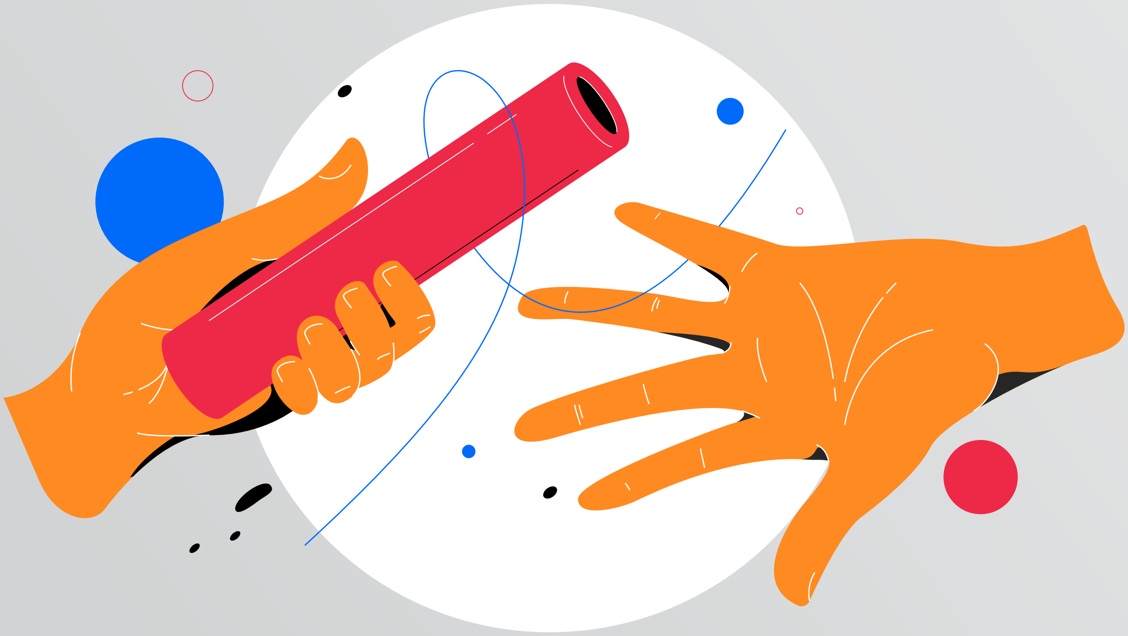
GETTING STARTED WITH

Agile Marketing



CoSchedule

Introduction

The worlds of business and marketing are changing. New technologies are empowering companies to respond to customer demands more quickly and with better data-driven insights than ever before. Those can adapt and execute with speed and precision will enjoy the benefits, while those trapped in an old-school business-as-usual mindset risk becoming irrelevant.

This means marketers must move with the flow of progress too. How can managers make sure their teams are able to keep pace with their competition while remaining flexible enough to adjust to an unpredictable future rather than simply guessing at what might come next?

The answer lies with agile marketing.

With an approach to planning, executing, and measuring projects and campaigns that's based around rapid iteration and data-backed decision-making, marketing departments within organizations of all sizes can work better, faster, and at less cost.

The results speak for themselves: within a five-year span, agile workflows have helped CoSchedule grow into an industry-leading marketing project management software platform, landing at number 153 on the Inc. 500 list in 2018.

Implementing such processes isn't without its challenges. Fortunately though, any company can get started and reap the rewards, transforming even the most stuck-in-the-past teams from cumbersome cost-centers into lean revenue-generating machines. And that is exactly what you'll learn how to achieve by reading this in-depth guide on going agile today.

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CHAPTER 1

How to Get Started With Agile Marketing

And Do Your Best Work

Why Create This Guide?

Marketing teams often struggle to meet deadlines and achieve their goals because of inefficient processes and a lack of proper tools to support better ways of working.

Implementing agile principles and workflows, however, can go a long way toward solving these problems for marketing departments in all kinds of industries. It's no exaggeration nor hollow marketing claim to state that it has been immensely impactful upon CoSchedule's growth.

What Can You Expect to Find Here?

There are numerous ways to apply agile to marketing. Like so many other things in this industry, there are also different philosophies and opinions on the best way it should be approached.

With that said, this guide is not necessarily the end-all, be-all guide on the subject. It's such a broad topic with so many varying approaches that one guide covering every aspect of agile inside and out would be an intimidating challenge (both to create and to read).

Instead, this guide breaks down the basics of what you need to know, and explains how to actually implement it with easy-to-follow step-by-step instruction. It's all informed by what has worked for the marketing team here at CoSchedule too, blending our own approach with some by-the-book explanation. There's some repetition of information too, so if you don't quite catch something the first time, you'll often have an opportunity to hear it again later.

Rather than spend too much time diving deep into minutiae that may not make sense to newcomers, we thought this approach would be more useful. What matters most above all is that you're able to put better processes into place so your team can work more efficiently and effectively to get better results in less time. And that's exactly what we hope you'll gain as a result of reading this guide.

So, What Exactly is Agile Marketing?

In simplest terms, it's a project management framework that borrows the principles of agile software development which enables teams to hit ship dates under budget more consistently.

It achieves this by streamlining team structure, communication, processes, and workflows to maximize efficiency without sacrificing quality.

This results in doing better work at lower cost and with fewer missed deadlines.

It also allows teams to respond to changes in the market and adjust tactics according to what works much more quickly than the typical annual or semi-annual "big campaign" model of advertising.

WHAT IS AGILE MARKETING?

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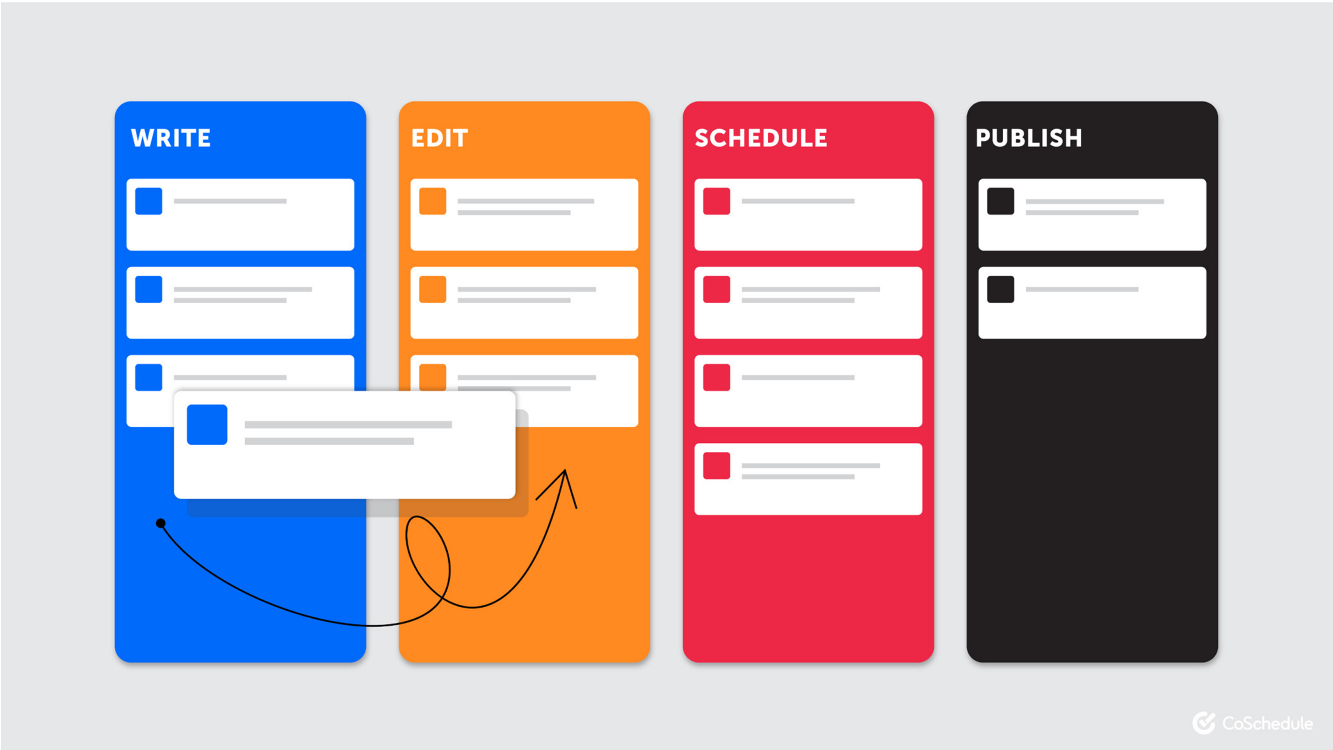
Understanding the History of Agile

As previously mentioned, marketers borrowed agile from software developers and adapted it to their own needs. But, who had this idea first, and how did they initially influence this change?

It might make the most sense to go all the way back to the early to mid-1900s and the Toyota Production System. Constrained by limitations on land use and available resources following the second World War, the company devised a method of manufacturing cars that focused on eliminating waste. It was so successful that other car companies quickly adopted similar processes.

Modern agile processes retain many of the basic principles of the TPS. From working to remove unnecessary steps in production pipelines to visualizing workflows from start to finish, this is where the groundwork was first laid down.

In fact, if you've ever heard of a kanban board (which visualizes workflows moving in phases from left to right), you can thank Taiichi Ohno, the engineer who created the TPS.



From there, the philosophy spread slowly throughout the business world, and took root in software development sometime in the 1990s. In 2001, it started to become more formalized as a philosophy and a practice when a group of developers crafted the Agile Manifesto, a concise summation describing a way of working that was better suited to the quickly shifting needs of a growing technology industry.

Developing an Agile Marketing Manifesto

What works for one line of work might not necessarily apply directly to another. Eventually, smart marketers came to understand that if agile was going to work for them, it needed some modifications to suit their purposes (not because the existing model was flawed, only that is wasn't written with them in mind).

So, in 2012, mind mapping software provider MindJet hosted an event called SprintZero in San Francisco to document a common framework for agile marketers. This led to the creation of the Agile Marketing Manifesto, a seven-point list of values to guide marketers.

The full list reads:

1. Validated learning over opinions and conventions.
2. Customer focused collaboration over silos and hierarchy.
3. Adaptive and iterative campaigns over Big Bang campaigns.
4. The process of customer discovery over static prediction.
5. Flexible vs. rigid planning.
6. Responding to change over following a plan.
7. Many small experiments over a few large bets.

Everything else around the execution of agile marketing stems from this simple list. While it may seem basic, it represents a significant shift in thinking toward marketing, and one that is having a growing impact on how companies build and run marketing teams.

What Are the Real Benefits of Going Agile?

Spend five minutes in the marketing industry and you'll be inundated with more buzz terms and cliches than you're likely to hear almost anywhere else. Hype generation is part of the game, right? Sure, but so is providing actual results based on what actually works.

That's a good point to lead off into why "36.7% of marketers report they have adopted some flavor of agile marketing." It improves project management and gets measurable results. But, beyond statistics and claims of its greatness, **why should you personally care?**

Consider the following points.

- ### Agile Increases Efficiency

  Eliminating unnecessary steps and red tape means teams work faster. This in turn means they execute more projects, which means more opportunity to bring in customers. Instead of spending time on things that don't deliver value, you can focus all of your efforts on the most important tasks at hand.

- ### Agile Increases Innovation

  By emphasizing rapid testing, marketing teams using agile can discover all kinds of insights much more quickly. That means your marketing efforts can be driven by actual data to provide customers the messaging they're actually looking for, rather than making guesses.

  Plus, by moving more quickly, acting on data, and embracing a fail-fast mindset, you can more easily produce innovative ideas that actually get heard, get implemented, and drive results.

- **Agile Delivers More ROI At Less Cost**

  The old way of doing marketing was often slow, and measurement was sometimes difficult to quantify. Now, thanks to agile processes that empower teams to run multiple campaigns at once without reducing effectiveness, plus the advantages of modern analytics, it's easier than ever to produce more measurable return on investment at (potentially) less cost.

- **Agile is Built for Growth**

  Processes that can't scale are processes that can't move you forward. Fortunately, agile is designed with growth in mind. Moreover, it can help teams maintain efficiency even as your team expands over time.

- **Agile Keeps You Focused On Your Customers**

  This approach to marketing keeps teams focused on delivering what customers and audiences want without getting bogged down in unnecessary documentation and meetings.

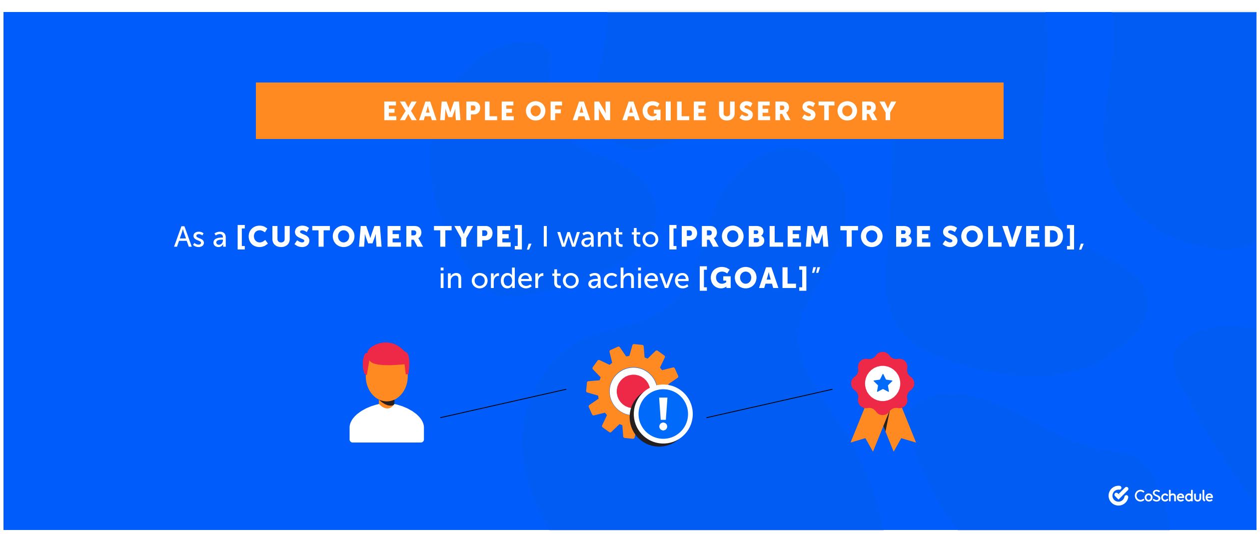
How Does Agile Marketing Work?

So, how exactly do teams achieve all this good stuff? Here's a breakdown behind how it works.

First, teams are comprised of members from different disciplines (breaking down silos). Those teams meet every day when working on projects. Every project that is executed is intended to answer a user story (a short description of what a customer or audience member wants to do, or a problem they're having, that your product can solve).

