

Agile Marketing Navigator™

A practical framework for navigating agile marketing



Stop #1: 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.

When

Quarterly, or when planning a large campaign or project.

Who

Agile marketing team and stakeholders

4 Key Components

Guidepoint, Brainstorm, Minimally Viable Launch, Blueprint



Stop #2: Launch Cycle

The Launch Cycle is a repeatable cadence for delivering valuable marketing experiences early and often.

When

5 or 10 day cycles

Who

The agile marketing team

5 Key Components

Marketing Backlog, Cycle Planning, Daily Huddle, Team Showcase, Team Improvement



Along the Route 6 Agile Marketing Roles

The Agile Marketing Navigator identifies 6 roles in agile marketing, both inside and outside of the agile team.

Who

Team, Marketing Owner, Agile Champion, Supporting Cast, Stakeholders, Practice Leads



Along the Route 6 Key Practices for Agile Marketers

The 6 Key Practices are optional practices for teams to use where they see fit.

What

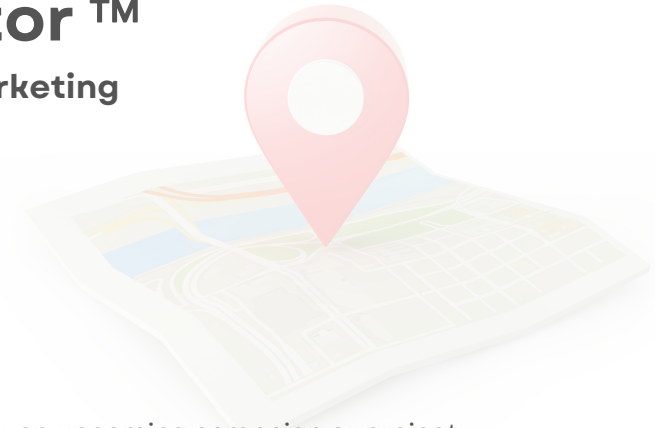
Customer Stories, Story Points, Work in Progress Limits, Cycle Time, Waste Removal, Partnering

Why

We've come together as an agile marketing community to create a flexible, adaptable and customizable framework for marketers, by marketers, inspired by what we've seen really work in our world. You can use this framework as navigation for your agile marketing implementation, picking and choosing pieces that meet your needs.

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Collaborative Planning Workshop 4 Key Components

#1 Guidepoint

The Guidepoint helps the team and stakeholders navigate what success looks like for an upcoming campaign or project. Stakeholders come to the workshop with business goals 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.

#2 Brainstorm

The team brainstorms all possible tactics in order to deliver work that aligns to the Guidepoint. This empowers team members to collaborate and achieve innovative new ideas and gives the team a consultative approach to solving the business problem.

#3 Minimally Viable Launch

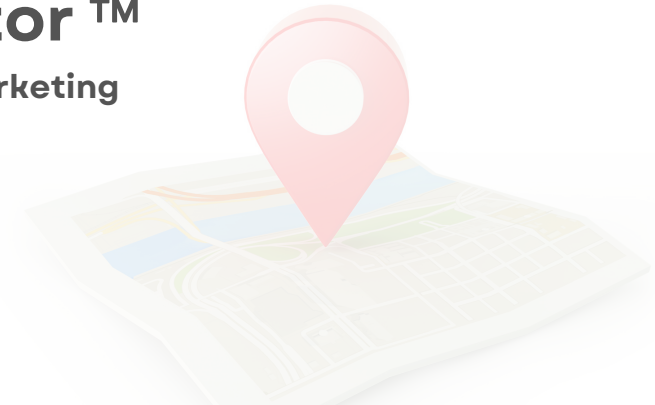
From the brainstorming tactics activity, the team and stakeholders discuss which ideas provide the most value based on the set Guidepoint. They should also consider level of effort, availability of staff and timing needed. Then, set a smaller time frame, such as one month or one week in which the highest value ideas could be launched. This becomes the Minimally Valuable Launch. Ideas that don't make the first cut may be implemented later.

#4 Blueprint

A blueprint is a flexible plan that is a direct output of the Collaborative Planning Workshop. The blueprint should be simple in nature, showing the high-level work the team plans to achieve in the upcoming time period. The blueprint should be regularly reviewed with stakeholders during the Team Showcase as priorities and customer needs change.

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Launch Cycle 5 Key Components

#1 Marketing Backlog

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. Marketing Backlog items are often written as Customer Stories.

#2 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 in this launch.

#3 Daily Huddle

The team huddles for a short, set time each day. This should feel more like a football team huddling to make its next play than a status update. The team coordinates timing on work in progress, shares any updates or feedback from campaigns in flight, and asks for help from team members. The goal is to make progress towards the work they plan to launch during the cycle.

