
The Agile Marketing Method

Using The Values And Principles Of
The Agile Software Development
Methodology To Improve Marketing

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Introduction

Sixty years after the advent of software development, The Agile Software Development Methodology was created to revolutionize how software projects were delivered, improving on product quality, reducing development time, and increasing customer satisfaction.

Emphasizing collaboration and building a quality product over meeting arbitrary deadlines, Agile has been so successful that it is being used to create software in virtually every industry.

Even non-IT enterprises are using Agile's values, principles and key parts of the Agile development process to improve their project success rates.

While there are a lot of resources out there that can teach you all you want to know about Agile, the focus of this guide is to show you how you can apply the values and principles of the Agile Methodology to your marketing projects to improve results.

First, we'll take a look at a brief history of software development methodologies and go through a high-level overview of the Agile Methodology just to give you a basic understanding. Then, we'll look at the case for using the Agile Methodology to complete marketing projects. Finally, we'll take a guided tour of how to implement the Agile Methodology within a marketing team.

By following the steps laid out in this guide, the Agile Methodology can easily be used to improve collaboration and increase efficiency, productivity and creativity in every marketing project.



Background: How Agile Methodology Came To Be

Continually evolving over the years, software development began in the 1940s with a very basic development method known as Code-and-Fix when, as the name suggests, developers would code software then go back and fix errors as they found them. This was also known as “Big Bang” development because software projects were delivered whole after the entire application had been developed. While not delivering software, some marketing departments are still delivering projects in this manner today.

Flash forward to the 1950s and developers incorporated some specific, sequential stages into their development process: Requirements, Design, Development, Integration, Testing and Deployment. The addition of stages and moving forward through those stages to develop software programs eventually would become known in the 1970s as the Waterfall method and is still widely used by developers today. It is important to note that most marketing departments complete projects using methods very similar to Waterfall. In other words, a lot of marketers are stuck in the 1970’s!

That can be an issue because, while still widely used, Waterfall has a number of disadvantages. While stages were added to the development process with Waterfall, deliverables still come at the end of the project, making any change in requirements during development difficult. If business needs change during development, there is no process to address adding these changes into development. If customers insist on adding in these changes, the project delivery date is delayed. In addition, customers are not heavily involved in the development process, causing them to feel disjointed from the project.

To combat the remaining issues of Waterfall, in the late 1980’s, developers began to try incremental and iterative approaches, regularly delivering applications in smaller chunks of working code, learning from feedback, and building time into the process to make improvements based on that feedback. Originally popularized as the Spiral Methodology in 1988 and Rapid Application Development in the 1990’s, this dual incremental and iterative approach would lead to the Scrum and Extreme Programming methodologies, which placed emphasis on short iterations.

Then, in 2001, a group of developers came together to take the iterative approach to its next level, and the Agile Methodology was born. In Agile, developers learn from iterations in the development cycle and apply what they have learned to the next iteration. Everyone involved in an Agile project works closely together to ensure project success. The developers that created Agile even took the time to write out the core values and principles of the Agile development process so that everyone could easily implement them.

Background: Not Just For Developers Anymore

As the Agile Methodology has grown in popularity and the list of projects that have been successfully implemented using the method continues to grow, it is now being used by enterprises for increasingly complex projects across an increasingly wider array of industries.

In fact, Agile has become so prevalent and successful that professionals outside the software development discipline, including those in accounting, legal, business, transportation, and manufacturing, have begun to use the method's values and principles as part of their project management and development efforts.



Background: Agile's Values And Principles

Below are the values and principles that the creators of the Agile Methodology wrote out for developers all over the world to use. It is important to have a basic understanding of these principles in order to understand the Agile Methodology and its benefits. Later, we'll take a look at how these values and principles can apply to marketing.

The Manifesto for Agile Software Development, which outlines the methodology's four core values:

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

Individuals and interactions over processes and tools
Working software over comprehensive documentation
Customer collaboration over contract negotiation
Responding to change over following a plan

That is, while there is value in the items on the right, we value the items on the left more.