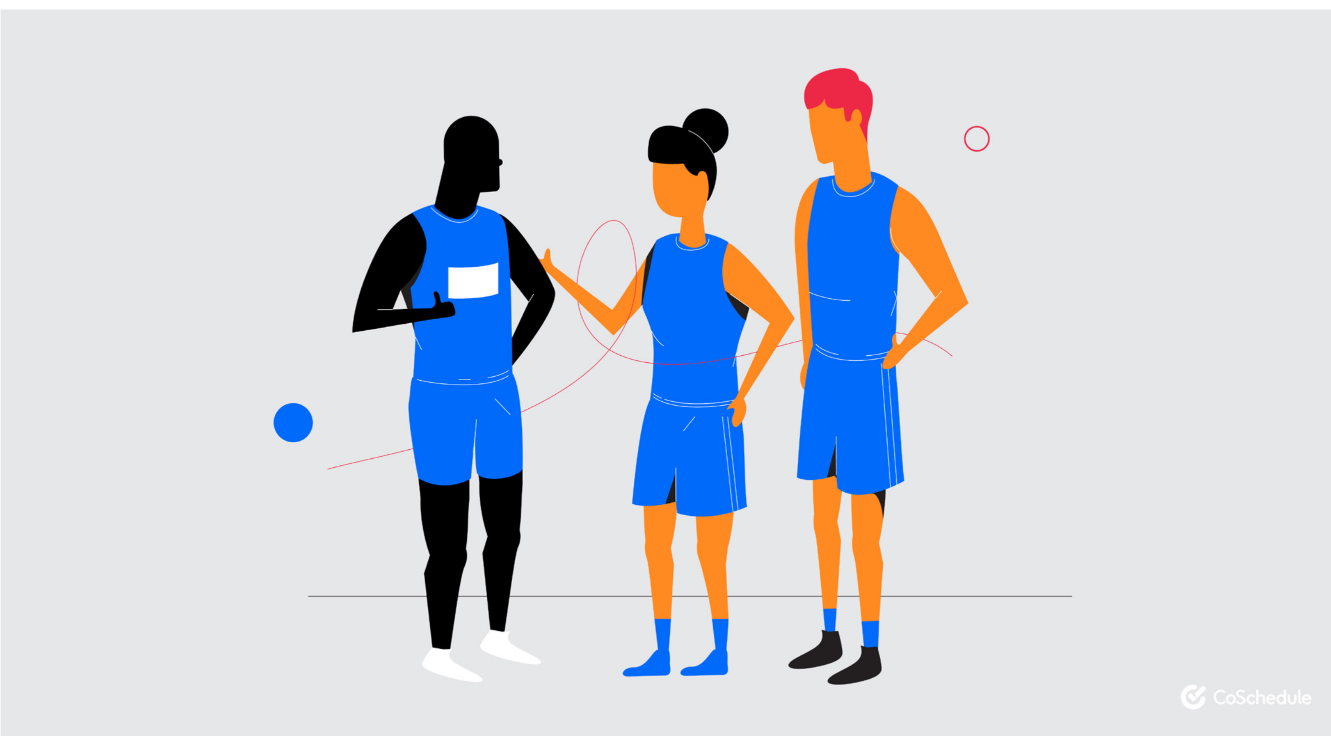
They're written out like this:

"As a [CUSTOMER TYPE], I want to [PROBLEM TO BE SOLVED], in order to achieve [GOAL]".



Next, the team plans out work over short (usually two-week) periods of time called sprints.

At the end of the sprint, the team reviews how things went (and how it can improve).



Feeling lost? Don't worry. All of this stuff will be explored and explained in deeper detail throughout this guide.

Why Doesn't Everyone Do Marketing the Agile Way?

This all sounds great, but it begs the question of why everyone isn't working this way already. It's likely that question can be answered by a few different things, most of which revolve around the fact that disrupting the status quo and influencing change can be difficult.

Sometimes Stakeholders Don't Want to Change

If things have been going good enough for long enough, people can start to get comfortable.

That's understandable. What's comfortable is often what feels safe. And safety feels good, too. You can show up to work, do things the way you've always done before, and then punch out without taxing your brain too much.

But, that line of thinking leads down a path of diminishing returns. The waste of neglected inefficiencies piles up. Frustration mounts and pushes talented employees to leave. Forward-thinking competitors with better ways of working get ahead in the marketplace, while status quo companies slide into the dustbin of history.

Or, at the very least, never achieve the full greatness they're capable of reaching.

The Fear of Failure Holds Teams Back

If you're comfortable, you're liable to get lazy. Implementing new processes takes time and effort, after all. Add the fear of failure on top of that too, and teams can quickly become inflexible.

This applies both to individuals and to companies as a whole. As much as an organization might try to gird against it, it can still manifest itself in self-sabotaging ways that prevent progress. Consider this quote from the Harvard Business Review:

> *"People are quick to blame themselves for failure, and companies hedge against it even if they pay lip service to the noble concept of trial and error."*

The takeaway: even if you give team members room to try things and make mistakes (which is essential for agile to succeed), sometimes people still won't give themselves the room to try and fail and try again if they're worried they'll be blamed when things go wrong.

General Skepticism

Finally, some people are just skeptical. There could be something about agile that doesn't seem applicable to their situation, or on its face, just doesn't appeal to them. In other words, they just might legitimately see things differently than agile evangelists.

Even if you're sold on implementing agile, if a stakeholder (like your boss, or someone in another department that you're dependant on for collaboration or approval) has a differing opinion, you might need to know how to build a case and be persuasive (hopefully, this guide can help you here).

What's Needed to Implement Agile Successfully?

Before you decide to change your team's workflow and approach to project management, there are some basic items you'll need to keep in mind in order to maximize your odds of success.

- **Openness to Change**

  Being a champion for change in your organization can be intimidating. But, it helps to be open to the idea of change itself from the get-go. In short, your odds for success will increase if you can get comfortable with knowing you might not always know what you're doing, and things might not always go to plan at first, but in the long-term your marketing and work-life will improve.

- **Buy-in From Stakeholders**

  If team members, managers, and department heads are expected to execute something new, they will need to be on board with the decision in order to implement it effectively. Otherwise, forcing new processes onto a begrudging team may be a set up for failure in the long run.

- **Tools That Support Agile**

  Whether you use a marker board or software, your project management tool suite needs to be well-suited to supporting agile marketing teams. Ideally, your team will work with the full capabilities of your tools, rather than working against their limitations.

- **Understanding of Agile Processes**

  This last point may be the most obvious. But, it's worth mentioning because while many companies implement small pieces of an agile methodology, not all necessary understand exactly why they work the way they do, nor do they enjoy its full benefits.

CHAPTER 2

What is the Agile Scrum Framework

And How Does It Work For Marketers?

Marketing departments are often chaotic places where keeping organized, communicating clearly, and hitting deadlines sometimes feel like pipe dreams. Last-minute projects derail priorities, meetings that should have been emails (or even just a Slack message) take you off task, and late nights at the office are all part and parcel with the job.

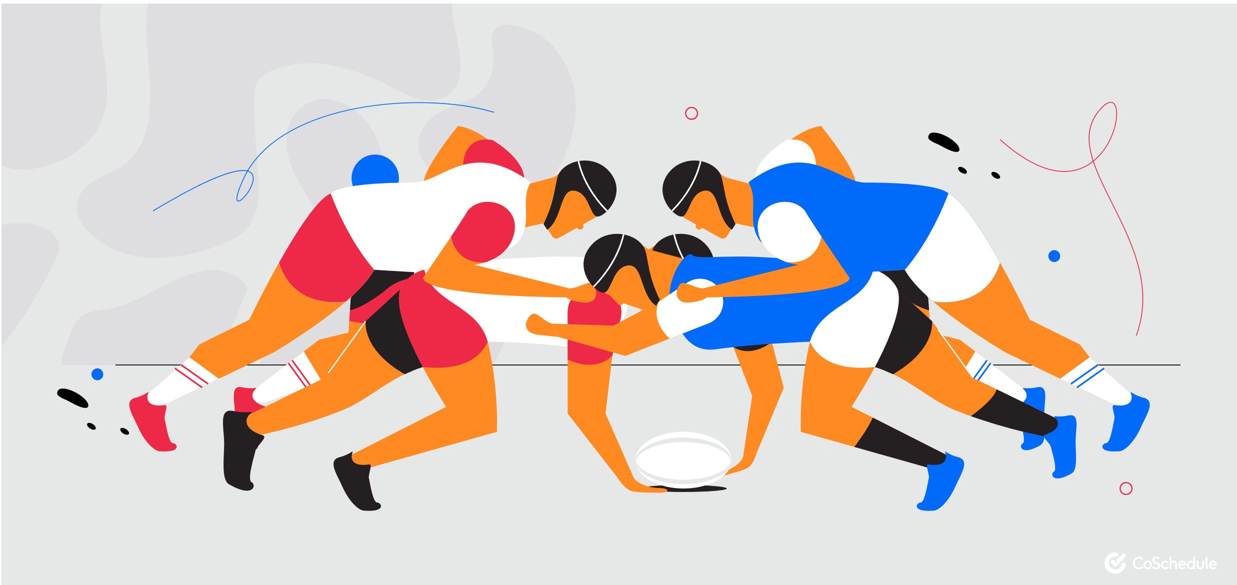
It all adds up to project delays and wasted money for often substandard work. Those three things together do not add up to a productive workplace or a satisfying career, either.

Marketers aren't the first folks on the planet to face these issues though. Nor were they the first to devise a better way of managing projects and shipping work on time. In fact, one of the best solutions to these problems (and more) has its roots in software development (and before that, auto manufacturing).

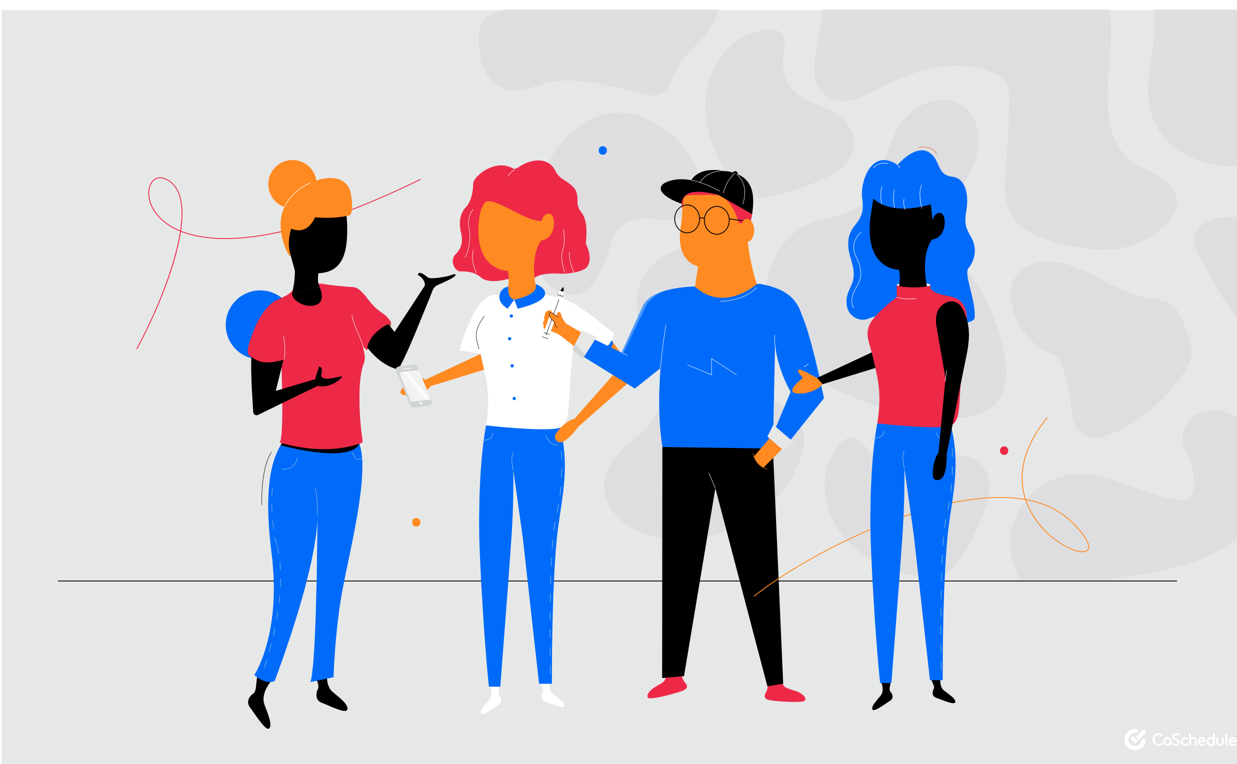
It's called scrum, and this chapter is all about how it works

What is the Scrum Framework?

If you're unfamiliar with the context, then hearing the word "scrum" might make you think of something like this:



The kind of scrum this guide is talking about though looks more like this:



The less athletic of those amongst us can breathe a sigh of relief.

Getting down to business, Scrum is an agile framework for managing projects from start to finish. It's based around the values of self-organizing teams iterating rapidly on collaborative plans. In short, it's intended to remove as much waste and red tape from workflows as possible, so everyone's effort can be focused on doing the most important task at each step of a process.

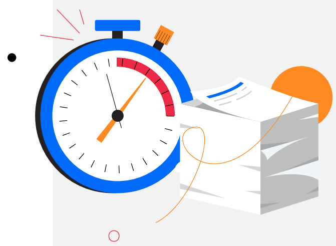
This video from the Scrum Company explains how it works (for all different applications):

Here is a visual breakdown of how scrum works as well:

HOW DOES

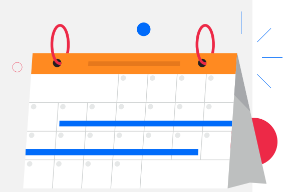
Scrum Work For Marketing Teams?

Instead of having team members spread out across separate silos, a scrum-based marketing team includes cross-functional team members



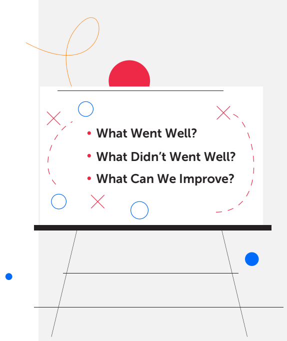
The team plans out projects it wants to execute in what's called a sprint backlog. This is a list of projects that need to be completed and their due dates.

Now, a sprint is a short (generally two week-long) work cycle to complete a project, or a phase of a project.



Once the team starts work on a project, they collaborate through each step, from In Progress, to Review, to Finished.

Each day throughout the process, they will have daily scrum meetings (or daily standups) to discuss what they did yesterday, what they'll do today, and what's blocking their work.



Once the project is complete, they'll hold a sprint retrospective. This is a meeting to reflect on what went well, what didn't go well, and what could be improved.

Who Came Up With All This Stuff, Anyway?

There's a little bit of debate around who exactly devised the scrum framework and who coined the term "scrum" itself.

However, it's commonly accepted that it first appeared in the Harvard Business Review in a 1986 article titled "The New New Product Development Game" by Ikujiro Nonaka and Hirotaka Takeuchi. It was later documented in deeper detail by Jeff McKenna, Jeff Sutherland, and John Scumniotales.

Others suggest Mike Beedle and Ken Schwaber should be credited as its inventors, though according to Techwell, "Jeff Sutherland invented scrum and later introduced it to Ken Schwaber."

