredibly important and can have a major impact on how marketers work. First of all, there's one shared place where all work lives. This avoids work happening "behind the scenes" that no one knows about.

In fact, one client that I worked with took all of the work that was already assigned to stakeholders, put it in a single backlog and realized that it would take five years to deliver! It's with this level of transparency that teams and leaders can begin to visualize everything the team is doing and start to really understand what's important and what may just be someone's pet project.

There are many tools for managing your marketing backlog and they all have their pros and cons. The main thing to watch out for is ensuring that everyone on the team, as well as stakeholders, have access. We want to build a transparent system.

If you've started with the Collaborative Planning Workshop, you've already begun to build out the Marketing Backlog. The items in your Minimally Viable Launch will go near the top, and other items will fall below. Work is never guaranteed until the team starts working on it, and even then sound business reasons could cause them to pivot, although that shouldn't be the norm.

Prioritizing the backlog is one of the key responsibilities of the Marketing Owner. While they don't do this in a vacuum and conversations with stakeholders are imperative, this role has the ultimate authority to decide what order the team will work on and which items won't be considered (there are always way more good ideas than time).

The role of the Marketing Owner

The Marketing Owner needs to really understand the business value that each idea brings. Each marketing backlog should be thought of in terms of:

- Level of effort it will take the team to complete (let's face it — all things aren't created equal. Building a Tesla may take longer than a base model Honda, so think through marketing ideas as well).
- What value does it bring to customers? Joy? Satisfaction? Solves a problem? Addresses a cause?
- What will the business gain from this idea, and how does it tie to business goals, KPIs and revenue?

> **Work should never be directly assigned to a team member in agile marketing. It should be submitted to the backlog or discussed with the marketing owner as it needs to be visible and prioritized among everything else.**

Stakeholders, customers and team members should all be thinking about new ideas all of the time and everyone is invited to submit ideas to the backlog. However, it's at the Marketing Owner's discretion to decide which ideas will be worked on by the team and when.

Work should never be directly assigned to a team member in agile marketing. It should be submitted to the backlog or discussed with the marketing owner as it needs to be visible and prioritized among everything else. In agile marketing, backlog items should be used to test and learn and are thought of as micro-experiments, rather than large campaign blasts.

While a backlog item may be for a post on Facebook, the team should be thinking in terms of testing elements, such as content. If the content is successful, similar content pieces would be on the backlog. However, if the content doesn't perform well, the team would want to think of new backlog items with different content. ■

Stop #1: Launch Cycle

Chapter 6: Cycle Planning

During Cycle Planning, the team collaborates and plans for the work they intend to launch during a 5- or 10-day cycle. The goal is for everyone on the team to commit to what work they plan to launch and to discuss how they're going to work together to achieve that goal. The team synchronizes timing around their work and understands everything involved to deliver customer value in this launch.

To prepare for Cycle Planning, the Marketing Backlog should be ready for the team. Things to look for here are:

- Is the work in priority order?
- Is the work sized by effort?
- Do we understand any dependencies?
- Do we know what success looks like for each backlog item?
- How will we test, learn and measure our results?

> "The team doing the work attends Cycle Planning. This may include part-time team members, or Supporting Cast — people that have work in the upcoming Cycle.

The Marketing Owner should come to Cycle Planning with a Cycle Goal in mind that ladders up to the Guidepoint. This is meant to give the team guidance on what a good outcome of the cycle will look like, but not specific tasks that they will complete.

A Cycle goal may read something like this:

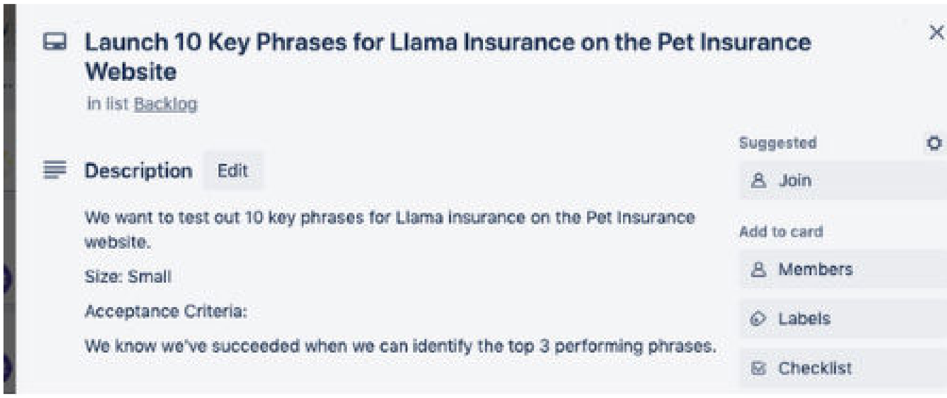
Cycle Goal

Test 10 key phrases for Llama insurance to see which ones perform best

The above shares what the Marketing Owner hopes the team accomplishes, but the team decides what work they can do in the cycle to get there and may also have other work as well.

The team doing the work attends Cycle Planning. This may include part-time team members, or Supporting Cast — people that have work in the upcoming Cycle. Stakeholders and Practice Leads shouldn't attend unless they are contributing to the work.

The team is self-organizing in Cycle Planning. The team decides which marketing backlog items they can tackle during the cycle, and how they will accomplish the work by breaking out tasks.

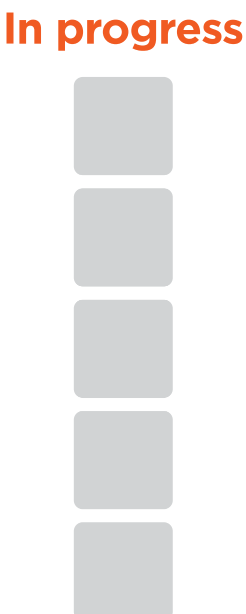


At the end of Cycle Planning, all team members should know what work the team has committed to and how they all plan to approach getting it done. The Cycle Planning eliminates siloed planning and people only focusing on their tasks and brings to light collective team ownership.

Stop #1: Launch Cycle

Chapter 7: The Daily Huddle

The purpose of the Daily Huddle is to focus on the work in progress and how the team is doing towards completing the work that they planned during Cycle Planning. The Daily Huddle is meant to eliminate one-off conversations and to build up teamwork and shared ownership and accountability.



People often ask, "Why does this have to be daily? What about two or three times a week?" While our framework strives for being pragmatic, and you can certainly figure out what works best based on your unique situation, the teams that I've worked with that actually connect daily have a lot fewer one-off meetings and tend to have better communication, so that the small time investment tends to actually save time in the long run.