Background: Agile's Values And Principles

The twelve principles that reinforce the manifesto:

- 1. The highest priority is to satisfy the customer through early and continuous delivery of valuable software.*
- 2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.*
- 3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.*
- 4. Business people and developers must work together daily throughout the project.*
- 5. Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.*
- 6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.*
- 7. Working software is the primary measure of progress.*
- 8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.*
- 9. Continuous attention to technical excellence and good design enhances agility.*
- 10. Simplicity — the art of maximizing the amount of work not done — is essential.*
- 11. The best architectures, requirements, and designs emerge from self-organizing teams.*
- 12. At regular intervals, the team reflects on how to become more effective and then tunes and adjusts its behavior accordingly.*

* Agile Manifesto Copyright 2001: Kent Beck, Mike Beedle, Arie van Bennekum, Alistair Cockburn, Ward Cunningham, Martin Fowler, James Grenning, Jim Highsmith, Andrew Hunt, Ron Jeffries, Jon Kern, Brian Marick, Robert C. Martin, Steve Mellor, Ken Schwaber, Jeff Sutherland, Dave Thomas. This declaration may be freely copied in any form, but only in its entirety through this notice.

The Case For The Agile Marketing Method

Now that you know the basics of Agile and how it works, let's look at how the principles can be applied to marketing.

Marketing strategy consultant CMG Partners recently conducted a qualitative survey assessing the role and responsibilities of Chief Marketing Officers and found that applying the Agile Methodology yielded greater marketing effectiveness and efficiency.

Marketers no longer have months to spend creating large projects, but must innovate and produce in ever-shrinking turnaround times. The CMG Partners report states using the Agile Methodology within marketing "drives long-term marketing strategies with short-term, customer-focused iterative projects that improve responsiveness and relevance. It allows for faster creative, more testing, smarter improvements and better results."

The survey also found that while 63% of marketing leaders considered agility a high priority, only 40% felt they were agile.

I like to call the application of Agile Methodology to marketing projects The Agile Marketing Method. This method follows the values, principles, and processes of the Agile Methodology in order to properly manage impactful marketing projects.

By following the processes outlined in this guide, marketing departments can increase alignment with the business goals of the organization, improve communication, and increase the responsiveness and speed of work completion.



The Agile Marketing Method: Values And Principles

This is all well and good if you're developing software, but how does this apply to marketing projects? Well, by slightly tweaking these proven software development values and principles, they can easily apply to your marketing projects.

The Agile Marketing Method Manifesto, which outlines the methodology's four core values:

There are better ways of completing marketing projects. We must value:

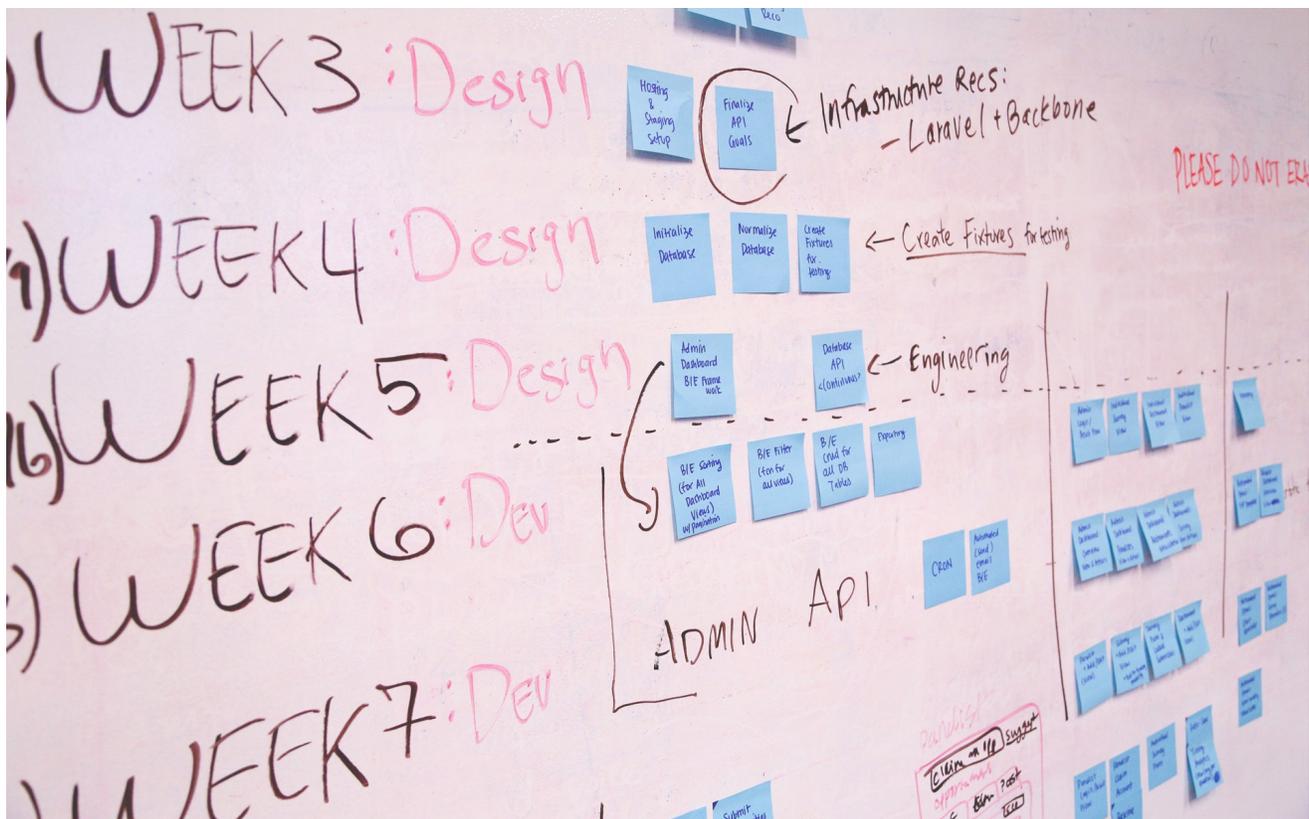
Individuals and interactions over processes