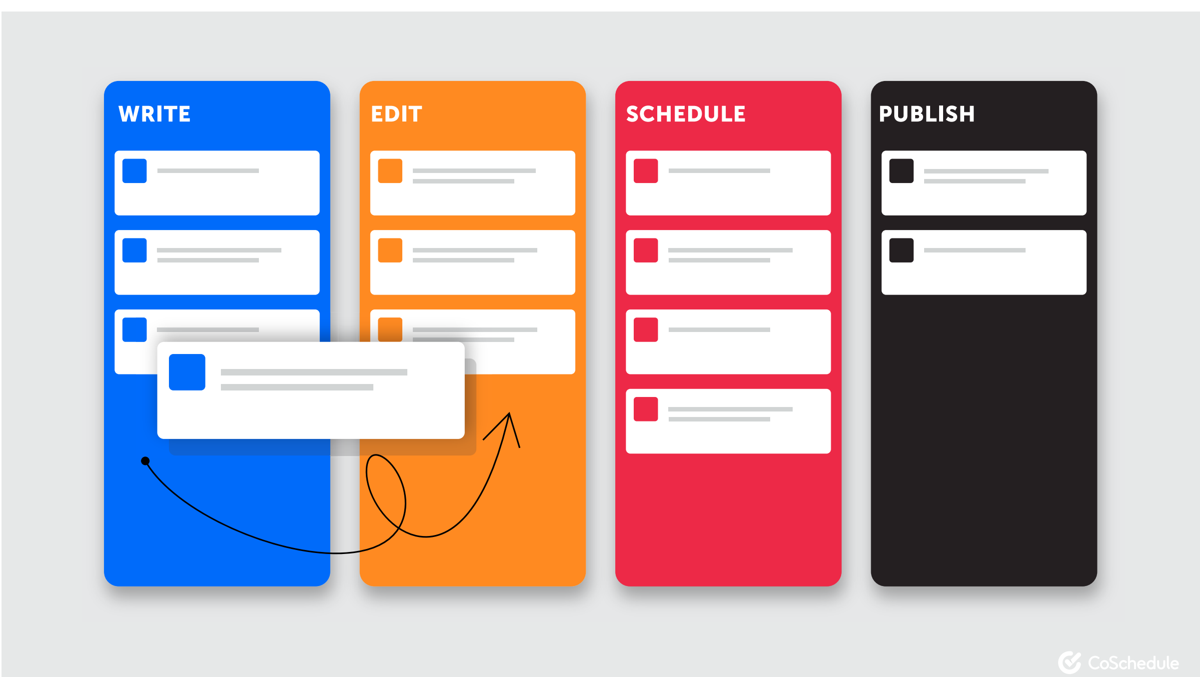
What matters most is that several smart people devised and refined the framework to develop a better way of getting products built and shipped. For marketers, rather than thinking about products or software, we instead focus on projects and campaigns.

Scrumban: One Variation on Scrum

Scrum doesn't necessarily need to be executed just one way, either. In fact, there are several different variations out there, and it's adaptable to the needs of the organization putting it into place.

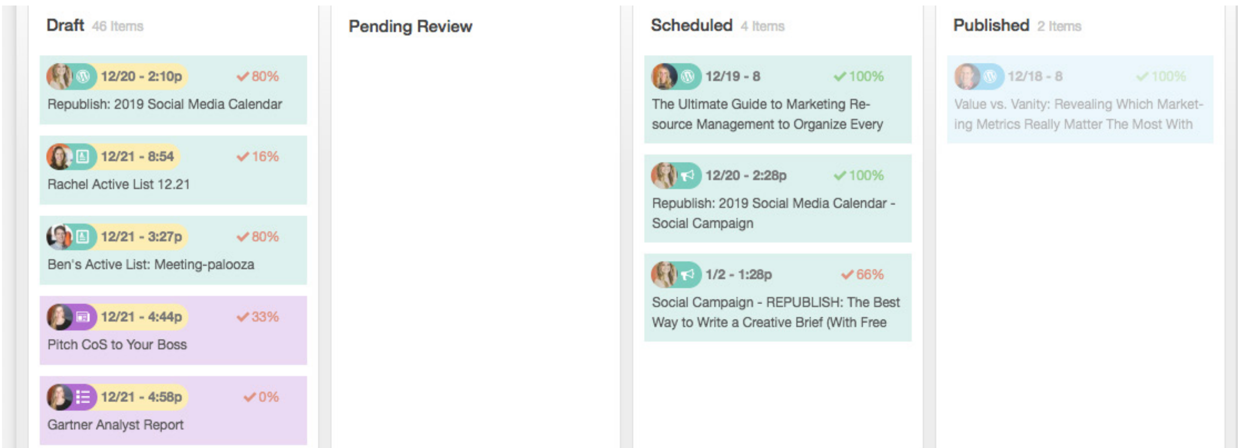
One such variation is called scrumban, which is a combination of scrum and kanban. It brings together the structural elements of scrum with the visual components of kanban.

In this process, scrum is combined with a kanban board that helps teams to visualize project progress:



The process described in this guide is closer to scrumban than a pure scrum framework. This is not to suggest that one approach is better than another, but it is one that can work well for marketing teams.

In addition, CoSchedule supports kanban-based workflows with Kanban Project Dashboard. This makes it easy for teams to manage projects and visualize workflows from start to finish:



Grab the Official and Freely Available Scrum Handbook

For a more in-depth exploration of scrum and its application, it's worth downloading the official guide.

You can read the entire thing online or download a PDF (in over 30 languages, no less). There may be more information there than you need to get started with your marketing team, but it remains worthwhile reading.

The Scrum Terms and Definitions You'll Need to Know

This guide has already thrown a few terms around that you might not have known before. So, before moving much deeper into the world of agile, it'd be helpful to explain some basic terminology and methodologies you'll be likely to encounter. It can seem complicated at first, but the general concepts behind it are simple enough to easily understand the basics.

Here are some basic definitions (worded to make the most sense in a marketing context):

BASIC

Agile Marketing Scrum Definitions

PRODUCT OWNER

The primary decision-maker on a scrum team.

SCRUM MASTER

Leads meetings and standups, removes roadblocks, and oversees the scrum team.

USER STORY

A brief explanation of the who, what, and why behind a project.

TASKS

An item that needs to be completed by a scrum team member.

BACKLOG

A repository of project ideas that may be executed in the future.

BLOCKERS

Anything that's preventing a team member from completing their work.

MINIMUM VIABLE PRODUCT (MVP)

A bare-level project intended to show proof of concept.

KANBAN

A visual framework for tracking steps in a process that uses columns and status indicators moving from left (beginning) to right (completion).

RETROSPECTIVES

A meeting to reflect on how a sprint went, what was learned, and what could be improved upon in the future.

STANDUP

A daily morning meeting where the team shares what they did yesterday, what they'll do today, and anything that's preventing them from moving forward.

SPRINT

A short period of time during which a project will be completed (generally a week to a month).

How Are Scrum Teams Organized?

Scrum is all about getting teams to work well together to get projects done efficiently and on time. In order to achieve this goal, they need to be structured in a way that facilitates proper implementation.

So, how should they be organized and optimized to work at their best? They should start by including three different roles:

- **The Product Owner**

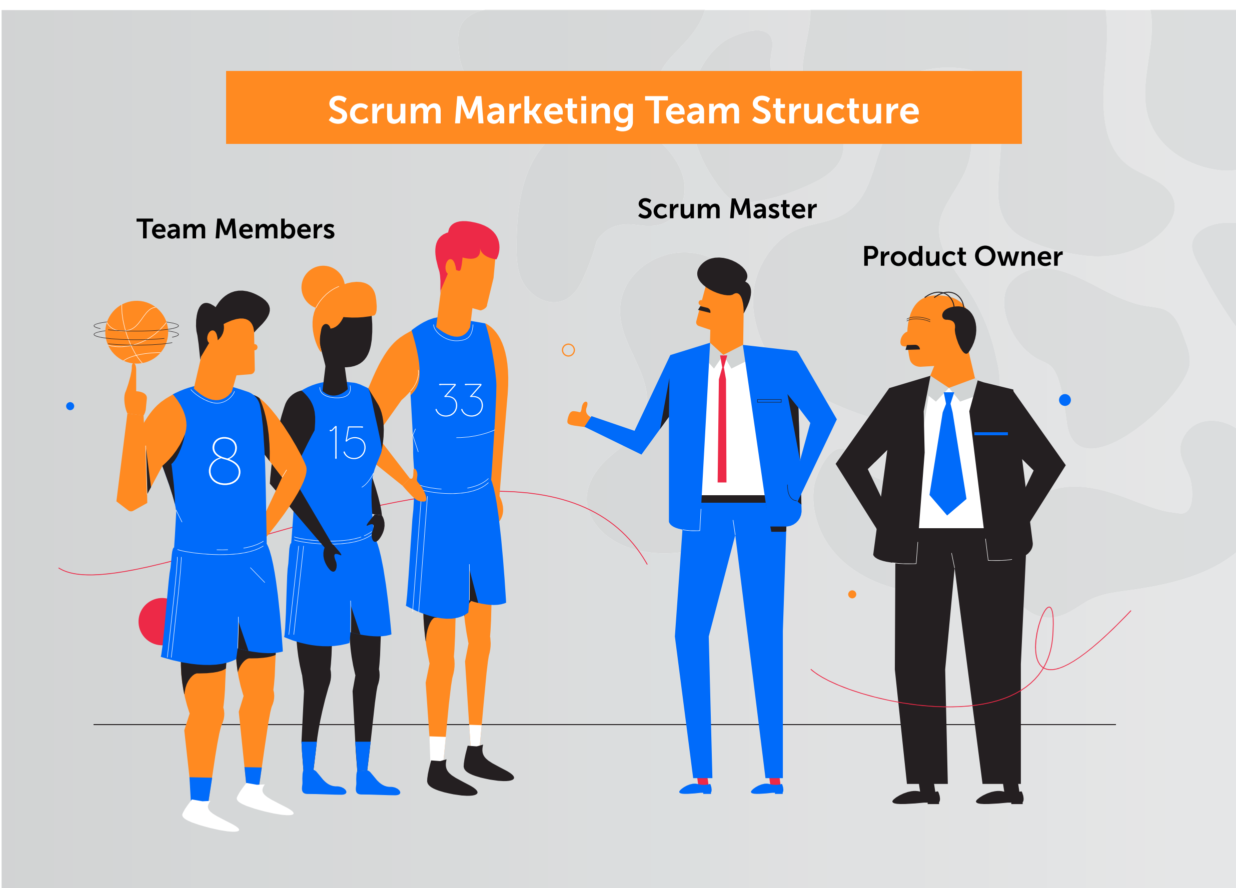
  The Product Owner establishes what's needed for completion. As stated before, this is the central decision-maker on the team.

- **The Scrum Master**

  The Scrum Master manages the process day-to-day. This entails removing blockers, running standups and retrospectives, and ensuring the team has what it needs to get its work done.

- **The Team Members**

  Each team member takes care of their own work. Rather than having a boss breathe down their neck, standups and ongoing communication between team members keep everyone in the loop on project status. Transparency ensures everyone knows how work is progressing and can anticipate next steps.



How Does Scrum Work for Agile Marketing Teams?

Now that you understand the general philosophy behind scrum and the verbiage involved, it's time to take a look at how it functions in the real world.

This section will walk through the entire process on a hypothetical marketing project from start to finish. Note that this may not be the exact process every agile marketing team, but this example is based on the actual steps used by the CoSchedule marketing team.

Creating a Project Backlog: Every Project Starts With an Idea

Creative marketing departments are often full of ideas. Tons of ideas. More ideas than you know what to do with.

For marketers at CoSchedule, quarterly project planning begins with a brainstorming meeting (note: this process works with any type of marketing team or projects).

At a high level, this entails talking through ideas (many of which have probably been discussed before in some form, because the team is constantly throwing out ideas) and prioritizing which ones are the most likely to deliver the desired results.

These ideas are stored in a campaign ideas spreadsheet. Traditionally in scrum, this would be called a **"product backlog."** For marketing purposes, however, it may make more sense to call it a "project backlog."

It looks something like this (and you can find a copy of this template in the downloadable ZIP folder included on the website page that hosts this guide):

Tactic	Owner	Goal	Problem	Story	Hypotheses	Measurement	Date Shipped	Date Analyzed	Actual Result	Retro Date	Next Steps	Know	3, To Do List
What is the name of this project?	*Who on the marketing team is driving this?*	*What outcome will this influence?*	*What top problem does this project solve?*	*As a marketer, I want to {test this idea} so that we {solve the top problem}.*	*{This idea} will {boost/reduce} {goal} by {#/%}.*	*Brief process for how you'll understand if this project meets the hypotheses. Build this before executing.*	*The date on which this will ship. Plan when to analyze (brief is better).*	*The date on which you measured the idea against your hypotheses.*	*{This idea} {boosted/reduced} {goal} by {#/%}.*	*What day did you retro? (Include link to retro notes)*	*Choose one of four options: 1) Continue (not enough results or time to know if this worked) 2) Run (the idea met hypotheses and we should keep it going) 3) Test (the idea is close to hitting hypotheses, but we see a "phase 2" as a method to boost more) 4) Stop and revert (the idea didn't work)*	*List the names of team members who would benefit from learning from the outcome of the project (either good or bad). Determine the plan to proactively and intentionally communicate.*	*What changes will you make? Plan as new idea*

Here's what's included in this document:

- **Tactic:** It may be more appropriate to label this "campaign" or "project," but this column is reserved for whatever it is you'll actually do.
- **Owner:** Who on the marketing team is driving this?
- **Goal:** What outcome will this influence?
- **Problem:** What top problem will this tactic, project, or campaign solve that's currently preventing your marketing team from attracting more customers?
- **Story:** "As a marketer, I want to [IDEA] so that we solve [TOP PROBLEM]" (complete this sentence to explain the project).
- **Hypothesis:** "[IDEA] will improve [GOAL] by [PERCENTAGE]."
- **Measurement:** Briefly explain how the campaign, tactic, or project will be measured to prove its impact.

Later, when a project has actually been shipped, the following can be completed:

- **Date Shipped:** The publish or launch date for the project.
- **Date Analyzed:** When were the results of the project measured and analyzed?
- **Actual Result:** What does the data show?
- **Retro Date:** When did the team hold a sprint retrospective on this project?
- **Next Steps:** What will the team do in the future as a result of executing this project?

Once again, it's okay if this doesn't all quite make sense yet. During the initial planning phases, the details for several different ideas will be documented in this spreadsheet. Think of this like a rough scratchpad for outlining the "why" behind the "what" for everything the team will execute.

Planning Sprints and Building Up a Sprint Backlog

Once projects have been identified, prioritized, and selected, it's time to plan them out into sprints.

The nuts and bolts of sprint planning will be explained in a later chapter, but at a high level, it entails determining all the tasks that each team member will be responsible for on each project. It also charts out when each step will be due.

A sprint backlog can be planned out in a number of different ways, including using physical Post-It notes on a wall or whiteboard. They can also be planned out in a spreadsheet or using a project management tool (CoSchedule incorporates the features necessary to do this work).

All a successful sprint backlog needs are the following items:

- **Estimates on how long each step will take.** This can be challenging, so it's often best to overestimate time to build in a buffer against missing deadlines.
- **Placing each step into the correct order.** Know which steps need to be completed, and who needs to complete them, to keep the project moving.
- **Ensuring the entire team has full visibility on upcoming sprints.** Whatever method of building and planning sprints you use, make sure your tool or method can be easily accessed by the entire team.