> **"The Daily Huddle should be attended by the Team and any Supporting Cast members that have active work in the current cycle.**

The Daily Huddle should be attended by the Team and any Supporting Cast members that have active work in the current cycle. Practice Leads and Stakeholders should refrain from attending unless invited by the team. Just like we want our teenagers to learn how to be adults by letting them figure out their own problems before asking mom and dad, this works similarly. We want the team to first have an opportunity to identify and resolve problems on their own.

There are two main ways I've seen teams run a Daily Huddle (but new, creative techniques are always welcome). The first is a person-by-person approach where every team member talks about what they're working on. The second is a work item approach, where the team talks only about the work items in progress and how they're doing at getting them done.

Questions to ask

With the person-by-person approach, the traditional three questions that Scrum used to have (they're no longer part of the official Scrum Guide) were:

- *What did you work on yesterday?*
- *What are you working on today?*
- *What are your blockers?*

These questions are fine to use, but a lot of marketers find focusing on yesterday to be a bit backward and like to just narrow it down to:

- *What am I contributing today?*
- *What's getting in my way?*

By saying "contributing" this adds a powerful statement and gets team members to answer something valuable because no one wants to be that person that's not contributing.

A great Daily Huddle shouldn't feel like a status report. There shouldn't be a single person on the team that everyone is looking at as updates are given. If you notice that behavior, it's a sign that the team is still more concerned about status updates when they should be more concerned that as a team they're working together to get all work done, not just an individual's piece.

A healthy Daily Huddle is when team members are offering to jump in and help each other out, even if it's not their typical role at the company. When the focus is on accomplishing work as a team, you know you're succeeding.

Stop #1: Launch Cycle

Chapter 8: The Team Showcase

This is an event where the team showcases work done in the Launch Cycle and gets feedback from stakeholders. Additionally, the team shares any relevant performance metrics in order to learn through experiments and data rather than opinions and conventions. The group reviews the Blueprint to see if priorities for future work have changed. If feedback is valuable, the team re-prioritizes and adds or removes items from the Marketing Backlog (after the meeting).

The benefits of holding a Team Showcase are that it:

- Eliminates the need for "static" status reports.
- Shifts the focus to data and metrics rather than opinions and conventions.
- Gives Stakeholders a "real-time" opportunity to provide feedback.
- Empowers the team to share what they've been working on to all levels in the company.
- Allows for flexible planning and the ability to pivot what happens next based on feedback.
- Celebrates accomplishments!

> **"The Team Showcase is real-time, so status reports that once took hours to produce — obsolete before they hit the manager's inbox — get replaced with impactful live conversations.**

The Team Showcase should be held on a consistent day and time at the end of each Cycle, either every one or two weeks. The Product Owner invites any relevant Stakeholders based on what work is being showcased. For some companies, the audience may change from Cycle to Cycle, depending on the nature of the work.

Team members rotate sharing the work that has been done recently, giving everyone an opportunity to be proud of their accomplishments. Unlike Scrum's Sprint Review, the work showcased may or may not have been fully completed during the Cycle. Instead, it's live in the market, and there are learnings based on data and analytics that can be discussed.

An opportunity for constructive feedback

Stakeholders offer constructive feedback on any work showcased. The goal isn't to hear comments like "I want the image to be blue," but rather, "Have we thought about other uses for this ad? Maybe we can test how it would perform on Instagram?" The Marketing Owner has the "power" to decide what to do with the feedback and how it may alter work.

The Team Showcase is real-time, so status reports that once took hours to produce — obsolete before they hit the manager's inbox — get replaced with impactful live conversations.

Marketers have access to plenty of data, but too often they've moved on to the next project or campaign before anything is done with that data. The Team Showcase is a wonderful opportunity to share data regularly with the team and the Stakeholders: plans should change based on learning by doing.

Showcasing work and how it's performing is a great way to get team members to share their work with stakeholders and leaders. However, not all results are favorable, and it can be scary to share negative results. It's important for the team to feel psychologically safe to share the good, bad and ugly. Agile is all about fast failures and quick pivots, but it takes some time to get to a place where most people are comfortable being vulnerable.

Leaders should underline the importance of what was learned, not what went wrong. This allows the team to be open and honest about what's really going on. Pivoting is a natural part of an agile marketing team, as well as putting more emphasis on what's high-performing. This "nail it and scale it" approach will help turn a team from a static one that simply delivers into an innovative one that is really agile. ■

Stop #1: Launch Cycle

Chapter 9: Team Improvement

Team Improvement is a collaborative session for team members to look at continuous improvement. The goal is to find a small action item that the team can implement in the coming cycle to improve how they work together. Reflecting back on their most recent Launch Cycle helps the team learn from actual events.

You may have heard this called the Retrospective in Scrum, and if you're already familiar with or practicing retros, keep it up. We're not changing the meaning of something that we already know works amazingly well, but we've given the name a slight facelift — so let me tell you how that story unfolded.

"High-performing teams always reflect back on how they can improve, and teams that feel empowered really enjoy this session because they feel a sense of ownership and accomplishment.

After coaching many teams over nearly a decade, I noticed the missing piece that wasn't happening (although it's supposed to happen by definition), which is actually improving how the team works together. Over time, these meetings often turned into b*tch sessions where I'd hear things like, "We don't have the right martech stack to do our jobs," but instead of coming up with solutions and solving problems, it was restating the same complaint week after week. And that felt counterproductive.

So even though Team Improvement and Retrospective are synonymous, the emphasis on the words "Team Improvement" was deliberate, to ensure that the focus remained on becoming a continuously improving team, not just retro-ing what's going well and what's not, over and over again.

Team Improvement benefits

Agile is all about continuous improvement. You're never done with agile marketing because that would imply that learning the basics is good enough. High-performing teams always reflect back on how they can improve, and teams that feel empowered really enjoy this session because they feel a sense of ownership and accomplishment.

A Team Improvement session should be conducted by the team, for the team. This is where Practice Leads and Stakeholders need to get out of the way and give the team space to solve its own problems without interference. When I've seen a boss jump in and try to solve a problem for the team, it shuts down their power and they'll naturally defer to the boss. A team feels automatically more psychologically safe when among peers, so avoid any power dynamics here if possible.

The benefits of holding a Team Improvement session include:

- Continuous improvement.
- Building trust and relationships.
- Fostering a safe space to speak up.
- Empowering the team to solve their own problems.

All of this leads to a higher-performing team.

Tips for facilitation

If you have an Agile Champion role on your team, that person should be the facilitator. If that role is absent, create a rotating facilitator responsibility. The facilitator needs to keep this fun and engaging, while also remaining a neutral party.

A website such as Tasty Cupcakes can spark some fun ideas for this session to keep it interesting, especially in a virtual setting. There are also several automated tools available — here's a comprehensive list to check them out.