Efficient marketing tool creation over meeting internal team needs

Team collaboration over individual expertise

Responding to change over following a plan

While there is value in the items on the right, we value the items on the left more.



The Agile Marketing Method: Values And Principles

The twelve principles that reinforce the manifesto:

- 1. The highest priority is to satisfy customers through early and continuous delivery of their projects.*
- 2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's advantage.*
- 3. Deliver high-quality, usable projects frequently, in the shortest possible time.*
- 4. All stakeholders must work together daily throughout the project.*
- 5. Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.*
- 6. The most efficient and effective method of conveying information to and within a team is face-to-face conversation.*
- 7. Useable marketing tools are the primary measure of progress and success.*
- 8. Agile processes promote sustainable project completion. The customers, producers, and end users should be able to maintain a constant pace indefinitely.*
- 9. Continuous attention to excellence, good design and project completion enhances agility.*
- 10. Simplicity is essential. Always be mindful of the easiest way to complete the project the best way possible.*
- 11. The best plans, requirements, and designs emerge from self-organizing teams.*
- 12. At regular intervals, the team reflects on how to become more effective and then tunes and adjusts its behavior accordingly.*

The Agile Marketing Method: Roles

The Agile Marketing Method process is heavily reliant upon team members taking on very specific roles and performing those roles in a dedicated, professional manner.

Stakeholder

- Usually the actual requestor of the project
- Financially impacted by the outcome of the project

Project Owner

- Acts as intermediary between the Stakeholder and Production Team
- Clarifies details regarding the project
- Accepts or rejects completed work

Project Manager / Production Team Lead

- Maintains a prioritized list of work items
- Tracks down solutions to project blockers
- Develops project strategy and direction
- Sets project long- and short-term goals
- Gathers, prioritizes and manages project requirements
- Creates Project Requirements Doc
- Manages project budget and profitability
- Ensures project has needed resources

Production Team Member

- Focuses on producing the actual solution
- Identifies, estimates, signs-up for, performs and tracks completion of tasks

Specialist / Technical Expert

- Brought in as needed to help overcome problems
- Provides specialized or technical expertise as needed



The Agile Marketing Method: Components

Project – The item that is identified as being needed.

Project Requirements Doc – Written document that describes the Project's requirements in detail used by Team Members as a guideline for all work done on the Project.

Project Backlog – A running list of all identified Projects that still need to be completed.

Sprint – A pre-determined length of time used for Project completion planning. This is usually two to four weeks.

Sprint Planning Session – Occurring prior to the start of a Sprint, this is a team meeting where the Project Backlog is reviewed and the highest priority Projects are moved to the Sprint Backlog. Project planning and time estimation for the Sprint will occur during this meeting.

Sprint Backlog – A list of all Projects that are to be completed during a Sprint.

Sprint Tasks – The breakdown of Projects on the Sprint Backlog into written tasks to be assigned and completed.