The nuts and bolts of sprint planning and execution will be covered in a later chapter. For now, this is enough to give you a theoretical idea of how they work.

Daily Standups and Proactive Communication

A standup is a daily morning meeting where the team meets to discuss project progress. Each team member shares the following information:

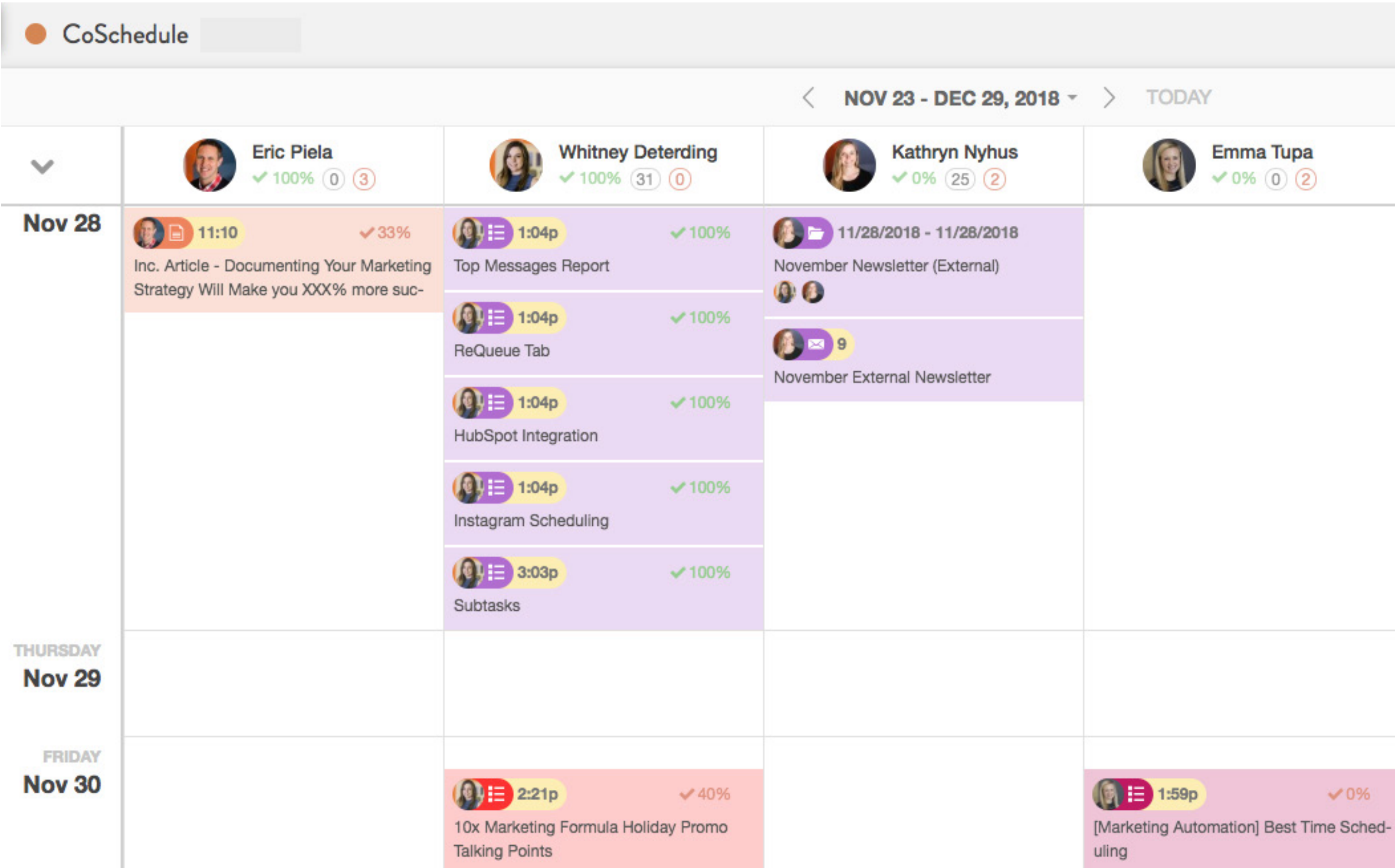
- **What did they do yesterday?** Which concrete actions did they execute?
- **What will they do today?** And does their work accurately follow the sprint?
- **Is there anything stopping them from getting their work done?** And how can those blockers be removed?

These meetings should take 15 minutes or less. By setting time aside to sync on work, teams can ensure a consistent flow of information so no one says, "Oh, I didn't know that was happening," or "Sorry, I didn't know I was supposed to have this done yet."

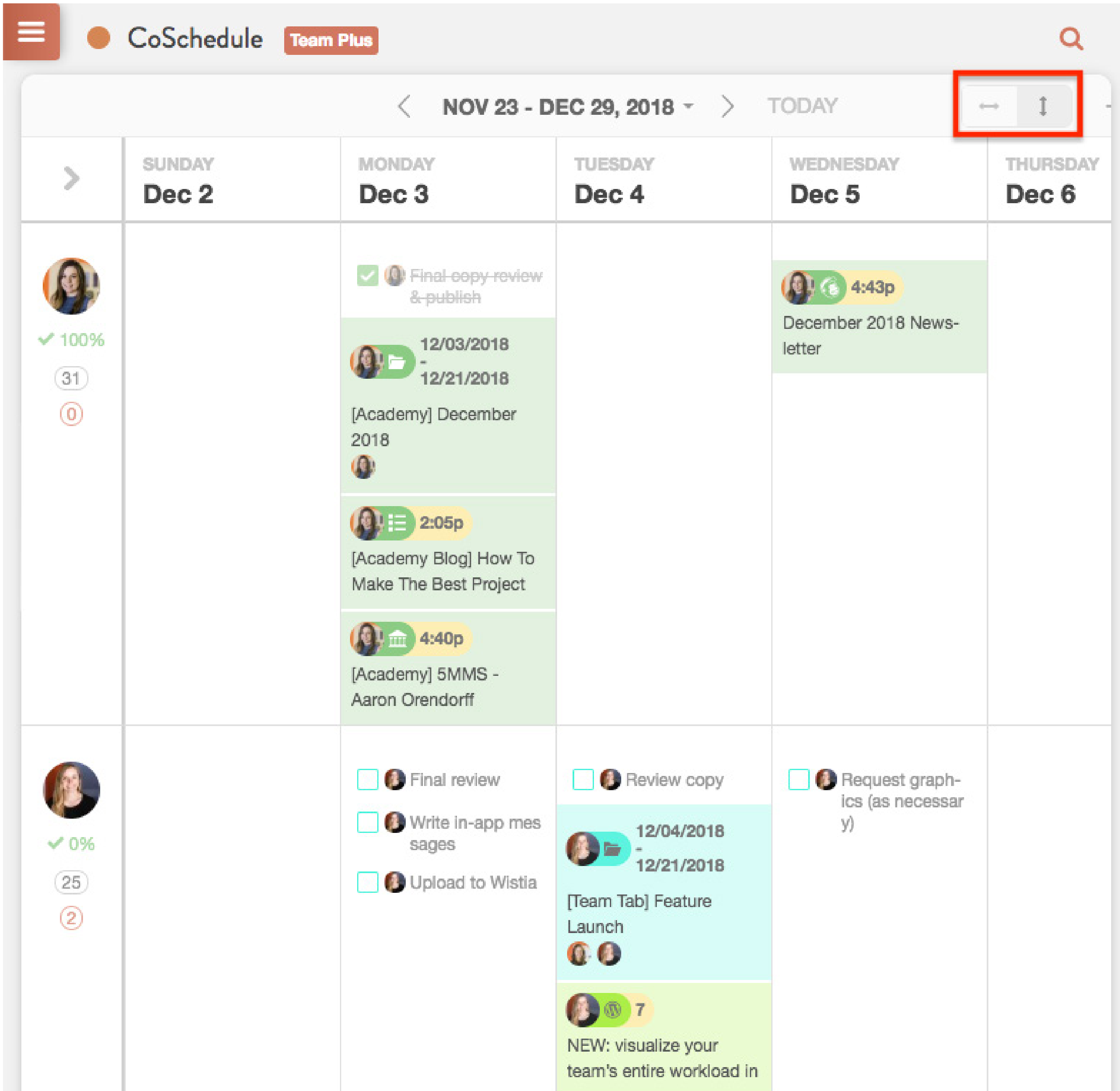
You may have one broadly-focused standup in the morning to discuss all your work, separate standups for each project, or a combination of the two approaches.

CoSchedule helps support teams manage standups with its Team Management Dashboard. It clearly shows all the projects and tasks each member of a marketing team is working on day-to-day, providing total transparency and clarity on who is doing what.

It displays days and tasks in horizontal view:



And in a vertical alignment too. It's highly customizable as well so teams can adjust the way it works to their own needs: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Team Plus
NOV 23 - DEC 29, 2018
TODAY
SUNDAY
Dec 2
MONDAY
Dec 3
TUESDAY
Dec 4
WEDNESDAY
Dec 5
THURSDAY
Dec 6
100%
31
0
~~Final copy review & publish~~
12/03/2018 - 12/21/2018
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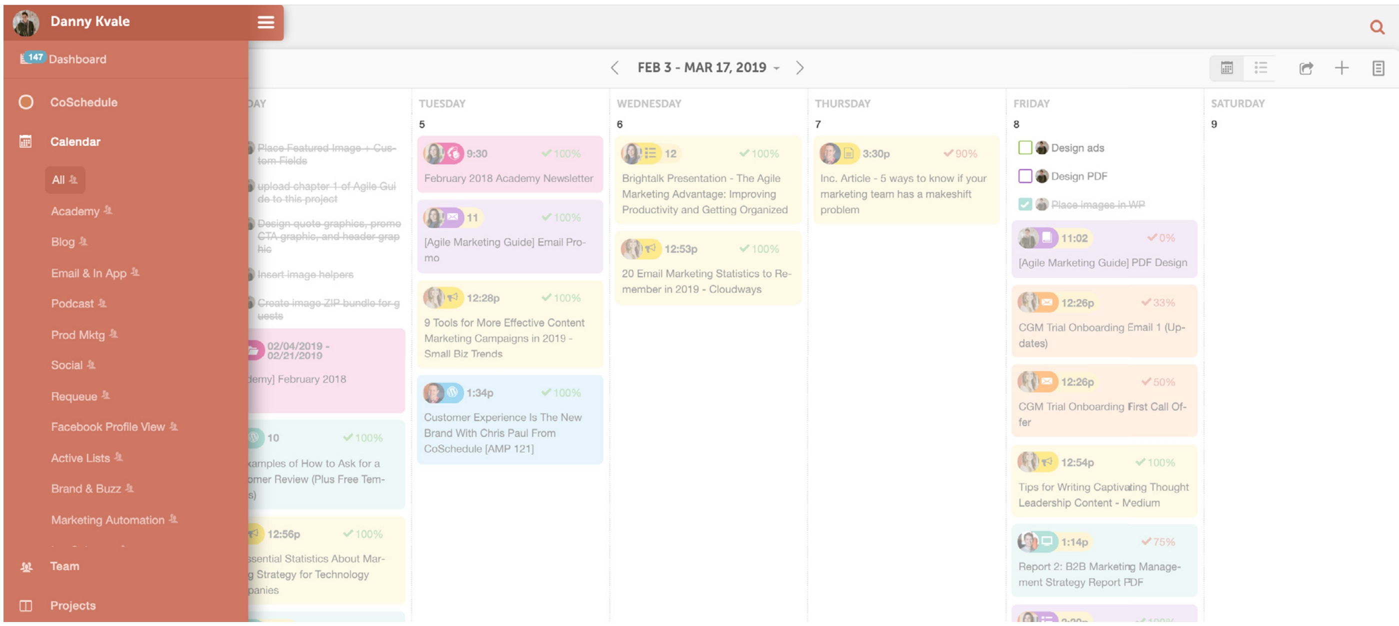
[Academy Blog] How To Make The Best Project
4:40p
[Academy] 5MMS - Aaron Orendorff
4:43p
December 2018 News-letter
0%
25
2
Final review
Write in-app mes sages
Upload to Wistia
Review copy
12/04/2018 - 12/21/2018
[Team Tab] Feature Launch
7
NEW: visualize your team's entire workload in
Request graph-ics (as necessar y)

The Marketing Calendar in CoSchedule offers yet another way to visualize upcoming work. All views can be filtered to include only the team members and work that individual teams may care about most:



Removing Blockers

If a team member has a blocker, it's important to remove that obstacle as quickly as possible. This will help keep the team moving along and prevent the project from going over deadline due to an unforeseen hurdle.

Here are some common blockers you might encounter:

- **An app or tool is down.** The team member can't work because their tools aren't working.
- **Team member doesn't have access to a file or service.** This can often be easily remedied.
- **Another team or team member hasn't completed their steps yet.** In this case, you'll need to determine what the issue is and determine how the work will get done on time.

Ultimately, a blocker can be anything that's preventing the team member from making progress.

Sprint Retrospectives

Once the sprint is complete and the project has been shipped, it's time to look back on how the project performed, and identify lessons learned and areas for improvement.

Like with daily standups, you may choose to run a retrospective for all work at the end of the week, and project-specific retros for each project you execute. This approach ensures you're evaluating each project and campaign, as well as evaluating how things are going with your team as a whole.

It's best to gather the entire team into a room for this meeting. One team member should pull up a document on a computer (ideally on a television or sharing their screen so everyone can see) and note the following:

- **Was the project successful?** In other words, did the sprint meet its goals?
- **What went well?** Celebrate some wins!
- **How could it be improved for next time?** Inevitably, there are bound to some things that didn't go so well too. Think on how you can do better next time around.

That summarizes the bulk of how scrum can be applied to a marketing context.

That's a Wrap

Hopefully, this chapter has provided you with a useful understanding of the agile framework. Plus, you've gotten a quick look at how CoSchedule can help support scrum with marketing teams.

CHAPTER 3

How To Organize

Cross-Functional Marketing Teams

You can't make a bridge out of only rebar. You can't build a house only with nails. A lot of different building materials and the knowledge of how to use them are required.

It's not enough that you've already done the work to assemble a great marketing team. When it comes to your blog, your team is made up of people with different skills and areas of expertise.

Marketing teams are made up of writers, designers, strategists, analysts, project managers, and more. Without a concerted effort harness all of these different skills (and personalities) toward a common goal, you may end up with conflict.

Cross-functional teams have become more and more common in an age where speed has increased. The need to innovate and create at a faster pace means teams with a broad range of skills have to learn to work together. Gone are the days of large specific teams fussing forever on something before passing it off on to the next team and forgetting about it from that point on. In a cross-functional team, the entire ugly process happens in full view and cooperation of disparate team members.

What is a Cross-Functional Team?

This term simply describes a team composed of members with different disciplines and functional roles. For a marketing team, this could mean:

- **Strategists** determine which projects the team should execute.
- **Writers** crafting copy and content for a variety of purposes.
- **Designers** creating images and layouts for that content.
- **Analysts** measuring the results of projects.
- **Project Managers** keeping everything on track.

By bringing together talent with different specialties onto one team to complete a project, marketing departments can avoid silos and groupthink. They achieve this by bringing together everyone who will need to work on the project from start to finish, ensuring everyone's ideas are heard at each step. This differs from one department starting a project, then handing it to another, and another after that, and so forth, without actual collaboration from the beginning.