While it's easy to fall into the trap of the same format for Team Improvement sessions each cycle, mix it up. Definitely have fun with it! The Sailboat is a classic agile theme. There are many resources online showing how to build a Sailboat template: Here's one example.

First, the team centers around a project or initiative. Next, a timebox is set for the team to fill out the virtual stickies in each category. Somewhere between five and 10 minutes is good, depending on the size and complexity of your team.

The categories that the team will reflect on are:

- Wind in our sails — what's moving us forward?
- Beacons on the horizon — what milestones, goals are upcoming?
- Anchors holding us back — what's keeping us from making progress?
- Reefs or rocks we see ahead — What do we need to navigate around?

After everyone's had a chance to silently submit sticky notes (you can even send out the template ahead of time if you have people in other time zones), a timeboxed discussion takes place and everyone should have an opportunity to share their thoughts.

The final takeaway, and the biggie, is: What one actionable item are we going to commit to that will help us as a team drive forward? This is the Team Improvement piece, and really the golden nugget of it all. ■

Along the Route: 6 Key Practices for Agile Marketers

Chapter 10: Customer Stories

In recent chapters, we covered the Collaborative Planning Workshop and the Launch Cycle. Now we're going to dive into our third stop on your agile marketing journey — 6 Key Practices.

The Agile Marketing Navigator is intended to be a flexible framework, so these 6 Key Practices are suggestions, not requirements. You can mix and match them. You can do all six, or just two or three. You can combine them with some of your own practices. There are a lot of valuable practices out there, but the reason we chose to hone in on these six is that our team of marketing executives and agile coaches all saw real proven benefits from them.

Today we'll talk about the first practice — Customer Stories. This is a practice I wrote about in a 2021 article, "Writing customer stories to improve team collaboration," so you can see I'm a pretty big fan of them. But not always, and not for every team.

What are Customer Stories?

A Customer Story gives everyone a more well-rounded perspective on the work the team is setting out to do, and is inclusive of all work required to create value for the customer.

Customer Stories are derived from user stories, a longtime popular concept among Scrum teams in software development. They are the late 1990s brainchild of Dr. Alistair Cockburn, stemming from a need to bring together business people and tech people to have a conversation. The idea was that handing over lengthy requirements documents from "the business" to "the developers" was inefficient and a lot got lost in translation.

> **"While user stories work well in software development, the focus is more technical on how a user of a website or software system uses a feature.**

In 2001, Ron Jeffrey put a new spin on them with the 3C's — Card, Conversation, Confirmation. In 2004, Mike Cohn popularized the practice within agile software development in his book "User Stories Applied For Agile Software Development."

While user stories work well in software development, the focus is more technical on how a user of a website or software system uses a feature. A customer story in marketing is about the target customer we're trying to reach and what benefit that customer will receive from the marketing tactic we deliver.

Here are a few examples of customer stories:

- "As a realtor, I want a landing page where prospects can go so that I can build up my sales pipeline."
- "As a healthcare provider, I want to get a weekly email update on vaccination rates in my community so that I am better prepared for a crisis."
- "As a mom of two, I want a buy-one-get-one-free offer on back-to-school shoes so that I can save money."
- "As a new homeowner, I want to receive a brochure on where to find a qualified pediatrician near me so that my kids are well cared for."

One of the biggest challenges I've seen in coaching marketers rather than software teams on how to write customer stories is the level of thinking. Software teams have an easy time coming up with a story about a small update, whereas marketers need to think in much broader terms. Instead of this being a battle to fight, exploit the way that marketers ideate naturally.

While my examples above are extremely specific and cover a single deliverable, such as a landing page or an email, it's okay to start with a general story such as:

- "As a realtor, I want to build up my sales pipeline so that I can grow my business."

From there, a lot of teams like to ideate what tactics align with that story such as building a landing page, launching an email campaign, etc. Either of these approaches works. One is the more traditional way, and the other is the way I've learned to be agile about teaching this to marketers.

The goal, of course, is a shared understanding of the work.

Which marketing teams should use Customer Stories?

Any teams that deliver marketing to customers can use Customer Stories. They are a great way to have a conversation as a team and to look at work differently. It also helps if you're accustomed to siloed work and passing work from person to person. The Customer Story gets everyone on the same page.

So, when would you not use them? If the team thinks they are already performing well and doesn't want to spend the time on them. However, I've found that a little bit more time upfront leads to better teamwork and more customer-centric delivery of valuable marketing content. ■

Chapter 11: Story Points

Story Points is the second of our 6 Key Practices and a practice I wrote about in a 2020 article, "Agile estimation techniques help marketers manage workload."

What are Story Points?

Story Points is an estimation technique borrowed from our software friends. The idea is that a quick, non-precise point system can help a team understand how much work they can accomplish in a given cycle. This helps resolve two main problems that marketers face — too much work and lack of trust by stakeholders that marketing will deliver.

> **"The point system comes from the modified Fibonacci sequence, a mathematical string of numbers that double in value on the low end and gets less precise as the numbers get higher.**

The point system comes from the modified Fibonacci sequence, a mathematical string of numbers that double in value on the low end and gets less precise as the numbers get higher. In both software planning and agile marketing, the exponential growth in the numbers reflects that more complex work has more critical unknowns. While the full sequence goes on a scale up to 100, we recommend simplifying the scale to avoid unnecessary complexity. Here's our suggested sequence:

1, 2, 3, 5, 8, 13

The point numbers are there to compare one work item type to another, allowing team members to have a conversation about strong differences.

For example, you may be talking about a celebrity-endorsed Instagram promotion. A few team members may think it's really easy and call it a "2". Then, you may have another team member that says, "Hang on, getting a celebrity endorsement is a huge effort. When we tried to book Reese Witherspoon last year it took months of going back and forth in contract negotiations. Do we have a contract and just need to create the post, or does the work include booking the celebrity?"

As you can see, the effort required for creating the content and booking a celebrity would be a lot more than just the effort of creating the content. By having these early discussions, the team can make sure they have a shared understanding of the work and avoid either under- or over-planning.

Who can benefit from Story Point estimation?

Teams that are newly formed can really benefit from this technique. It's a great way to get a shared understanding of delivering customer value as a whole, not just one marketer's piece of the puzzle.

Story Point estimation can really help teams that are overloaded (isn't that just about every marketer these days?). This technique applies data to how much work a team can take on at a sustainable pace, giving the team some well-deserved breathing room and stakeholders a higher level of confidence as to when their requests will be completed.

If your team is already proficient at quick delivery, isn't overwhelmed, and has a good rapport with stakeholders about when work will get done, you probably don't need this practice. Our 6 Key Practices are optional, so pick and choose the ones you think will give you the most bang for your buck.

