AGILE
for Marketing Teams
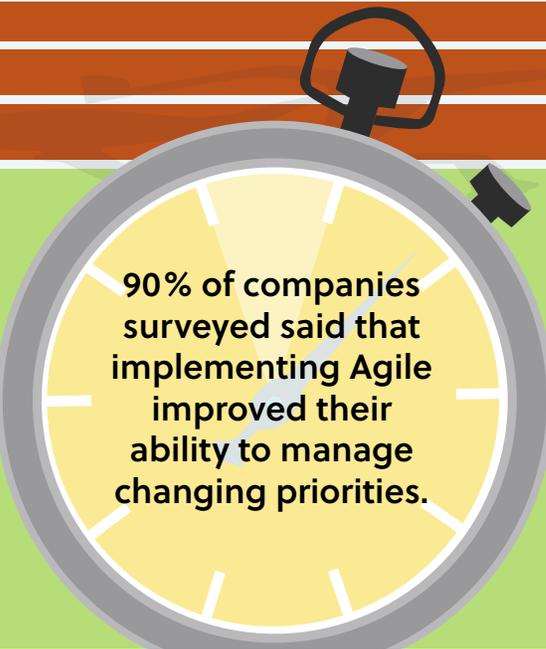
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Who doesn't want to move fast and be flexible to gain a competitive advantage?

More and more project teams in a variety of industries are embracing an Agile process as a better way to manage workflow and respond to a fast-changing market.

90% of companies surveyed said that implementing Agile improved their ability to manage changing priorities.

This best practices guide will give you industry-specific examples of how Agile can work for Marketing teams just like yours—and show you how the Agile style can benefit your team. And who knows, you might already be using an Agile process without knowing it! Read on to find out more about how and why Agile really is for everyone.

The birth of Agile

In 2001, a group of software developers gathered in Snowbird, Utah to ski and share ideas—and here, the **Agile Manifesto** was born. It's comprised of **12 principles** and has **4 common beliefs**:

1
Individuals and interactions over processes and tools

2
Working software over comprehensive documentation

3
Customer collaboration over contract negotiation

4
Responding to change over following a plan

TOP THREE AGILE BENEFITS

1 Manage shifting priorities

2 Increase productivity

3 Improve project visibility

The Agile approach

Agile is a set of fast and flexible processes that accounts for change, helps teams adapt to marketplace opportunities, and improve business performance. Agile was originally applied to software projects because it lets teams model a solution and incorporate feedback throughout the project lifecycle. However, an increasing number of teams outside the software industry are starting to embrace an Agile way of working because many of the same tenets of Agile can be applied to their project types as well.

Agile is perfect for any project that requires a series of versions or iterations that need to be reviewed and improved on until the final product is ready for prime time. Instead of waiting six months for a deliverable that is either flawed or no longer meeting the current requirements, Agile lets you produce a first draft within as little as two weeks (or less) for immediate feedback—and from here you can improve upon each version until the work product is complete.

Who uses Agile?

Any team with a project that evolves over time— especially when it's only with each new version that you know how and what to improve for the next version.

Project teams that work with service-oriented and non-physical deliverables like code, copywriting and design projects.

Teams that anticipate changes to take place during the course of a project, and need to make quick course corrections based on stakeholder feedback.

Teams that work with external agencies and need to collaborate more seamlessly to meet deadlines.

Teams that need a process that they can learn from and improve on for the next time around.

Businesses that want teams working collaboratively and creatively, with all team members engaged in the project management process.

Businesses with projects that require everyone working in the same place, and need rapid feedback from each version or draft (for example, new campaigns and product launches).

Businesses with clients who want to provide and incorporate feedback as the project evolves.

63% of marketing leaders indicate agility as a high priority...

...but only 40% rate themselves as Agile.
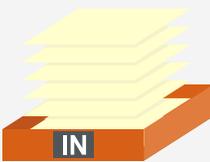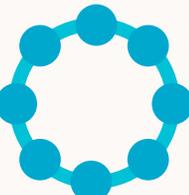
How Marketing teams use Agile practices

See how the traditional software implementation of Agile practices—terms and all—can be translated for Marketing teams.

Agile practice	What it means on traditional software projects	How a marketing team would put it into play
Time-boxed delivery	Deliver a continuous stream of value to the customer (e.g., produce an incremental package of features and fixes at short, regular intervals).	Deliver a regular email newsletter that announces new features, product changes and product updates.
Iterative development and more frequent releases	Deliver a prototype and improve upon it with every cycle. Each cycle is bundled together in a "release."	Create an onboarding email program by launching an initial short series of emails, and then adding more emails over time—instead of waiting for the entire project to be completed before launching.
User stories	A simple way to describe what you want in business language, for example: *As a <role>, I want <goal/desire> so that <benefit>.*	A creative brief that lays out all the requests, features and reasons for a project or campaign.