Agile Teams Are Cross-Functional

Agile asks teams to be self-organizing and collaborative. By their very nature, they need to be cross-functional to support these ideals. Here are some benefits they have to offer for marketers:

- **Reduced conflict:** Instead of splitting up teams into specialists, grouping different specialists together can help avoid conflicts by improving communication between different disciplines (before problems start, stemming from misunderstandings between them around capabilities and requirements).
- **More innovation:** By bringing together different disciplines, team members can offer insights that others might not come up with on their own.
- **Greater efficiency:** Rather than passing tasks on projects between multiple silos, teams can work within themselves to achieve their goals.

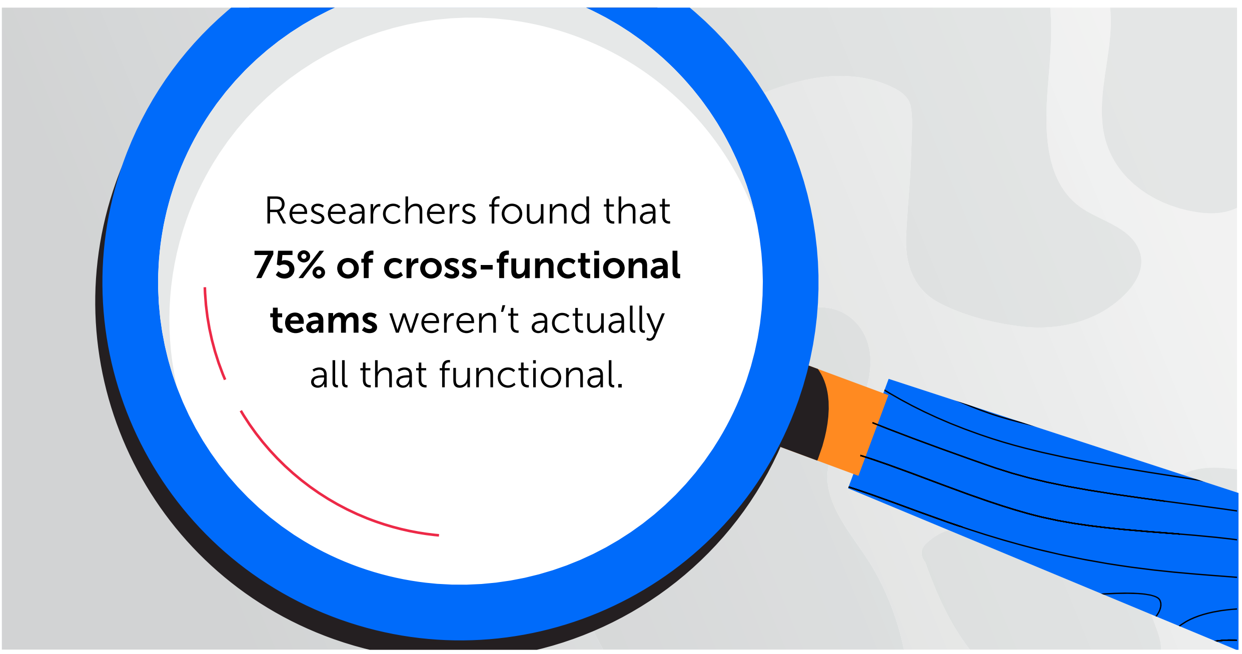
This is great news for marketing teams that want to get more done with less stress while hitting their deadlines. However, there are challenges to building and organizing cross-functional teams effectively. So, it's a good thing you're reading this guide.

When Cross-Functional Teams Go Dysfunctional

In a 2015 study, researchers found out that 75% of cross-functional teams weren't actually all that functional. Lead researcher, Behnam Tabrizi found out that these teams were failing on several fronts:

- They couldn't stay on budget.
- They couldn't stay on schedule.
- They couldn't stick to specifications.
- They couldn't meet customer expectations.

They couldn't stay aligned with a company's goals.



Tabrizi noted that most of these teams were failing because of a specific (and seemingly obvious) reason: An organization lacks a systemic approach. He further explained it in terms of isolated "silos" where different team members (or groups of team members) didn't work well together. The designers didn't work well with the writers, for example, or the editors conflicted with the marketers.

When leadership doesn't lead, when accountability doesn't exist, when communication is foggy, and when goals aren't clear and specific, cross-functional teams can't perform.

Rest assured, even as we use the word leadership throughout this post, it's you as the editor and marketer who is leading your business' content efforts. You're the one who has the power to pull together the team you need, even from multiple departments and walks of life, to grow your business.

Make Your Cross-Functional Team Actually Function

Clearly, you don't want to be a part of that 75% of cross-functional teams running around in circles and never achieving their goals, but how do you avoid it? It seems inevitable that human nature will throw sand in the gears. That is when personality and communication conflicts will arise.

Create Layers From The Top Down

This may sound a little odd in an age where hierarchy in the workplace is gone. You must have leadership at the top that decides on complex decisions affecting these cross-functional team projects.

Tabrizi uses Cisco as an example, describing how they allowed 100 people to attend meetings, but only a core group of leaders could communicate back to them and tell them their functions. And, one level above this leadership was an even smaller team governing over them.

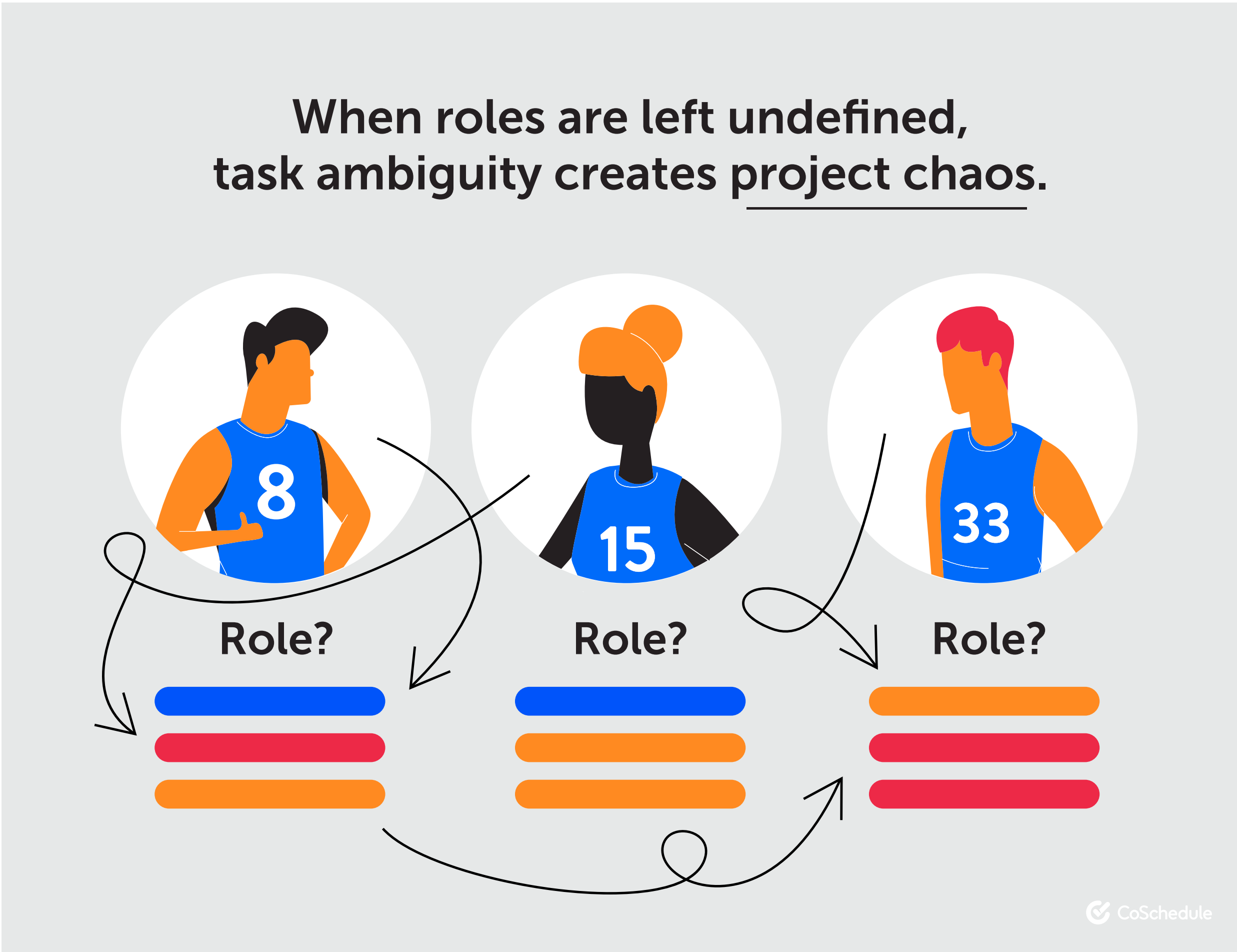
While you probably don't have 120 people on your team, the idea is one that still has value for the small guy: Not everyone dictates to everyone else about what will happen. Only the leaders do. This may cause some strife in some teams, particularly in those where hierarchy is abandoned.

All opinions are valuable. There are times for having brainstorm sessions and problem-solving meetings. But sometimes, the leadership has to lead and the team must follow.

Focus On Roles

When you assembled your team you found people who had specific skills that were needed to get the job done. Wouldn't it be smart to define the roles that those skills and specific people fill?

While you don't want to create a "that's not my job" culture in your cross-functional team, you do want to be specific about what you expect people to do, and deal with any troublesome ambiguity team members might feel.



One of the reasons some cross-functional teams get hung up is because someone is working outside of their role (often trying to be helpful) and that confuses the person who is supposed to do it. They decide it's no longer their job and get in the habit of not doing it. Have meeting times for your team to brainstorm on the projects you all are working on. This will help each person know what role they are to play in finishing a task.

Have meeting times for your team to brainstorm on the projects that you all are working on. This will help each person know what role they are to play in finishing a task.

When you don't clearly define a role, it's difficult to use a task-based system to progress through the project. Your team members must know what is expected of them so they know when their task is complete.

One final note for leadership: If you give a team member a specific role, don't micromanage and tell them how to do it. Let them do their work, or you'll both kill motivation and create a sense of doubt.

Getting Approval And Marking Tasks Complete

Got a system where each team member can get approval to proceed along the path toward completion?

It's funny how we forget about the need for details, such as defining what "done" means. By having a clear definition on what a completed task looks like, you give your team members the ability to make autonomous decisions.

This is a good thing. If they can't do this, they have to run to leadership every step of the way.

For example, do your content marketers have a clear definition of what a post draft should look like? How about what an edited post should contain? And what about the final edits and voice your blog is going for?

As long as you are clear and specific, each team member can then "self-approve" and mark a task as complete. If, for some reason, you have tasks or roles that require leadership approval (e.g. purchases that fit within a budget), make that part of the definition.

✔ TASKS 59%

Before Publish:

- [x] ~~Create contest social promo~~
  ~~Devin Berglund, 28 days before publish~~
- [x] ~~Design contest materials~~
  ~~Ashton Wirrenga, 28 days before publish~~
- [x] ~~Find a keyword~~
  ~~Nathan Ellering, 21 days before publish~~
- [x] ~~Submit post draft~~
  ~~Nathan Ellering, 21 days before publish~~
- [x] ~~Write headlines~~
  ~~Devin Berglund, 13 days before publish~~
- [x] ~~Write download~~
  ~~Devin Berglund, 12 days before publish~~
- [x] ~~Design graphics (and header)~~
  ~~Ashton Wirrenga, 7 days before publish~~
- [x] ~~Help with graphic text~~
  ~~Devin Berglund, 6 days before publish~~
- [x] ~~Design download (and preview)~~
  ~~Ashton Wirrenga, 3 days before publish~~

As with roles, the more specific you get isn't about being restrictive but is instead about providing more freedom. You give team members confidence because they know they are doing what is expected of them. This will also help with personal productivity for the whole team.

Working Efficiently And Quickly With Others

Working efficiently is a tough nut to crack.

We have a lot of posts on this blog about efficiency and productivity, but when you're talking about a team instead of just an individual, it gets complicated.

Individual efficiency hacks are fine, but encourage your team members to use what works. Group efficiency is not based on a hack. It's based on something very simple: *deadlines.*

Deadlines are not a fun concept for creative free spirits.

But deadlines must exist, and deadlines must matter. They must be enforceable and consequently enforced.

While you may not want to set a deadline for every tiny task (depending upon how detailed your tasks are), you are definitely going to want to set deadlines for major milestones. And, if your team habitually misses deadlines, you may, indeed, need to set them for smaller tasks. It really helps to learn how to meet deadlines as a team.

Lack of team efficiency is based on individuals not hitting deadlines. People miss deadlines because they're overwhelmed.

- How many projects or tasks are on a team member's plate?
- Are you burdening them with too many requests?

Maybe they're unable to tell you they can't get it all done. Missing deadlines is an indicator of exactly that.

- **Does your team have the proper tools?** You can hammer nails with a pipe wrench, but it's going to take a long time. Does your team have the tools and resources they need to work quickly?
- **Do they have the ability or expertise?** You can tell a fish to be a bird, but it's not gonna happen. Find a different role for this team member, find a way that they might fit in, or let them go.
- **Are they confused about their role?** Perhaps your team member is doing more than they are supposed to and that's why they are missing deadlines. Revisit your roles and parameters and make sure your team members understand.

Remember that working quickly does not mean giving your team less time. You have to give them enough time to contribute, both in the actual work and in communicating with other team members (and you, the leader).

Leading Your Team

Leading a cross-functional team is difficult. Anyone in a position of leadership should determine whether or not they are using techniques to ensure success.

- ## Defined Parameters

  Did you clearly define the goals, the parameters, the budget, and the resources before your team got started? A cross-functional team is not the setting to be vague and touchy-feely. Be as specific as possible so your team knows the boundaries and the path. Every project (i.e. piece of content) should have defined parameters.

- ## Periodic "Health" Checks

  As a leader, do you have a system or habit in place where you can periodically check the progress of your team? It may be simply reviewing what tasks are completed, or having a mid-stream meeting with the team to see how things are progressing and holding team members accountable. If you don't do these "health checks", you are leaving project progress to chance, assuming every team member is going to perform properly.

- ## Accountability

  Do you have someone who oversees the entire process from start to finish? This isn't about micromanaging and telling people how to do their job, but is simply about making sure that the work is progressing within specified parameters toward goals, budgets, and deadlines.

- ## Proper Focus

  Do you regularly retune your team's focus toward project success? The team leader, while encouraging individual team members in their work, should always make project success the goal, not individual success.

- ## Evaluate And Re-evaluate Projects

  Do you have a process to evaluate and re-evaluate projects? Not every idea is a great one, and it may be your project or content piece that needs to be scrapped instead of throwing good money (and time) after bad ideas. All projects should [align with your big goal](#).

- ## Evaluate And Re-evaluate Parameters

You will have to readjust your parameters as your team changes. Work styles change, expertise changes, abilities change—do you have the ability or a system to keep on top of this? Do you regularly review how well your team is functioning and where the hiccups are coming from?

- ## Keeping Sight Of The Goal

It's easy to lose sight of the bigger picture, particularly when each team member has a small picture to focus on to get their job done. Without a frequent big-picture check, you and your team won't stay on track to the common goal. You'll get caught up in minutiae, disagreements, and so on.