Daily Stand-up Meeting – Daily meeting, usually as early in the morning as possible and lasting no longer than 15 minutes during which team members discuss Project work that was completed the previous day, blockers for any work that was not completed the previous day, as well as the work that should be completed by the next Daily Stand-up Meeting.



The Agile Marketing Method: Process Overview

Project Planning

Once a needed Project is identified by a Stakeholder, the Project is added to the Project Backlog to be discussed at the next Sprint Planning Session where all team members meet to ensure the entire scope of the Project has been properly recorded, broken down into smaller Sprint Tasks and ranked in priority order. Based on what is discussed at the Sprint Planning Session, The Project Manager / Production Team Lead provides a written Project Requirements Doc to the entire team, complete with estimated work times and delivery dates. Estimated work times should be based on small Sprint Tasks that can be delivered in no longer than a four-week period.

Developing Sprint Tasks

A Sprint Task is a written description of a Project task that outlines what the requirement should accomplish and for whom. It should have a title, description of the end user or target audience, a description of what needs to be accomplished and the benefit of the Sprint Task to the Project and Stakeholder. Sprint Tasks can be written out on cards or managed in the digital world in a spreadsheet or database. Sprint Tasks will be managed by the Project Manager / Production Team Lead.

Estimating Work Times

For each Sprint Task, a discussion among the team should take place as to the estimated time it will take to complete the needed work. This will let the entire team see if the Sprint Task can be completed in a set amount of time or if more time is needed.

Ongoing Discussion and Collaboration

Each day throughout the Sprint, the entire team will attend Daily Stand-up meetings to discuss Project status and any blockers to progress.

Results Meeting

As Sprint Tasks are completed, a quick Results Meeting should be called with all relevant team members so the completed work can be reviewed. Feedback should be gathered and recorded as changes either on the piece being presented or in the written Sprint Task. If feedback leads to a minor amount of changes, Project scope and delivery should continue as planned. If feedback leads to major changes that will affect the length of the Project and Sprint Tasks, the Project schedule should be updated accordingly. Meetings where results are presented should be repeated until the Project requirements are complete.

The Agile Marketing Method: Process Overview

Project Post-mortem

After each Project is completed, the team should hold one final meeting to review the Project's Requirements Doc and timeline to discuss the successes and failures of the Project so that lessons can be applied to future projects.



Process Step-by-step Workflow

1. Project Identified
2. Added to Project Backlog
3. Discussed at Next Sprint Planning Session
4. Scope Recorded
5. Divided Into Sprint Tasks
6. Sprint Tasks Estimated, Prioritized and Scheduled
7. Project Requirements Doc Created
8. Work Commences
9. Status Discussed at Daily Stand-up Meetings
10. Completed Sprint Tasks Reviewed at Results Meetings
11. Project Post-mortem Meeting to Review Successes & Failures

The Agile Marketing Method: Action Plan

Now that you know the basics of Agile, how and why we'd apply the principles to marketing, as well as the roles, components and processes of The Agile Marketing Method, let's take a look at a sample action plan that you can implement for your marketing department. It is important to realize that the Agile Marketing Method, while in theory, should work for any and all marketing projects, it's success is reliant upon your team's involvement and support from your management team. It is also important to note that this sample plan is just that – a sample. You will need to take this sample plan and develop it into your own plan - a plan that fits your specific marketing department and team needs.

You will need to determine which projects to cover under your Agile Marketing Method, how long your Sprints should be, when you will have your Sprint Planning Sessions as well as how many hours of work each week will be dedicated to actual production time for each member of your marketing team. You can use this sample plan as a guide for making these determinations specifically for your organization.

The following is a sample Action Plan:

Covered Projects	Longer than 1 hour
Sprint Length	2 calendar weeks (M-F)
Sprint Planning Session	2nd Wednesday of the Sprint
Production Hours	30 hours per week per Team Member
Daily Stand-up Meetings	M-F from 9:00 – 9:15 AM

Covered Projects

The Agile Marketing Method should govern any marketing Project that will take longer than 1 hour to complete. All Projects will be placed in the Project Backlog to be reviewed at the next Sprint Planning Session. The Project Backlog should include the Project name, requestor, requestor's priority and due date.

Sprint Length

Marketing sprints will span two work weeks, running first Monday to second Friday.