Why Story Points are easier to implement on marketing teams

For decades, software teams have been under the gun to estimate and have been reprimanded when an estimate proved false and the work took longer to complete than expected. Stakeholders wanted less of an "estimate" and more of an "exact". So when Story Point estimation started to become the norm with software teams, they had a lot of estimation baggage to deal with, and converting to a new system that's quick and imprecise caused a lot of uneasiness.

However, in marketing, we're mostly working with a clean slate. Marketers rarely estimate work, so there aren't a lot of bad habits to break — only benefits to be gained.

How to conduct Story Point Estimation

To get started, you'll be working off of your Marketing Backlog. Once this is in priority order, the team meets to start estimating. It may help to come prepared with the different types of work your team typically does, such as a blog, social post, landing page, etc. All team members that deliver work (including agency partners if they're a big part of your delivery) should attend.

> **"After a team gets used to working together, they may establish their own scale — then estimation is really quick and easy.**

The team will begin by establishing a baseline. I find it works well to look at the easiest work item type first, such as a single social post and call it a "1." Next, the team will compare the item at the top of the backlog to the social post. Everyone on the team should vote at the same time to see if you have some initial consensus.

Now, let's say that your next backlog item is a blog post. Everyone would be looking at the numeric scale and comparing the effort for completing the blog post to the effort of completing the social post. A quick and easy way to do this with a remote team is to have everyone vote using the chat feature in Zoom, Teams or wherever you're meeting.

Let's say the team votes: 2, 2, 3, 3, 8

Since the twos and threes are pretty close, but the eight is an outlier, you'd want to ask the person who voted eight to share why they think it's a bigger effort. This person may then be convinced that they voted too high, or the team may agree they didn't factor in something and they should have voted higher. They may do a re-vote, or simply align on a number. This is meant to be no more than a five-minute discussion, not a lengthy and heated debate.

After a team gets used to working together, they may establish their own scale — then estimation is really quick and easy. They may always call blog posts a three and unless the work is vastly different from the norm, they don't need to re-vote over and over again.

Story Point estimation is meant to be fast, provide conversation among team members and establish how much work a team can do before burnout. If you haven't done it before, give it a try. It just might solve some agile marketing challenges you've been experiencing. ■

Along the Route: 6 Key Practices for Agile Marketers

Chapter 12: Work in Progress Limits

Let's face it, marketers have a big problem — they're overloaded with too much work. A big consequence of too much work happening at once is getting a lot of work started, but nothing really finished.

In agile marketing, a primary goal is to deliver work rapidly so we can get feedback to inform future work. However, when marketers are spinning in a sea of content creation soup or email overload, work is often getting caught up somewhere in the internal workflow and not getting delivered as quickly as it should.

Understand the team's current work in progress

Work in Progress (WIP) limits derive from the popular workflow framework Kanban and it's a practice that helps teams understand optimal workflow.

Let's say that you're a content marketing team and you're visualizing your work in an agile tool such as Workfront or JIRA. The team notices that they could be more efficient at getting work from "in progress" to "done" and that limiting how much work is in progress at any given time may help them be a better-performing team.

To get started, the team should take a few weeks to track how much work they currently have in practice each day, coming up with an average. Here's a simple way to calculate the team's current WIP by jotting down what's on the team's board:

Day	Number of work items in progress
1	8
2	10
3	7
4	9
5	12
6	9
7	13
8	12
9	10
10	11
11	12
12	13
13	8
14	9
Average WIP	**10**

> **To calculate the team's current work in progress, add up the total in column 2 and divide by 14, which gives an average of 10. This means that the team averages 10 items in progress at any one time.**

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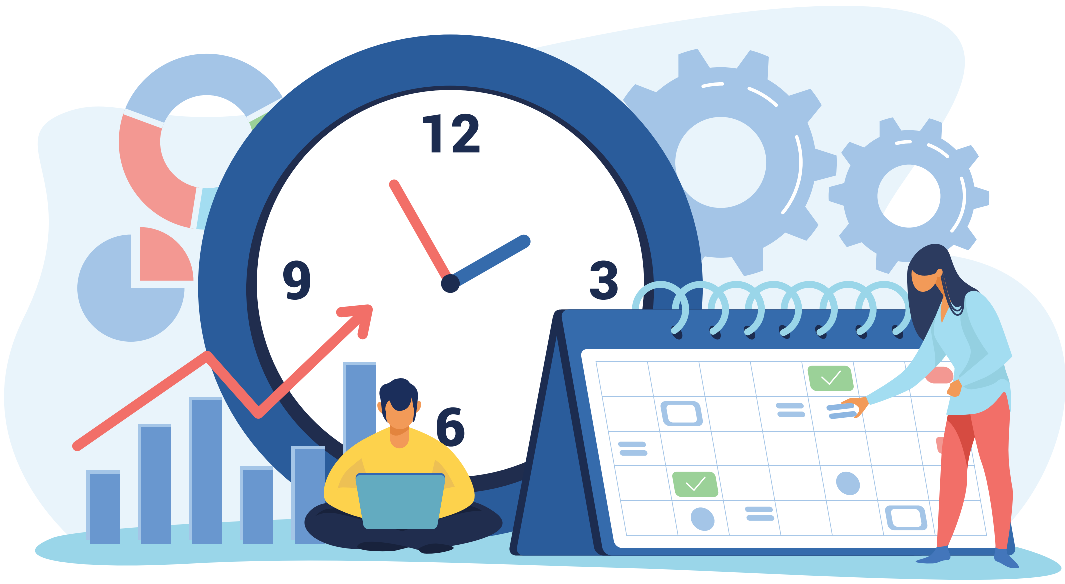

Experiment with WIP Limits

Now that the team understands their starting place, they can experiment by setting different WIP limits. Since they know that with 10 work items in progress at any given time they are not at optimal efficiency, they should agree to set a lower limit, such as eight, and experiment over the next few weeks by not allowing more than eight pieces of content to be in progress at once.

After that two-week period, the team should discuss how it went. Did they see any improvements in how much work got done? If yes, they may have found an optimal number. If they believe it is still too high, they can try another cycle with a lower number.

It may take several experiments to understand the team's WIP limit, and that number may change over time. The main point is that the team is empowered to set this themselves and to work together to improve their efficiency.

This isn't a beginner's practice, so I recommend only trying this with teams that have been working in agile marketing together for six months or longer and have mastered the basics. This practice is more about refining and optimizing a relatively experienced agile marketing team to improve efficiency. ■

Along the Route: 6 Key Practices for Agile Marketers

Chapter 13: Cycle Time

The fourth of our 6 Key Practices: Cycle Time. If your team is plagued by work taking forever to actually get to customers, you may have inefficiencies in the way you work. For example, maybe your team is really great at getting social posts up quickly, but when it comes to email, there's a huge lag in the delivery time.