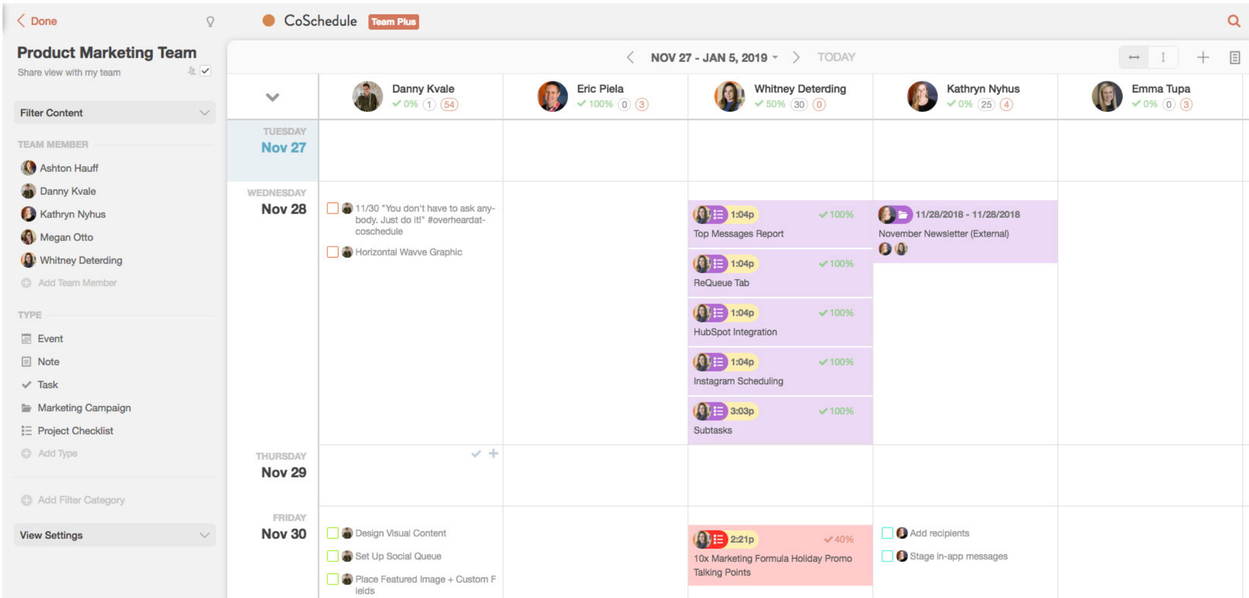
- ## Keep In Mind

It's easy to lose sight of the bigger picture, particularly when each team member has a small picture to focus on to get their job done. Without a frequent big-picture check, you and your team won't stay on track to the common goal. You'll get caught up in minutiae, disagreements, and so on.

- How do you keep sight of the goal for each project or content piece?
- How do you make sure your team remembers the goals?
- Set up periodic and systematic meetings meant for updates and team communication.
- Create posters and signs that define broad company or project goals.
- Email updates to the team.
- Message team members through boards, messages, or through CoSchedule comments.

Regular communication is the key, basically, whichever format works best with your team.

How CoSchedule Can Help Your Cross-Functional Team



One of the reasons I took a task-based approach to discussing cross-functional teams is because we use that approach for project management, and it works well. A task is simply a signifier of what needs to be done in what order. Once it's checked as done, it's a signifier to the next team member to start with their tasks.

- ### Doing The Health Check

  CoSchedule makes it easy for team leaders to view the progress of each piece of content and do those "health checks" without a lot of effort. The tasks for each project are easily accessed on the calendar, clearly showing what has been done and who completed it. Each content piece shows a task measurement bar that reveals, at a glance, progress based on the percentage complete.

- ### Defining Project Parameters

  By setting up a task template with due dates for each task for each member of your cross-functional team, you're setting up parameters both in what needs to be done and when it needs to be done by.

- ### Helping With Focus And Communication

  With CoSchedule, each content piece has its own message board in the form of comments. Leaders and team members can easily communicate there to skip out on endless email forwards.

- ### Controlling Team Access

  By restricting the conversation to only those who are currently involved, team leaders can help out team members and keep them from being overloaded with messages and emails inside of CoSchedule.

Removing a team member who has completed their work on the project spares them from having to see conversations that don't apply to them. It keeps them from getting into the habit of ignoring messages (meaning they'll miss fewer messages intended for them in the future).

- ### Using Notes And Color For Your Project Management System

  Because CoSchedule is built on flexible features, including the ability to add notes and events to the calendar, you're able to create a system that works for your team.

  Perhaps you'll schedule team meetings as an event on your content calendar or maybe the color-coded notes will indicate must-read memos for your entire team. It's up to you to determine how you'll use these flexible tools with your cross-functional team.

How Will You Lead Your Cross-Functional Team?

A healthy cross-functional team is one where diversity in skill is aligned toward the same goal. This requires purposeful leadership devoted to harnessing the power behind that diversity to the same wagon and driving it forward.

With cross-functional teams—clarity, specificity, and definition are all going to work for you, even if that sounds anathema to a culture that loathes hierarchy or restriction.

CHAPTER 4

How to Implement a Simple

Agile Sprint Planning Process For Marketers

Marketers know how difficult it is to organize and execute projects on time. Without agile processes, it can be a mess of trying to sort out what's coming next, while stressing about deadlines and potential roadblocks. If these concerns sound all too real, then odds are your team isn't working as efficiently or effectively as it could be.

If you've been reading through previous chapters of this guide, then you're familiar with sprints. Now, this chapter will go into deeper detail than before on **agile sprint planning** so you can plan projects ahead of time, accurately allocate available resources, and meet project due dates.

What Is Agile Sprint Planning?

Here is a strict definition according to Leading Agile:

> **"Sprint planning is a collaborative effort involving a Scrum Master, who facilitates the meeting, a Product Owner, who clarifies the details of the product backlog items and their respective acceptance criteria, and the Entire Agile Team, who define the work and effort necessary to meet their sprint commitment."**

In layperson's terms, agile sprint planning is a framework that helps your marketing team take larger projects and break them into smaller pieces so you can efficiently complete each portion in a set amount of time. By working in smaller chunks, your team can focus on completing one task at a time as efficiently as possible.

Why Is Sprint Planning an Important Part of Implementing Agile Marketing?

Sprint planning pushes marketing teams to plan projects and campaigns ahead of time while making sure they have the team members and resources available to execute effectively and on time. In short, this process empowers marketing teams to know what they will do, and who will do it, ahead of time.

This prevents vaguely-defined projects from derailing productivity and eliminates fire drills (last minute projects that are suddenly determined to be urgent, instead of being planned in advance). Instead of teams being distracted and overworked, they can become focused and in control of their work.

Planning sprints well also helps marketing managers to maximize their team's time within a 40-hour week. By seeing how much available time team members have from week to week, managers can keep everyone working productively without anyone being under or overworked.

Sprint Planning Terms And Roles You Need to Know

As you learn more about agile marketing and the sprint planning process, here are some terms and roles to keep in mind. This list includes some terms you've seen before, and some that might be new.

- **Burndown Chart**

  A chart that is created during your team's sprint that shows how much work has been done, how much is in progress, and how much still needs to be completed.

- **Definition of Done**

  The standards of performance the pieces of your project must meet to be considered complete.

- **Daily Scrum Meeting**

  Also referred to as "standup meetings." A 15-minute daily meeting between members of a scrum team that reviews work completed the day before, work that will be completed today, and any roadblocks they are running into.

- **Project Backlog**

  A place where all upcoming projects and their tasks and stored away until they are added to a sprint by the scrum master.

- **Project Owner**

  This is the person who is in charge of conceptualizing a project and determining what goals said project needs to meet. They are in charge of coming up with a clear vision to present to the team.

- **Scrum**

  A framework that marketing teams can use to address large complex projects and break them down into smaller pieces to increase productivity and avoid missed deadlines.

- **Scrum Master**

  The person who oversees the entire scrum team and ensures that everyone is productively working. They communicate the capacity and velocity of the scrum team to the project manager to plan effective sprints.

- **Scrum Team**

  A group of five to nine people who are responsible for executing the tasks in a project that have been assigned to them by the scrum master.

- **Sprint**

  A length of time that the scrum team commits to completing a certain amount of work within.

- **Sprint Backlog**

  Tasks and projects that have been moved from the project backlog that a scrum team will commit to completing within a sprint.

- **Sprint Cycle**

  A two-to four-week time frame that a full sprint is completed in.

- **Sprint Planning Meeting**

  A time where the project manager, scrum master, and scrum team get together to assign work for the upcoming sprint.

- **Sprint Review/Retro**

  A time to review what went well in the sprint and what didn't as well as address why work was or was not completed on time.

- **Velocity**

  How quickly a team can complete work within a sprint.

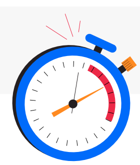
How To Effectively Plan Agile Sprints

Now that you know the language that is used for sprint planning, you can begin to plan your sprints. This traditionally involves 17 different steps to complete a sprint from start to finish.

THE 17 STEP

Agile Sprint Planning Process For Marketing Teams

1. Project owner meets with stakeholders to gather information on the project and set goals.
2. Project owner takes notes and moves tasks into the project backlog.
3. Project owner and scrum master meet to determine what tasks can be done by the team.
4. Scrum master determines the sprint length.
5. Scrum master schedules the sprint planning meeting.
6. Scrum master reviews the team’s velocity.
7. Team discusses capacity for work in a sprint.



8. Team assigns tasks. Tasks are moved from project backlog to sprint backlog.
9. Team adds up time for each task they are assigned and confirms that they can complete the work.
10. Issues, questions, and roadblocks are brought forward and discussed.
11. Scrum master calls for agreement on the selected sprint.
12. Project owner and scrum master confirm the sprint.
13. Daily meetings commence during the length of the sprint.
14. Project owner updates stakeholders on how the project is going.

15. Tasks are added to the sprint as necessary.
16. Sprint finishes and the sprint review/retro takes place. Burndown chart is reviewed at this time.
17. Project owner sets launch date for the project and presents to stakeholders.

CoSchedule

STEP ONE

Project Owner Meets With Stakeholders To Gather Information On A Project And Set Goals

The first step in your sprint planning process is to have your project manager gather information on an upcoming project. This could mean that they meet with a client or stakeholders to find out precisely what goals need to be met for this project. These goals should be recorded in your template:

Name of Project	Goals of Project
Insert the name of your project here.	*Define the goals of your project here.*

STEP TWO

Project Owner Takes Notes And Moves Tasks Into Project Backlog

During the project meeting, the project owner needs to take notes on what the stakeholders hope to accomplish. From there, the project owner will turn those notes and goals into tasks that can be placed into your project backlog. Record those tasks in the project backlog section of your template:

Name of Project	Tasks Needed For This Project
Insert the name of your project here.	*Enter in any tasks that need to be completed for this project.*

STEP THREE

Project Owner And Scrum Master Meet To Determine What Tasks Can Be Done By The Team

After the tasks have been added to the backlog, the project owner and scrum master will review the possible tasks to see what can be done by the team. This would also be the time that the scrum master and project owner would determine who needs to be on the scrum team for this particular project. Add the team members and tasks to your template:

Name of Project	Team Members Needed
Insert the name of your project here.	*Include names of potential team members that will be on the scrum team for this project.*

STEP FOUR

Scrum Master Reviews Team Velocity

After the tasks have been added to the backlog, the project owner and scrum master will review the possible tasks to see what can be done by the team. This would also be the time that the scrum master and project owner would determine who needs to be on the scrum team for this particular project. Add the team members and tasks to your template:

Name of Project	Team Velocity	Total Hours To Be Completed By Team
Insert the name of your project here.	*How much work from the backlog can the team handle in one sprint?*	*Total number of hours that the team will complete by the end of the sprint.*

STEP FIVE

Scrum Master Determines The Sprint Length

After the tasks have been added to the backlog, the project owner and scrum master will review the possible tasks to see what can be done by the team. This would also be the time that the scrum master and project owner would determine who needs to be on the scrum team for this particular project. Add the team members and tasks to your template:

Name of Project	Length of Sprint
Insert the name of your project here.	*How long is the sprint?*

STEP SIX

Scrum Master Schedules Sprint Planning Meeting

After the sprints and tasks have been determined, the scrum master will call a sprint planning meeting. It is standard that every hour of your sprint planning meeting coincides with one week's worth of a sprint. So, a two-week sprint would potentially need a two-hour planning meeting. Of course, that's if you're doing things by the book; for marketers, a better guideline is to spend only the time you need planning, but avoid going over two hours. This is in the interest of working efficiently.

STEP SEVEN

The Scrum Team Discusses Capacity For Work In Sprint

At this point, your team should know the capacity of work that each one of them has. This means that if your content writer only has 32 hours to work in a week, you shouldn't book them for 40 hours worth of work.

STEP EIGHT

The Scrum Team Is Assigned Tasks

At this point, the scrum master should be pulling tasks up from the project backlog and assigning them to team members. Each task should have a time length attached to it that the team member has to complete it within. Once tasks are assigned to team members, they are moved into the sprint backlog. The sprint backlog is the amount of work your team has committed to completing. Record tasks in your template:

Team Member	Tasks Assigned	Length of Time For Each Task
Name of your team member	*Add each task that they will be assigned for a certain sprint.*	*Insert the length of time each team member has to complete the task.*
	You can add additional tasks and combine the cells in column A to indicate additional tasks belong to that team member.	

STEP NINE

Scrum Team Adds Up Time For Tasks They Are Assigned And Confirms Their Work Capacity

At this point, the scrum master should be pulling tasks up from the project backlog and assigning them to team members. Each task should have a time length attached to it that the team member has to complete it within. Once tasks are assigned to team members, they are moved into the sprint backlog. The sprint backlog is the amount of work your team has committed to completing. Record tasks in your template:

Length of Time For Each Task	Total Hours	Hours Worked	Hours Left
Insert the length of time each team member has to complete the task.	*Total hours this team member will work in this sprint.*	*Total hours this team member has worked in this sprint.*	*Hours they have left to work in a sprint.*

STEP TEN

The Scrum Team Brings Issues, Questions, And Roadblocks Forward

During your sprint planning meeting, your team should address any issues questions or roadblocks that occurred in the previous sprint. Your scrum team should discuss and figure out how to avoid the problems in the next sprint. Record and document issues and questions in your template:

Team Member	Links/Additional Info	Tasks Added	Notes/Roadblocks
Name of your team member	*Add any additional information a scrum team member needs to have.*	*If any tasks are added during the sprint to a team member indicate them here.*	

STEP ELEVEN

Scrum Master Calls For Agreement On Selected Sprint

If everyone on the team agrees on how the sprint backlog looks, you can finalize your sprint.

STEP TWELVE

Project Owner And Scrum Master Confirm Sprint

Once the team is satisfied with their workload the project owner and scrum master will confirm the sprint and it will begin.

STEP THIRTEEN

Daily Standup Meetings Commence During Length Of Sprint

After the sprint has begun the scrum team will meet daily at the same time every day and answer the following questions:

- What did you complete yesterday?
- What are you going to complete today?
- What roadblocks that might inhibit progress are you experiencing?