(continued)

How Marketing teams use Agile practices

Agile practice	What it means on traditional software projects	How a marketing team would put it into play
Sprint / Iteration	A fixed period of time, usually two to four weeks, in which software development activities occur.	A fixed period of time, approximately four weeks, where your team prepares and launches a monthly campaign or newsletter.
Product backlog	A prioritized list of features (e.g., user stories around new online shopping cart functionality).	A prioritized list of new opportunities that needs to be researched, reviewed and then scheduled out.
Daily stand-up meetings	A daily 15-minute meeting when everyone stands up and discusses what they're working on, their upcoming priorities, and any potential roadblocks that keep them from meeting their commitments.	Short daily meetings that occur around special high-impact projects like campaign launches.
Continuous testing to deliver a working solution	In a software project, the code is automatically tested daily for a high-quality working solution. Traditional software development follows weeks of dedicated testing after the software has been built. Agile teams test daily to ensure bug-free code.	Reviewing content materials while the work is still fresh, and then making edits in real time—rather than waiting for the entire team to review.

An Agile lifecycle for Marketing teams

The lifecycle of an Agile marketing project follows this process:

You start with your marketing campaign and a prioritized list of tasks and action items.

Campaign & tasks

1

Each task goes through a series of drafts until it's considered complete.

2

Drafts

At the end of each draft, reviews take place to receive and incorporate feedback.

3

Campaign reviews

Release

4

When everything is signed off and approved, the campaign is released.

Following the release, the feedback is incorporated to improve campaigns going forward.

Feedback & learnings

5

According to a March 2014 Forrester Research Report, "Leaders are waking up to the fact they must work with shorter planning horizons to take advantage of market opportunities—and that working in silos prevents innovation."

Agile in action

Here's a look at how an Agile process unfolds for a Marketing team.

Let's say your team is working on an email marketing campaign. While project deliverables and milestones are common across the scope of a long-term campaign, Agile principles can be effectively applied to improve the cadence—and communication—of how your marketing team can deliver value to your stakeholders in the business.

Key benefits of adopting an Agile process include:

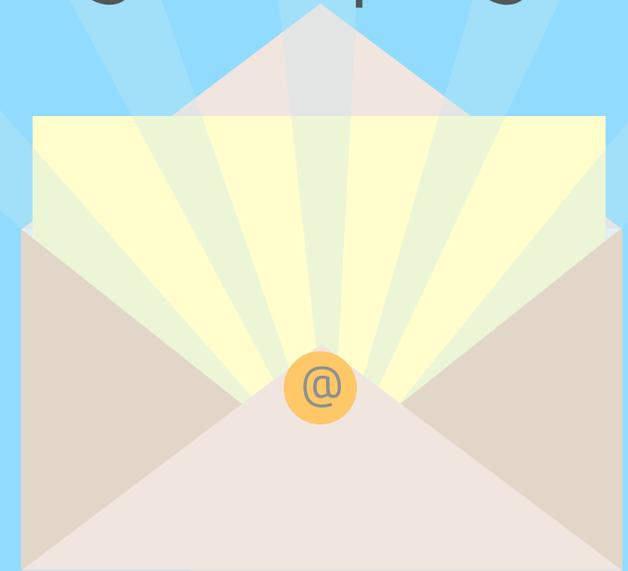**Greater responsiveness to fast-changing market conditions and evolving business strategies**

Improved product based on tests and customer responses

The ability to learn and improve content and campaigns while creating them

More efficient work processes that drive better business results

Agile in action: email marketing campaign

Campaign & tasks			Drafts	Reviews	Release	Feedback
1	**2**	**3**	**4**	**5**	**6**	**7**
Identify everything (and everyone) needed for the campaign (copy, design, audience lists, email dates).	Take all the required tasks, drop them in a project management system, and then assign the various tasks to individual team members.	Since this is a fast-moving project, the team gathers for a daily 15-minute stand-up meeting to share status, upcoming plans and roadblocks.	At the end of the week, the copy and design is reviewed, and the audience list is compiled.	Edits and recommendations are made on the first draft of the email.	Consecutive drafts are completed until sign off.	Keep a copy of this project plan and the email to use as a template for future email campaigns.

Go Agile!

Agile is quickly becoming the preferred way to manage projects in today's business world. Now, many companies—from marketing agencies to giant manufacturing organizations like General Electric—know that a fast and flexible system keeps them competitive and responsive. When teams produce cycles of work that everyone can learn from and refine along the way, businesses transform and prosper.

To become a more Agile and responsive Marketing team, contact us!

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