Cycle Time measurement is all about measuring how a specific work item type, such as email, takes from start to finish — uncovering inefficiencies along the way. The team is then collectively accountable for discussing ways to improve the Cycle Time. In a truly agile culture, leaders would allow the team to make these changes. In a company that's more traditional, it may not be so simple, but at least gaining awareness around the current state can actually start to move mountains.

Is work taking too long to get to customers?

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Are leaders aware of what's holding the team back?

I've been at a lot of companies where leaders are asking why something can't be delivered sooner — so the team works overtime to make miracles happen. Then it happens again. And again. The cycle is vicious and hard to break, but no one is really solving the root problem.

Too many times, people are trapped by tunnel vision and only see their own piece in the delivery of work, not the whole picture.

I was working with a company's CMO, and with him and other leaders in the room, we uncovered exactly why it was taking so long for emails to be delivered. We discussed every step of the process, from start to finish, and looked at where things were getting stuck.

We found that a lot of sign-offs were taking several days, including multiple rounds of reviews that were unnecessary. After making that discovery, emails went from taking more than a month to get to customers to being delivered in a week.

- Understand the key audience
- Segment the list from a database
- Design the email
- Design approval
- Creative review
- Revision #1
- Creative edits
- Write copy
- Copy review
- Final draft
- Legal review
- Send to martech team for coding
- Deployment

Next, ask the team to list how many days on average each step of the process takes:

Understand key audience	3
Segment the list from a database	1
Design	3
Design approval	3
Creative review	2
Revision #1	2
Creative edits	1
Write copy	2
Copy review	2
Final draft	1
Legal review	5
Send to MarTech team for coding	5
Deployment	5
Cycle Days (on average)	**35**

While it may not be exact, they can quickly see that it takes about 35 days on average to deliver an email. This may make a few people gasp! They probably didn't realize just how clunky this process was until they could visualize every step of the way and realize the inefficiencies.

Now that they've identified Cycle Time, the real magic happens when the team can discuss what's slowing them down. A few examples here are:

- Approvals take too long.
- Copy and design reviews happening sequentially.
- Another team needed to code and deploy the emails.

After defining the issues, the next step is to brainstorm solutions. A few ideas could be:

- Can we agree that approvals happen within 24 hours?
- Can copy and design work together from the beginning and in tandem?
- Can our legal partners agree to come to a huddle once a week and sign off on requests?
- Can we agree on what types of content actually need legal review?
- Can we train someone on our team to code/deploy emails?

Understanding Cycle Time and building transparency around it are key steps to making your team run more efficiently and succeeding with agile marketing. ■

Along the Route: 6 Key Practices for Agile Marketers

Chapter 14: Waste Removal

If you've ever looked inside your closet only to realize that you have a lot of clothes that you haven't worn in a decade, you've got waste. You're taking up space with something that's no longer providing value.

Well, the same goes with the way that we work. Oftentimes we're only doing something because it's the way we've always worked. However, that legacy process may be preventing us from being more agile (just like when we have to sift through 100 sweaters to find the one we're looking to wear).

In agile marketing, waste removal is about cleaning out our work closets and making room for the practices that truly bring agility and purpose to how we do marketing.

When does Waste Removal happen?

Waste removal can happen by anyone on the team at any point in time and should be on everyone's minds continuously. Agile is all about continuous, collaborative improvement, and this is one way to demonstrate that.

A specific time when Waste Removal can naturally occur is after measuring Cycle Time. During Cycle Time measurements, the team identifies where slowdowns in the workflow are happening and looks to improve the current process. Actually removing the waste in the process is the next step.

"During Cycle Time measurements, the team identifies where slowdowns in the workflow are happening and looks to improve the current process. Actually removing the waste in the process is the next step.

Common places where waste occurs

For many marketing teams, the majority of waste happens in the form of reviews or approvals. There are also unnecessary meetings, work happening outside of the team, or siloed/fractured processes.

Here are some common waste examples:

- Endless rounds of creative reviews.
- Legal approval on every item.
- Managers needing to approve work, but being slow to respond.
- Meetings to plan meetings.
- Dependencies on people outside of the team, such as developers or agencies.
- Overly complex workflows.

Do any of these waste examples sound familiar to you?

Empowering teams to find solutions

While it's easy and comfortable to say, "That's the process," or "It's not my job to fix this," agile marketing is all about team ownership, accountability and striving towards solutions to complex problems.

If you're a leader, how do you encourage your team to take on this type of behavior? It usually starts with giving them permission and space to creatively come up with solutions for new ways of working. It's taking a step back and letting the team come to you with recommendations rather than the other way around.

> **"If the team isn't used to solutioning, you as a leader can help facilitate a brainstorming session, as a leader — but don't give them the answers.**

Let's run with the example of endless rounds of creative reviews. The team has identified that it's a problem. If the team isn't used to solutioning, you as a leader can help facilitate a brainstorming session, as a leader — but don't give them the answers. The magic happens when the team comes to leaders with ideas.

Now that the team is in a brainstorming session, have them spend a few minutes identifying why this is a problem. Listen intently as their leader.

They may discover a few things such as:

- The team is frustrated and feeling like they aren't doing a good job.
- Team members are looking for new jobs.
- Work is never getting done while waiting for perfection.

Next, they'll ideate on ways to solve the problem. Take five or 10 minutes of silent ideation and have the team write sticky notes or something comparable with an online tool.

Their ideas may look something like this:

- Limit creative reviews to 2 rounds.
- Provide guidance to leaders on objective feedback rather than just personal opinion.
- Get clearly defined outcomes from stakeholders upfront.
- Hold review working sessions to speed up turnaround time.

With these tips in mind, your team will be able to successfully navigate agile marketing and remove wasteful ways of working that aren't adding value. ■

Along the Route: 6 Key Practices for Agile Marketers

Chapter 15: Partnering

Years ago in software development, a practice was started called "pair programming." This allowed two software developers to work together on the same code with the notion that two heads are better than one. Pair programming helps software developers think more innovatively and quickly solve complex problems.

We created the practice of Partnering in a similar way, but in marketing, it's more about overlapping work. Rather than having a piece of creative work fully developed by a copywriter and then put into a design, partnering allows shared understanding of the work and creative thinking from both roles, avoiding silos.

Getting started with partnering

Partnering can feel really strange, especially if you work at an organization that's used to very specialized roles. The best time to get started in partnering is at the beginning of the work. If you're using this framework and are working in defined cycles, as soon as the customer story is pulled into the cycle during Cycle Planning and the team talks about the work, partnering can happen.

Partnering can happen with any two or even three roles, but the most common ones are between writers and designers.

> "Partnering can happen with any two or even three roles, but the most common ones are between writers and designers.