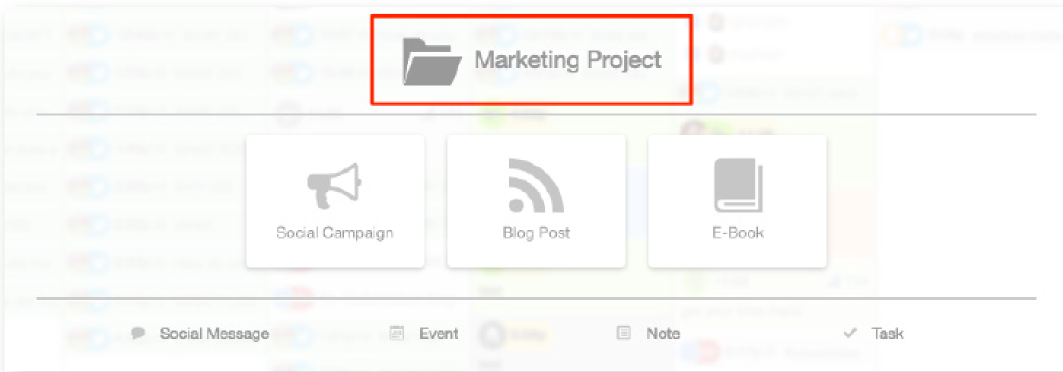
Record roadblocks and notes in your template:

Team Member	Date	Work Completed	Work To Do	Roadblocks
Team member name	*The date of the daily scrum*	*The work they completed yesterday*	*What they plan to do today*	*Road blocks they are experiencing*

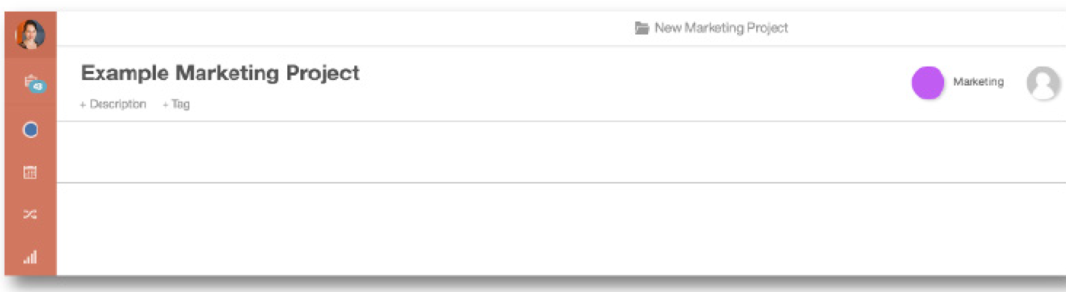
As you move into the execution phase of your sprint, you can use tools like CoSchedule to plan and execute the different parts of your project.

[Marketing Campaigns](#) makes it easy to see a full overview of each of your projects and assign tasks and project pieces to different team members.

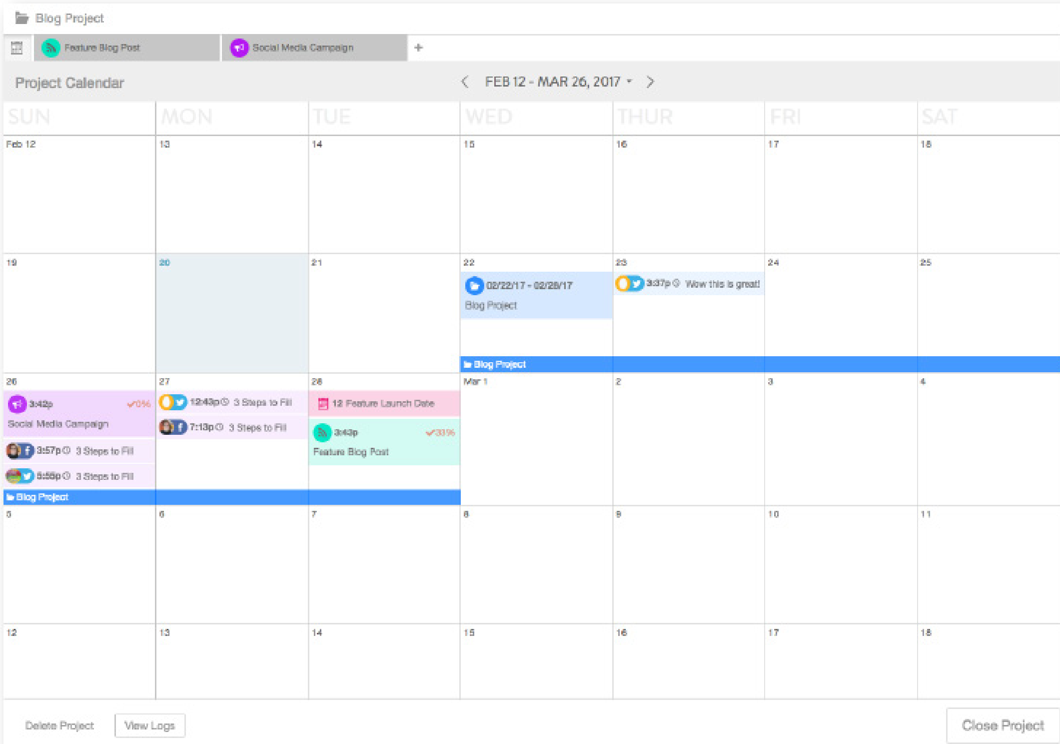
Setting up your Marketing Campaign is a snap. First, select Marketing Campaigns from your content menu:



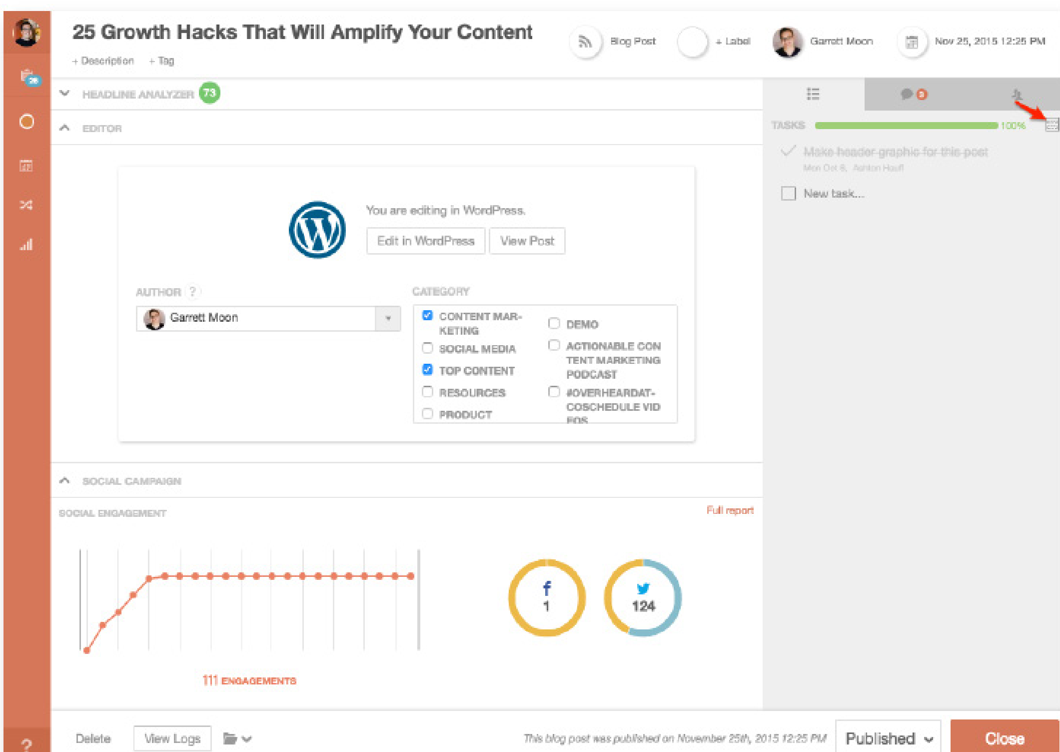
Then title your project and select its start and end date:



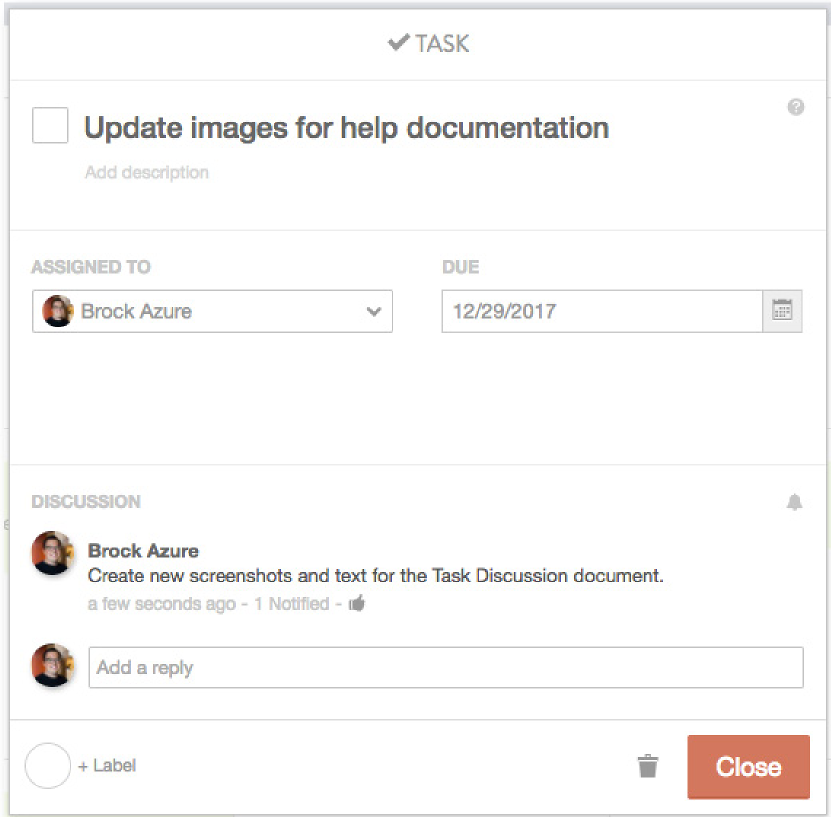
Finally, add in the additional content pieces that will need to be completed for this project and you're ready to go:



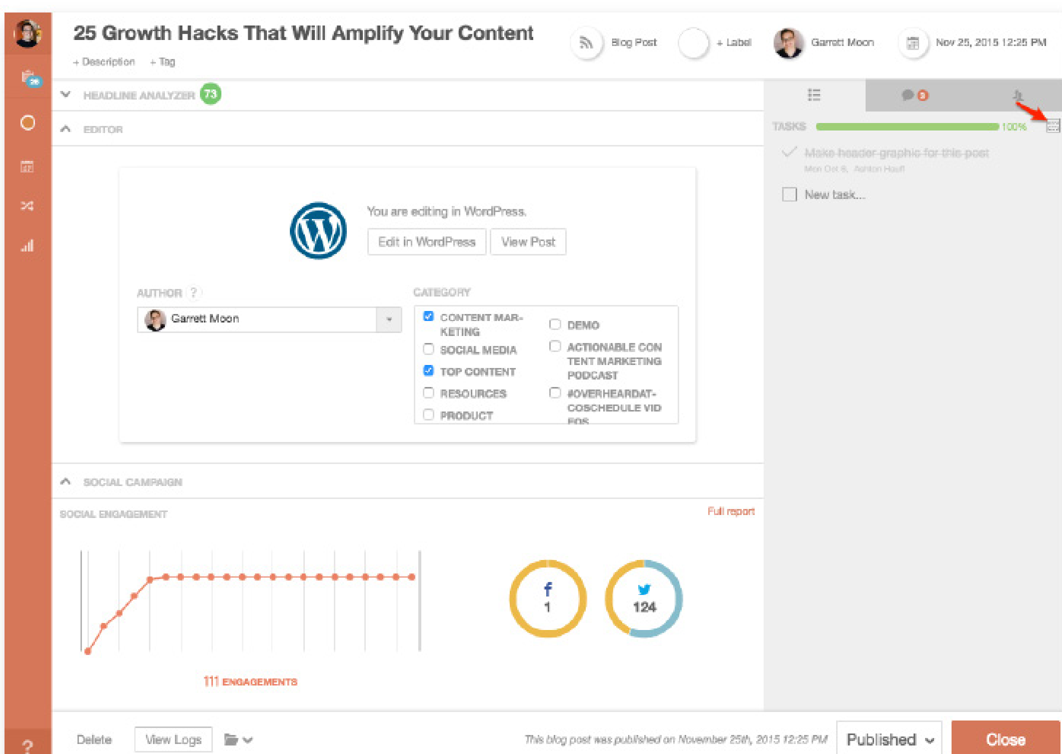
Then, use [Tasks and Task Templates]() to assign team members to work and check in on their progress. Tasks are easy to use, too. First, go into your project and select the task button:



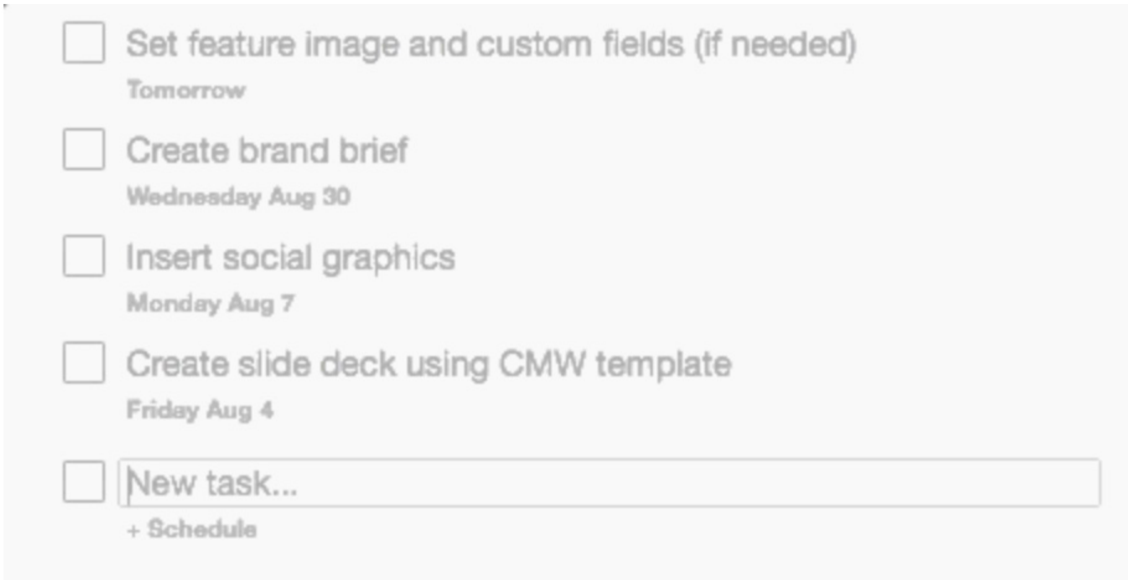
Type in the name of your task, select the person who needs to complete it and assign a due date:



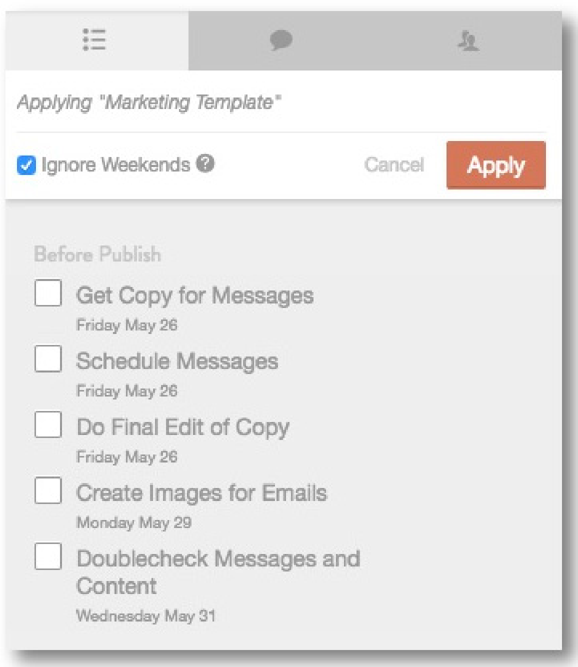
You can also create a series of tasks and turn them into a task template that you can apply to any project. To set them up, select the same task icon.