The Agile Marketing Method: Action Plan

Sprint Planning Session

The Sprint Planning Session will take place on the second Wednesday of the Sprint to plan for the next Sprint. The session will last up to four hours initially and have two parts. The first is the review of the Project Backlog to ensure all items are logged and their scope is completely understood. The second part of the session consists of the team working together to break down the Project Backlog items, from highest priority downward, into Sprint Tasks and hourly estimates. Each Project should have a clearly defined Project Manager, team roster with list of responsibilities and a list of tasks with time estimates and due dates.

Production Hours

Sprint planning best practices suggest that only 75% of available work time be designated as actual production time against the Backlog, resulting in production time of 30 hours per week per Team Member. These 30 hours must also include all of the meeting time for the Projects in the backlog. Meeting time must be accounted for in the hourly estimates discussed during the sprint planning session. The two hours daily that are not scheduled for production are to account for email, impromptu discussions, breaks and to provide a time cushion for Project time underestimation. Based on the amount of available hours, each Team Member's Sprint Tasks for that particular Sprint will be moved to the Sprint Backlog, which will be the focused task list for the two-week Sprint.

Request Process

A formalized, department-wide, documented Project request process will need to be developed and enforced upon all areas of the company that request work from the marketing department. This will ensure the highest priority Projects are completed first.

Project Calendar

A day-based production calendar with six hours a day devoted to production time should be created to document the Projects that will be worked on in that six-hour span. The calendar will need to be dynamic because while sprints are planned to encompass the exact amount of work that can be completed in two weeks, in reality, emergency Projects will come up.

The Agile Marketing Method: Creating Backlogs

One of the easiest ways to create a Project & Sprint Backlog is to use a spreadsheet. For most marketing departments, or segments of marketing departments in larger enterprises, an ongoing spreadsheet is a robust enough solution to track and complete marketing projects.

While you can feel free to customize your spreadsheet as needed, I have found the following to be very effective:

Project Name	Project Type	Requestor	Request Date	Start Date	Due Date	Completion	Priority	Status	Notes
Project 1	By-Line Article	Rick	1/1/01	1/2/01	1/3/01	1/4/01	High	Complete	Rick Approved
Project 2	Knowledge Base	Sandy	1/1/01	1/2/01	1/3/01		High	Active	
Project 3	Press Release	Janice	1/1/01	1/2/01	1/3/01		High	Active	
Project 4	SEC Filing	Bob	1/1/01	1/2/01	1/3/01		Medium	Out For Review	Bob Reviewing
Project 5	Collateral Sheet	Herb	1/1/01	1/2/01	1/3/01		Medium	Active	
Project 6	Blog Post	Cecil	1/1/01	1/2/01	1/3/01		Low	Active	
Project 7	Website Bio	Frank	1/1/01	1/2/01	1/3/01		Low	Pending	Frank Starting 1/7/01
Project 8	Social Media	James	1/1/01	1/2/01	1/3/01		Low	Active	Post On A Slow News Day



The Agile Marketing Method: Sprint Tasks

While one of the most basic items within The Agile Marketing Method, depending on the size of your team and how you operate, individual Sprint Task Docs or Cards may end up being the most central part of your implementation of The Agile Marketing Method.

In many cases, smaller teams can operate with only the Project Requirements Doc, but for larger teams where a number of individuals may touch each step in the project completion process, recording requirements, changes, and progress on a Sprint Task Doc or Card may be the only way to keep track of a project.

For smaller teams, a word processing doc housed in a central document library can suffice. For larger teams, or those that just find the process to be easier, Sprint Tasks can be put on individual cards that can be passed around, tacked up on walls, moved from department to department, and team to team.

Either way, you will need to create a Sprint Task Doc or Card with the following info:



Project Title:
Project Requestor (Stakeholder):
Sprint Task Title:
Description:
Target Audience:
Sprint #:
Due Date:
Assigned To:
Delivery Format Required:

The Agile Marketing Method: Project Requirements

Another cornerstone of The Agile Marketing Method will be your Project Requirements Doc. Once a need has been identified, the Project's details and schedules will be managed within the Project Requirements Doc. At any time, any member of the team, and more importantly, people who may be joining the team midway through a Project, can see everything about the project in one central location, including all of the project requirements and intended delivery schedules.

Like all things within The Agile Marketing Method, you should customize the Project Requirements Doc to meet your team's specific project needs. Feel free to use the following example as a starting place, but be sure that your Project Requirements Doc is properly suited to your team, company, projects and workflow.