Here's a story to illustrate how partnering may look from start to finish:

The team has just finished Cycle Planning and one of the stories due this cycle is for a landing page about a new training class. Several team members are involved in getting this landing page done, including a writer, a photographer, a designer and a web programmer. The team has decided on what photos the photographer will shoot and the programmer will start coding towards the end of the cycle, so they have a solid plan. Instead of the writer and designer working in turn as an assembly line, they'll partner.

The writer (let's call her Suzy) and the designer (Will) decide to meet together after the team has planned its work to discuss their partnering.

Suzy says to Will, "What do you need from me to start mocking up a design?" Will says, "If you can give me the headers and approximate word count, I can fill in with fake text to test the layout." Suzy agrees she can get the headers to him today, he'll mock up the design and tomorrow they'll review it together. After they see it, Suzy will continue writing copy and flushing out the design.

Benefits of Partnering

In the above example, not only did collaboration help them align on the end result, but it also helped with innovation, working iteratively (which is what agile is all about) and being able to move much faster than waiting for the completion of one item and baton handing it off to the next person.

Think about your company. Are there roles that could begin partnering today to streamline how you work? I'll bet you can come up with a few examples of your own. ■

Along the Route: 6 Agile Marketing Roles

Chapter 16: Teams

The navigator identifies six agile marketing roles, whereas Scrum has only three named roles. We're not trying to overcomplicate roles, but we've expanded our definition of agile roles to go beyond just the team. The roles that support the team must also be versed in agile marketing and know their responsibilities. In my experience with Scrum, we often forget about everyone outside the team — and those people think that agile is only for the team.

We'll deep dive into each of these roles and why they are significant. Of course, a framework only scrapes the surface of these roles and isn't intended to be a comprehensive job description. That's where your organization and its uniqueness fit into the mix, but what our framework does provide is a baseline of what's expected from these roles in agile marketing.

Role #1: The Team

Today we're going to dive into our first role, the team itself. If you've worked on an agile team in the past, the role of a team member doesn't change much despite the framework used. However, we'll refresh you on what makes up a good agile team versus one that may not be set up for success.

Who should (and shouldn't) be on an agile marketing team?

When getting started with agile marketing, a good team formation is going to be key to your success. I've seen a lot of variations of what people call an agile "team" so let's begin with who should and shouldn't be on your team.

Should:

- People who are getting their hands dirty and are "doers" of the work — such as content writers, SEO specialists, graphic designers, software developers, analytics, etc.

Shouldn't:

- People who are managing the work of others, but not actually doing it themselves. We have another role for them called "Practice Leads" which will get into in the coming weeks.

It's really common for everyone to want to be on the agile team, however, in order to gain the autonomy and ownership that are core tenets of agile marketing, the team needs to be made up of people who are actually getting the work done and who can collaborate with each other without someone telling them how to do it.

> **"While your job may be a graphic designer, if you can edit copy to move the work along, then you're helping the team, not just staying in your lane.**

Cross-functional teams vs. functional teams

In agile marketing, a cross-functional team is the ideal setup. This means that you have a mix of roles that can get a piece of work delivered from end-to-end without having to go to another team.

If you're building web landing pages, you'll probably need a designer, a writer and a developer to complete the work. The magic lies in having those roles working together, day-in and day-out, and understanding the entire piece of work from start to finish. That means being able to quickly deliver customer value.

A functional team, such as a team of designers, may gain some benefits from agility, but there are limitations. While some companies don't have full buy-in and need to start this way, they will find themselves unable to deliver value independently. A graphic design team may become really efficient and collaborative, but without the other roles, their work sits like inventory on a shelf.

Self-organizing marketers

Becoming self-organizing marketers is the goal with agile marketing. This means that the team serves more as consultants to stakeholders, having an active say in ideation about the marketing that needs to happen.
To become self-organizing, leaders must trust the team and allow them to fail. This can be really difficult in a traditionally-run culture, but once the team is freed and feels psychologically safe to give their opinions, more creative marketing happens.

T-shaped marketers

On an agile team, we look to create T-shaped marketers, meaning you have your core specialty but can help in a few other areas. While your job may be a graphic designer, if you can edit copy to move the work along, then you're helping the team, not just staying in your lane. An agile marketer knows and understands everything that has to happen to get work done, not just a single piece of the puzzle.

Working on an agile team is rewarding and empowering. You get to have a much larger part in the overall customer experience.

Along the Route: 6 Agile Marketing Roles

Chapter 17: Marketing Owner

Let's continue our deep dive into Roles by looking at the role of the Marketing Owner. This role is key to ensuring that business goals and priorities are clearly understood, and is the connective tissue between stakeholders that request work and the team that gets the work done.

If you're familiar with Scrum, you may have heard of a Product Owner. The Marketing Owner role is essentially the same, but the nuances of working in marketing versus managing a product may alter the role slightly.

Who fits into this role?

A common question I often get asked is who at a company is best suited to be the Marketing Owner? A common answer is a strategist because there may be a lot of similarities between the job they're already doing and the role on an agile marketing team. However, this can vary so much from company to company, so here are some good qualities to look for in filling this role:

- Has authority to make decisions for the team regarding priorities of work.
- Knowledgeable about the company and the market it serves.
- Works well both in the day-to-day tactical world as well as with a larger strategic vision.
- Is available to the team to answer questions about the work, but doesn't tell the team how to get their work done.

"Instead of a single person to filter all of the stakeholder requests through, every team member was exposed to them — so they were often working on conflicting priorities.

Why the Marketing Owner role is the backbone to the success of the team

While this role is considered an equal team member, and there isn't a hierarchy on an agile team, the role can make or break a team because the Marketing Owner is guiding the team directionally. Without that single person communicating the vision and priorities, the team is often pulled in a million different directions.

I once trained a large retailer that had been working in agile marketing for a while but had never set up a Marketing Owner role. After listening to me talk about it in class, they realized that this was the reason that their team was overloaded. Instead of a single person to filter all of the stakeholder requests through, every team member was exposed to them — so they were often working on conflicting priorities.

Prioritizing work is essential

The Marketing Owner's ability to prioritize work effectively is really important. Within the Navigator, we set out a pretty easy system for doing that. The Marketing Owner is responsible for writing the Guidepoint, which helps directionally navigate the team at a high level. The Blueprint is the tool the Marketing Owner creates to share quarterly work that the team is planning to deliver, but this is meant to be flexible and initiate conversations. From there a single-ordered backlog is owned by the Marketing Owner and it's this person's job to continually shuffle this as new priorities surface.

While we've given the Marketing Owner a lot of tools to make this job easier, this role really needs to be several steps ahead of the team and have a great working relationship with all of the team's key stakeholders.