#4 Team Showcase

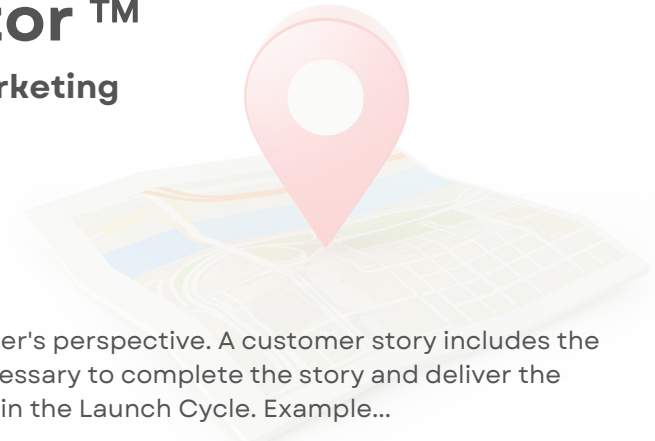
This is an event where the team can showcase the work they completed in the Launch Cycle and get feedback from stakeholders. Additionally, the team shares any relevant performance metrics in order to learn through experiments and data over opinions and conventions. Additionally, the group reviews the 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.

#5 Team Improvement

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 at their most recent Launch Cycle helps the team learn from actual events.

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6 Key Practices for Agile Marketers

#1 Customer Stories

Customer Stories are how Marketing Backlog items can be written to view work from a customer's perspective. A customer story includes the WHO, WHAT and WHY of the work. Within the story, individual team members create tasks necessary to complete the story and deliver the increment of customer value. The goal is to make the story small enough to be completed within the Launch Cycle. Example...

As a {WHO} resident doctor, I want to {WHAT} easily sign up for a webinar so that {WHY} I can explore which hospital I would like to work at when I complete my residency.

#2 Story Points

Story Points are a simple estimation technique that quickly compares the effort of one type of work to another based on a point scale. The team should bucket common work into work item types such as blog, social post or paid ad to establish a point scale. The smallest numbers are for the easiest deliverables and higher numbers represent more complicated work. The recommended scale is:

1, 2, 3, 5, 8, 13, 20

#3 Work in Progress Limits

Most marketing teams are plagued with too many stories in progress at once, making them get a lot of work started, but not a lot finished. With agile marketing, finishing fewer stories but getting them to customers is more valuable than how much work is happening at once. The agile marketing team sets its Work in Progress (WIP) limits to achieving a sustainable flow. If too many items are in progress at once, work isn't finished. If too few are in progress, team members may not have enough to do. The team figures out its optimal flow by working together over time.

#4 Cycle Time

This practice helps you gauge how long it takes the team to get various pieces out the door. Let's say that your team is complaining that the process for executing a webinar is too slow. By measuring cycle time, the team can show stakeholders where slowdowns may be happening. Cycle time is measured by calculating the average time it takes for each step in the workflow to understand total duration.

#5 Waste Removal

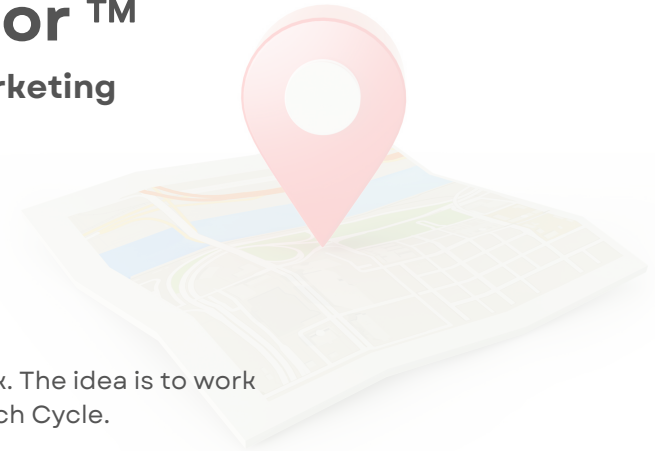
After measuring cycle time, your team should identify where slowdowns in the workflow are happening and look to improve the current process. For example, Legal reviews may be taking 5 days after work is complete, but perhaps the team can notify Legal before they start work when they will need a sign off, and work to get it down to 2 days. Removing waste can take on other forms, such as meetings that aren't providing value. The team should be empowered to look for ways to streamline the way they work.

#6 Partnering

When team members can partner on work, there's a better chance that stories will get launched more quickly. Instead of waiting for content to be 100 percent complete before it goes to design, the writer and designer should partner on the story at the beginning to see where they can work in parallel.

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6 Agile Marketing Roles

#1 Team

An agile marketing team is made up of everyone, regardless of job title, that contributes work. The idea is to work collaboratively with collective ownership for getting valuable marketing delivered each Launch Cycle.

#2 Marketing Owner

The Marketing Owner is responsible for stakeholder relations and prioritizing work. This role has authority and respect from leaders to determine what the team will work on next. This role also updates the Blueprint as priorities change. This role should understand customers, the marketplace and the future direction of work for the team.

#3 Agile Champion

The Agile Champion coaches the team and the organization on agile ways of working. This role champions change and the Agile Marketing Values, Principles and practices, working to empower teams to take ownership and accountability.

#4 Supporting Cast

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.

#5 Stakeholders

Stakeholders have 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.

#6 Practice Leads

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.

Who

**Co-created by
Stacey Ackerman & Michael Seaton**

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