Project Requirements Doc

<Project Name>
Version 1.0
<Month 1, 2015>

Project Requirements Doc - <Project Name> Page 1 of 5

Project Requirements Doc

1. Executive Summary

1.1 Background / Project Overview
Describe the Project and its intended audience. Include any notes or key points the creative services team should know prior to beginning work on the Project. What is the primary purpose for this project? Is there a particular challenge the Stakeholder is facing? Are there market opportunities that should be kept in mind when completing this Project?

1.2 Objectives
What are the main reasons we are undertaking this Project? What action do we want the target audience to take? Objectives are often aligned with the overall business goals of the Project Stakeholder.

1.3 Target Audiences
Who is the piece directed towards? What is known about the target audience already that can help the creative services team strategically design and produce an effective marketing piece or campaign? What do we know about the audience's preconceived notions of the brand, product and message?

1.4 Primary Message
What is the main message this Project needs to communicate? What is the single most compelling statement that can be made in order to achieve the project's end goals? This should be no longer than a few sentences.

1.5 Message Believability
Why should the target audience believe the message, and why should they take action?

1.6 Call To Action
What is the overall desired CTA? Complete a form? Subscribe to a newsletter? Visit a specific URL? Make a purchase?

Project Requirements Doc - <Project Name> Page 2 of 5

The Agile Marketing Method: Project Requirements

Project Requirements Doc

2. Design Elements

2.1 Design Imperatives

What design elements need to be included? What brand elements (logos, taglines, boilerplates, etc.) need to be included? Do we need to include the logos of other partnering brands?

2.2 Design Items

This section will list out the design items needed for this Project (single sheet, blog image, trade show graphics, online ads, etc.). This will include specifications for pixel size, file size, etc. for digital items and printing specifications for print items.

2.2.1 Item 1

2.2.2 Item 2

2.2.3 Item 3

2.3 Design Guidelines

While not imperative, these are items that we feel have enjoyed success in the past or are elements we would like to be considered for inclusion in the design.

Project Requirements Doc - <Project Name>

Project Requirements Doc

3. Scheduling & Logistics

3.1 Priority & Desired Delivery Schedule

Priority	Item	Desired Delivery Date
1	Item 1	XX/XX/2015
2	Item 2	XX/XX/2015
3	Item 3	XX/XX/2015

3.2 Item Schedules

3.2.1 Item 1

Description	Desired Start Date	Desired End Date	Actual Start	Actual End
Initial Draft Creation	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Results Meeting #1	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Draft Revision	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Results Meeting #2	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Draft Revision	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Final Results Meeting	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015

3.2.2 Item 2

Description	Desired Start Date	Desired End Date	Actual Start	Actual End
Initial Draft Creation	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Results Meeting #1	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Draft Revision	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Results Meeting #2	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Draft Revision	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Final Results Meeting	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015

3.2.3 Item 3

Description	Desired Start Date	Desired End Date	Actual Start	Actual End
Initial Draft Creation	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Results Meeting #1	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Draft Revision	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Results Meeting #2	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Draft Revision	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015
Final Results Meeting	XX/XX/2015	XX/XX/2015	XX/XX/2015	XX/XX/2015

Project Requirements Doc

4. Requirements Confirmation/Stakeholder Approval

Include documentation of the approval or confirmation of the requirements here. For example:

Date	Project Item	Comments / Approved By
XX/XX/2015	Item 1	
XX/XX/2015	Item 2	
XX/XX/2015	Item 3	

Project Requirements Doc

5. Project Post-Mortem

5.1 Successes

5.2 Failures

5.3 Other Notes

Project Requirements Doc - <Project Name> Page 5 of 5

Follow The Steps

By following the steps outlined in this guide, taking some time to learn about the Agile Methodology and creating an action plan, every marketing organization can benefit from The Agile Marketing Method. There may be a bit of a learning curve and it might be a little slow-going at first, but if you've ever seen an Agile development team working like a well-oiled machine, you'll know that the efficient, customer-centric, highly-collaborative completion of marketing projects is within reach.



About

William L. Savastano is a business professional and two time Society for Technical Communication Award Winner with over two decades of experience in the corporate arena. William trained extensively in advertising and marketing copywriting, technical writing, journalism, and both print and electronic publishing. William's body of work includes a large volume of marketing content, collateral materials, websites, operating manuals, technical manuals, as well as inclusion in national publications and a number of published poems and short stories.

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