Effective leadership

It's important for the Marketing Owner to be an effective leader. This means that the team should always be able to ask why work was chosen and what outcome is desired, but the Marketing Owner needs to stay out of the team's way when it comes to how the work will get done. I make the clear distinction between the Marketing Owner's role and the rest of the team by saying, the Marketing Owner owns the "what" and the team owns the "how". If the Marketing Owner is overly prescriptive, they aren't likely to get the most creative and innovative ideas from the team. ■

Along the Route: 6 Agile Marketing Roles

Chapter 18: Agile Champion

Let's dive into the role of Agile Champion. This role is similar to a Scrum Master in Scrum, but with a greater emphasis on the part about "championing agile."

In the early days of my agile career (and even once recently) I worked as a Scrum Master, so I can speak from a lot of personal experience about this role. This is the most confusing role for hiring managers because it's so unlike any other typical job description at a company. Because of the lack of understanding of this role, we've seen a lot of bad Scrum Mastering. This has led to some misunderstandings around the value of this role, and in marketing, it's a tough sell.

What is a Scrum Master?

Before we dive into the Agile Champion role, I want to ground you in what a Scrum Master role is (and was meant to be).

A Scrum Master owns the agile process on a team. According to Scrum, this is a fully dedicated role that doesn't perform any work on the team but helps to unblock the team, teach Scrum to the team and the organization, facilitate meetings and help to make organizational change happen.

Why is the Scrum Master role a tough sell?

I think the meaning of Scrum Master was well intended, but over the years companies have watered down this role. In many large companies, project managers aren't needed as much, so they get converted to the role of Scrum Master. While this works for some people, many people are great project managers, but terrible Scrum Masters.

> **"Because of all the baggage around the role of Scrum Master, even though I think it's a valuable role if done well, it's not one that marketers are buying into very often.**

Over the years, I've seen a number of problems with the execution of this role including:

- Leading the team by command and control methods.
- Becoming the team's admin, facilitating meetings and taking notes, but otherwise adding little value.
- Being too much of a doer, and trying to do the team's work instead of being neutral.

From those three anti-patterns alone, you can see why this role is a tough sell. However, in software development, it's so common that hiring for this role is pretty standard. Meanwhile, marketing runs like a lean machine, and asking for a full-time dedicated role that doesn't deliver — well, you can see where that's going.

How is the Agile Champion different from a Scrum Master?

Because of all the baggage around the role of Scrum Master, even though I think it's a valuable role if done well, it's not one that marketers are buying into very often. So, how do we deliver the good parts of that role and get rid of the baggage? That's where the Agile Champion comes in.

First of all, we chose the name carefully. When working with clients, we heard a lot of push back about being called a Scrum Master. We also wanted to really emphasize that this role is about championing agile ways of working, and not about project management.

In the Agile Marketing Navigator framework, the Agile Champion doesn't have to be a full time dedicated role. It can be, but it's not a requirement. Why? Because we'd rather see someone who's excited about agile marketing lead this, even if they have another role on the team, than to try and force a full-time position for someone who doesn't fit the bill.

The Agile Champion helps the agile marketing team:

- Break through legacy ways of working.
- Get excited about agile marketing.
- Coach and mentor others about agile marketing.
- Become more accountable and self-organizing.

The Agile Champion also listens to the team's concerns and helps solve their problems.

I've seen a lot of success in this role with people that you wouldn't expect to take it on. I had a team graphic designer that volunteered for this position and loved it so much that her company did make it a full time role.

A great Agile Champion is someone who wants to learn about agile marketing and can build excitement around it for the organization. ■

Along the Route: 6 Agile Marketing Roles

Chapter 19: Supporting Cast

The Supporting Cast role is unique to marketing and you won't hear this term in other agile frameworks. Here's how we describe this role in the Agile Marketing Navigator:

The Supporting Cast are important contributors who do occasional work for the team. They serve as consultants to the team, joining them when they are actively involved with work in the Launch Cycle. This cast is often comprised of agency partners or very specialized skill sets that service all of marketing.

> **"A high-level strategy should be agreed upon by the Marketing Owner and Supporting Cast members, but they will also iterate throughout execution, as delivering quick experiments and their results is really what we're after.**

Why did we add a new role?

You may be wondering why we're adding a new role. It was created primarily to identify the nature of interaction with agency partners, many of which are critical players in marketing departments. Since this has never been talked about before, we're covering new ground with this role, and it will probably be refined over time.

As we've worked with teams, we often coach and train the team — and the agency partners are left out. When the team comes back to them with a completely new way of working, there's a culture clash.

So, let's just knock this one out from the get-go and help to define how these relationships should work in an agile marketing environment.

Where do agency partners fit into agile marketing?

The teams that I've seen embrace this the most effectively bring agency partners close to the team. While they may not be the core group that does day-to-day work, it's critical that they understand their client's agile approach and how they fit into it.

First of all, if your budget allows for it, agency partners should attend any agile marketing training with the team to gain a shared understanding. This will get everyone on the same page right away.

In a typical client/agency relationship, the agency does a lot of the strategy work and presents it to the client. In agile marketing, this shifts a bit and the agency and Marketing Owner partner on this together, constantly communicating on business goals and what makes sense.

In agile marketing, we don't remove strategizing, but it's not as heavy upfront. A high-level strategy should be agreed upon by the Marketing Owner and Supporting Cast members, but they will also iterate throughout execution, as delivering quick experiments and their results is really what we're after.

The Supporting Cast members may be heavily embedded with the team during certain projects where they're delivering work. However, there may be times when they're more removed because they don't have active work happening.

When the Supporting Cast members have work in the cycle, they should attend team meetings daily so that everyone is working in real time.

Building a partnership

The Supporting Cast members become true partners with the agile marketing team. One of the toughest things here is for the agencies to show vulnerability. It's no longer about being pixel-perfect or having all of the "right" answers before coming to a meeting. The relationship becomes more of a peer-to-peer one where agencies and the team ideate and collaborate together.

When agencies are the "team"

In some cases, work is outsourced to agencies and they actually are the team, not necessarily the Supporting Cast. This is true if the majority of work being delivered is being done by an agency. In those cases, treat them like any other team member and have them actively involved with the day-to-day collaboration happening.

Whether people are Supporting Cast members or part of the agile marketing team, it's important to carve out roles and expectations early on and adjust them if needed. ■

Along the Route: 6 Agile Marketing Roles

Chapter 20: Practice Lead

The Practice Lead role is unique to marketing and you won't hear this term in other agile frameworks. Here's how we describe this role in the Agile Marketing Navigator:

"This role consists of leaders of functional departments. In agile marketing, their role changes significantly. They no longer manage their employees' day-to-day work, but instead, lead the functional area to achieve optimal quality and best practices through a Center of Excellence that services all of the agile marketing teams."

Why did we add a new role?

We've added the role of Practice Lead to this framework because so often in Scrum or other agile ways of working, everyone assumes that agile is only for the team that's delivering Marketing work. If we look at agile from a wider lens, it's about culture change and mindset shifts. In order to be successful at those, everyone in the organization needs to understand that they are part of the change.

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How is a Practice Lead different from a manager?

Since the agile role of Practice Lead is someone who is likely a manager, how are these roles different? The role doesn't change whatever corporate job responsibilities or titles that this role has — but how they interact with their direct reports that are working on an agile team does change.

The most significant change is that agile teams don't get work direction from their manager, which is often a key responsibility. Instead of assigning work, a Practice Lead should focus on enabling their team members to do their job effectively.

The concept is a lot like the difference between a manager and a leader. A manager gets into how the sausage is made, whereas a leader helps provide skills and mentorship so that others can make the sausage more effectively.

Key responsibilities of a Practice Lead

While the key responsibilities could vary quite a bit from company to company, some things to be thinking about as a Practice Lead who has direct reports on an agile team are:

- Do team members have access to the latest tools and technology to perform their job?
- Is there a repository of assets that can be used across teams (design assets, content, etc)?
- Are my employees working across teams and able to share best practices and learnings with each other?
- Are quality standards understood and followed across all teams?
- Do team members have a way to grow their skills or expand their knowledge?

Letting go of control

One of the hardest things about being a Practice Lead is letting go of command and control ways of working. A Practice Lead should get comfortable with failure and encourage their employees to work out of the box with courage.

The biggest thing you can do to be successful in this role is to trust your people. They need to be trusted to do the right thing, and if they don't, to learn from their mistakes.

It's your responsibility to set guidelines for what success looks like and provide encouragement. If the people you employ continually fail to meet your expectations, they may not be a good fit for an agile team or you may not be setting them up for success. In either case, trust is a must to succeed with agile marketing.

Establishing a Community of Practice

A Community of Practice is a great way to gain alignment for employees that work across teams. As a Practice Lead, a key role would be to start and maintain a Community of Practice. This is a group of everyone within a common discipline, such as graphic design, that work together and collaborate around the best tools, skills, assets and more.

A Community of Practice is often run like an agile marketing team, prioritizing needs into a backlog and working together to accomplish common goals. As a Practice Lead, you would be responsible for prioritizing the needs of the practice and keeping it going. However, you become more of a facilitator than a boss in this way of working, soliciting input and partnership from everyone in the practice.

We hope that you find the role of Practice Lead helpful as you navigate your agile marketing journey. ■

Along the Route: 6 Agile Marketing Roles

Chapter 21: Stakeholders

The role of a Stakeholder is not new to agile marketing, however, it's not explicitly talked about in other agile frameworks. Here's how we describe this role in the Agile Marketing Navigator:

"Stakeholders have a vested stake in the work that the marketing team produces. This group often comes from Sales, Product Development and Customer Service departments. Stakeholders participate in the Collaborative Planning Workshop and offer feedback during the Team Showcase."

How to identify your team's stakeholders

There are many stakeholders in an organization, but the ones we're concerned with in agile marketing are the people that directly care about the outcomes the team is producing. That list of Stakeholders might remain constant, or it could change regularly, depending on the nature of the work. Some teams have a large number of Stakeholders, whereas others have a select few.

To identify whether someone is a Stakeholder in your agile team, ask yourself the following questions:

> **"While an agile marketing team is self-organizing, it's important that they keep a clear line of communication open between the team and the Stakeholders.**

- Did this person request work from the team?
- Do I regularly update this person on the team's work?
- Has this person previously asked for a status report?
- Is this person responsible for delivering on business goals that tie directly to the work your team is doing?
- How do Stakeholders request work?

While an agile marketing team is self-organizing, it's important that they keep a clear line of communication open between the team and the Stakeholders. The work the team is doing should be transparent to Stakeholders at all times.

The Marketing Owner on the team is responsible for managing Stakeholder relations. The Marketing Owner ultimately gets to prioritize what work the team will do and in what order, but needs to be having regular conversations with Stakeholders.

As a Stakeholder that requests work, it's important to share with the Marketing Owner why your work is important and how it fits into the agreed-upon Guidepoint that you co-created. You may have to be flexible and understand that some trade-off decisions may need to be made and not all requests may get worked on.

The work requests will go on the team's Marketing Backlog, as long as the Marketing Owner believes that the work will contribute to the value the team is trying to achieve. Some teams allow anyone to contribute ideas to the backlog, while others set it up as a conversation with the Marketing Owner. Your organization can determine this process for what works best with your current culture.

Communicating with Stakeholders

The team needs to be transparent about when the work might get done and keep you informed in a timely manner if priorities change. The Blueprint document that gets created at the beginning of the project or quarter is meant to be a conversation starter between the Marketing Owner and the Stakeholders.

The Blueprint should be discussed during each Team Showcase (and more often on a 1:1 basis if needed). This way everyone knows what buckets of work are coming up next, if they're still the highest priority, and if not, what priority may replace it (note: we aren't adding more work, but switching out priorities).

> **"During the Team Showcase that happens at the end of each Cycle, Stakeholders with a vested interest in the work should attend and be ready to ask the team questions and offer suggestions for future work.**

Stakeholders' role at the Team Showcase

During the Team Showcase that happens at the end of each Cycle, Stakeholders with a vested interest in the work should attend and be ready to ask the team questions and offer suggestions for future work. Keep in mind that this isn't an approval meeting. At this point, the team has delivered work, but it's to see what they've done, hear how various tactics are performing in the market, and have a collaborative conversation around what work should follow, or how work that was done may need to be altered or improved upon for upcoming Cycles.

As a Stakeholder, try to leave your personal opinions out. Instead of saying, "I wish that button was red," you may want to ask the team, "How have customers responded to the blue button? Have you tried testing it in another color to see if people submit more requests?" This empowers the team to take your suggestions in a data-driven manner versus merely an opinion.

Stakeholders' role at the Collaborative Planning Workshop

Stakeholders should also participate in the Collaborative Planning Workshop at the beginning of the quarter or project. As a Stakeholder, you are an active participant in this collaboration. We ask that you raise any objections to the Guidepoint if it doesn't align with where you were hoping it would go. It's important to have these transparent conversations early and get on the same page with the team.

From there, the Brainstorm happens and even if you aren't a marketer, contributing ideas from a customer perspective adds value. After this session, the Blueprint gets put together by the Marketing Owner, but you should make sure that you are in agreement with the priorities shown. If not, it's your responsibility to bring it up early and have a conversation with the Marketing Owner. However, at the end of the day, it is the Marketing Owner's decision as this role has to balance all Stakeholders' needs.