Then select + New Template. Next, Add in tasks and assignees:



Then once you create a new project just select the Task Template icon, choose your template and click Apply.



Plus, the Team Performance Report in CoSchedule can give you individual and team-wide reports on how your project is progressing, and whether your team is completing their work on time. This is a much more efficient alternative to manually building burndown charts:

STEP FOURTEEN

Project Owner Updates Stakeholders On How Project Is Going

As the sprint progresses, the project owner will update stakeholders on how everything is coming along. To do this, project owners should check sprint planning meeting notes and the daily scrum notes to see what has been completed by team members, what they're working on and what still needs to be done.

If a stakeholder wants to see a certain part of a project halfway through the sprint the project owner should be able to check the sheet to see if that's possible. If it isn't they may need to talk to the scrum master and have them adjust the team's course. This is why having scrum members track and update where they are at with their work is so important.

STEP FIFTEEN

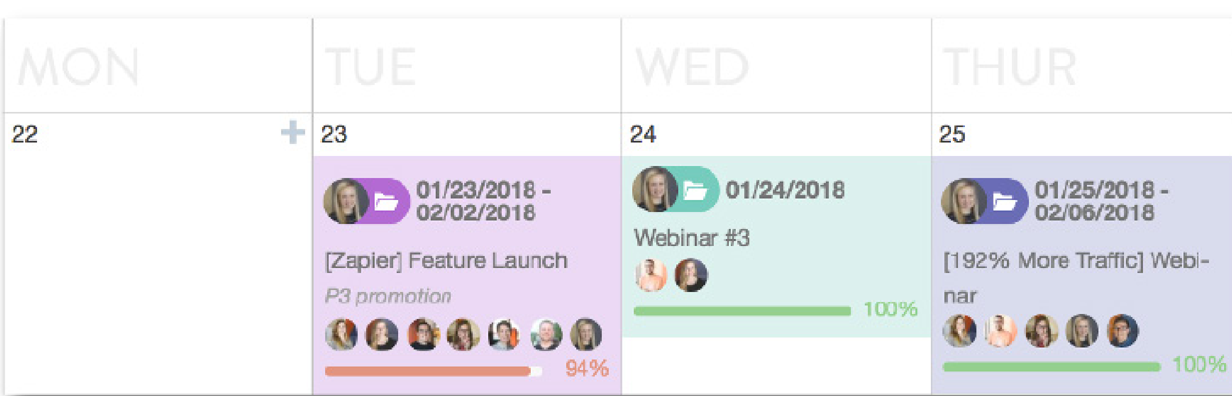
Sprint Finishes And Sprint Review/Retro Takes Place

After your team has completed the sprint, the whole group will gather (including the scrum master and project owner) to review the sprint.

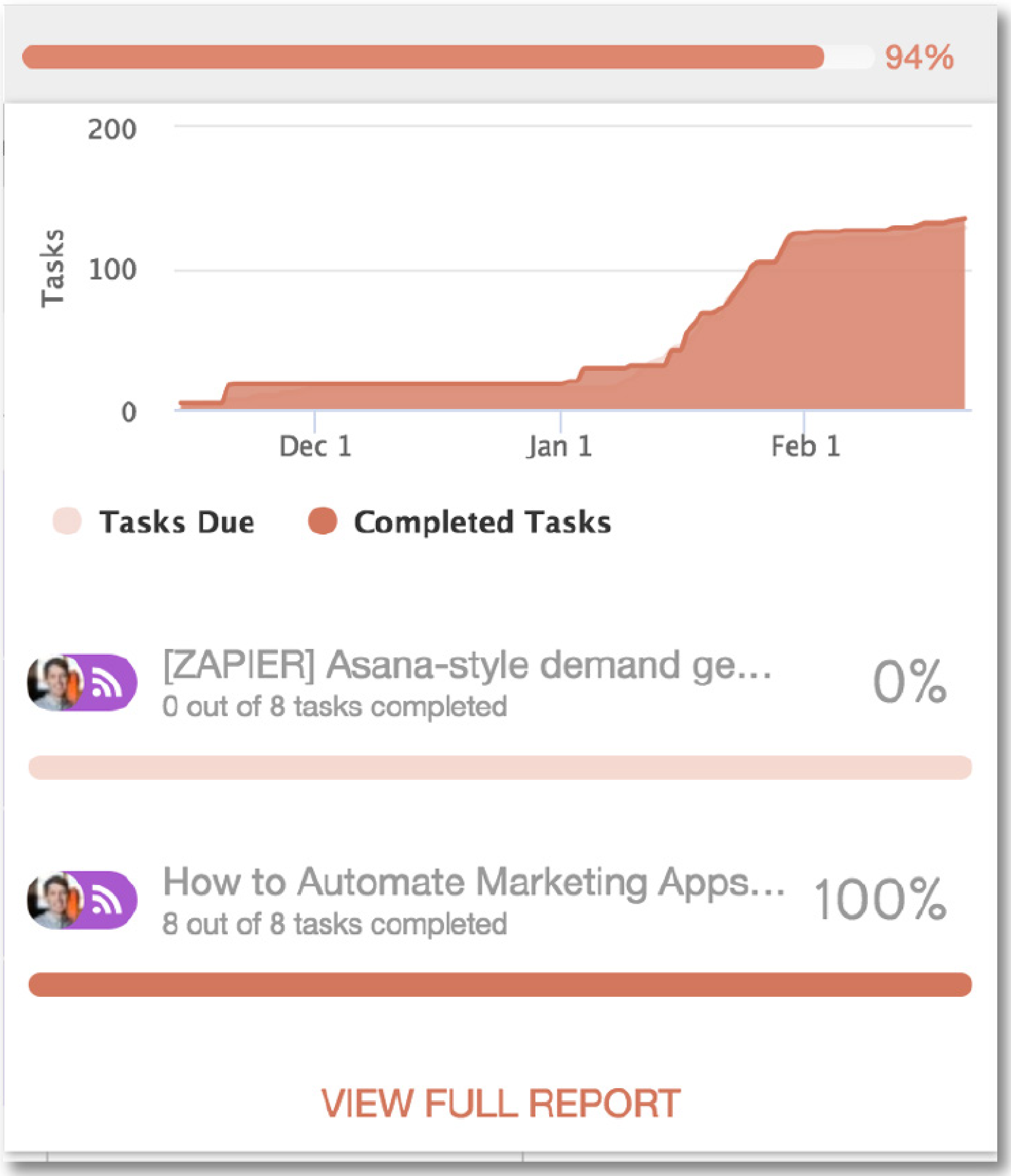
Your team should discuss:

- What went well?
- What didn't go well?
- What could be improved?
- What needs to be stopped to improve the next sprint?
- What needs to be started to improve the next sprint?

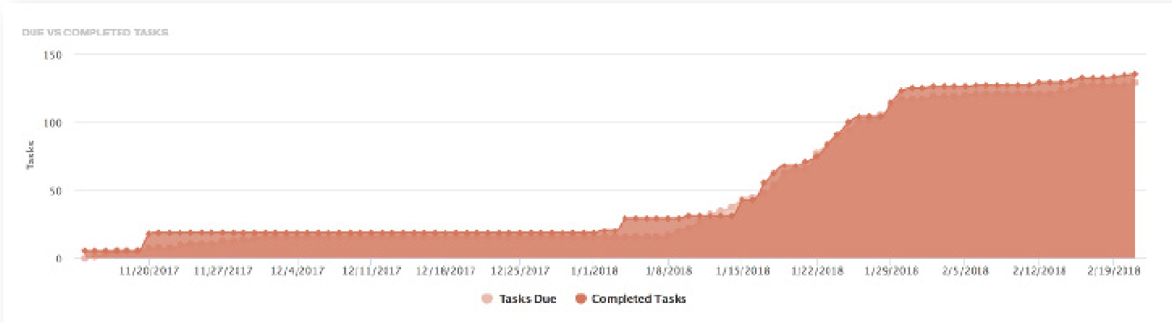
Your team will also observe your burn chart at this point in the process. Your burnchart is a visual representation of how your team got through your sprint workload. In CoSchedule, select your marketing project:



In the upper right-hand corner is your progress bar. Click on See Full Report:



In the full report, you'll see your burndown chart:



Record notes in your template:

Project Title	***Add Title of Project Here/ Sprint #***
Start	*Add things the team should start doing to improve the next sprint.*
Stop	*Add things the team should stop doing to improve the next sprint.*
Best	*Add the best things that happened for this sprint.*
Worst	*Add the worst things that happened in this sprint.*

STEP SIXTEEN

Project Owner Sets Launch Date For Project And Presents To Stakeholders

After the sprint has been completed and deliverables have been approved, the project owner will present the completed work to the stakeholders. This could simply mean shipping the project to your audience or customers, or anything else that comes next after the project is complete.

How CoSchedule Uses Agile Sprint Planning To Get Stuff Done

This process sounds like a lot of work right? And is it all that effective? It is! CoSchedule uses and has been using the scrum method since the company started in 2013.

It's allowed us to work efficiently and keep bringing our customers features they love.

In fact, using this method allowed us to launch four major features in less than six weeks.

CoSchedule uses agile sprint planning and has incorporated it in a way that works for us.

For example, our Demand Generation team uses a sprint backlog to keep track of all of our projects. We even have space for team members to pitch new ideas and plans for us to work on.

From that backlog, we choose ideas that are 10x or allow us to grow our company 10x faster.

(Garrett even wrote a book on the subject if you want to learn more about that process).

From there we use our backlog to fill our week long sprints. These short sprints keep us working as fast and efficiently as we can.

For CoSchedule, using the agile sprint process keeps the entire team moving forward faster.

Try Agile Sprint Planning With Your Marketing Team

Now you know all about agile sprint planning, and you're ready to move onto the next chapter.

CHAPTER 5

How To Run Effective Daily Standup Meetings

With Busy Marketers

Show of hands: who enjoys meetings? Odds are, not many hands would raise in response to that question. There are a number of reasons for this, stemming from their ability to eat time and erode productivity when they aren't run well, or for good reasons.

Fortunately, daily standup meetings aren't like most meetings. Instead of wasting time or being added to your calendar unnecessarily (you know, those meetings that should have been an email), they're short, to the point, and essential for effective teamwork.

What Are Daily Standup Meetings?

Also referred to as "scrum meetings," they are 15-minute syncs that take place every morning (usually right when people get to work, or shortly thereafter; after all, folks might need a moment to get their coffee first). In these meetings, each member of the team discusses:

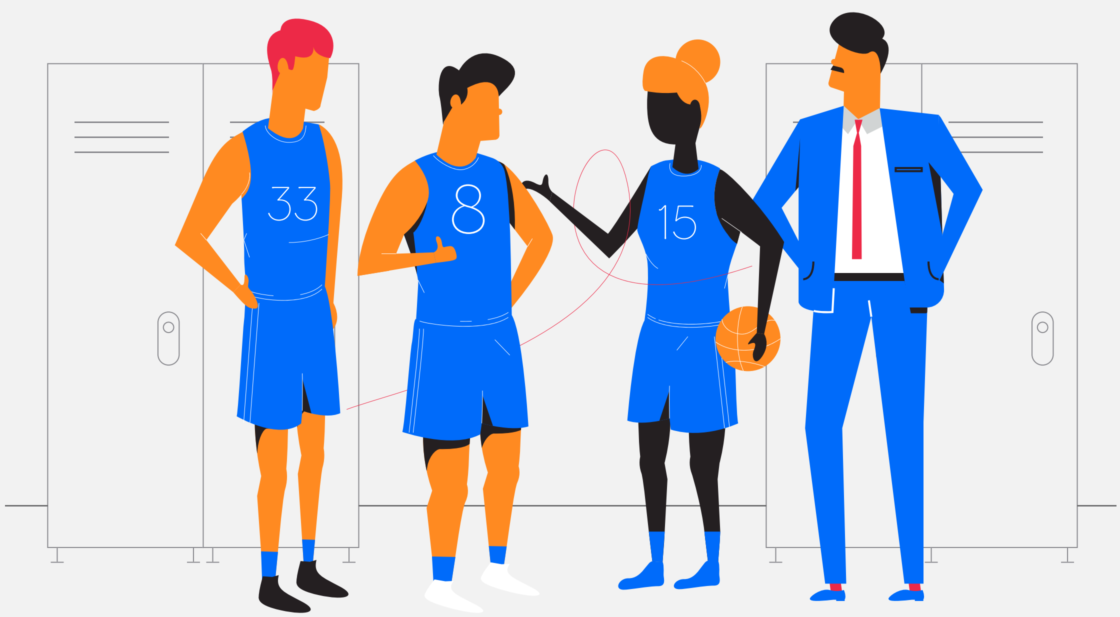
- **What they did yesterday:** Summarize what they worked on and accomplished.
- **What they will do today:** What are their top tasks for the rest of the workday?
- **What potential roadblocks might prevent success:** If there is anything preventing work from getting completed, bring it up so it can get resolved.

These meetings should be facilitated by the scrum master, and ideally, held at the same time and in the same place every morning.

WHAT IS A

Daily Standup Meeting?

Standups are morning meetings where teams discuss what they did yesterday, what they'll do today, and what's preventing them from completing their work.



Why Do Standups Matter?

Daily standup meetings are an important part of the agile framework for marketers. They offer an opportunity each day to keep the team in the loop on what's happening. Without them, you run the risk of having team members jump straight into their work without collaborating effectively.

Some other top reasons for running standups every day include:

- **Keeping teams on the same page.** Self-organizing teams require tight communication to run effectively.

- **Facilitating proactive communication.** By setting time aside at the start of the day to discuss what everyone is working on, you make sure this vital conversation doesn't get ignored.

- **Removing bottlenecks before they become problems.** Stopping problems before they become liabilities for your productivity is important for making agile work.

Best of all, because these meetings are brief by design, they quickly and easily become an unobtrusive part of your day.

How Should Standups Be Run?

Running these meetings isn't difficult nor complicated. However, it's important to ensure they're run properly in order to be effective. This section will outline a basic process for running them well and explain some best practices to follow for marketing applications.

Start With Your Active List

Every team member should maintain a list of projects and tasks they'll be working on for the week. At CoSchedule, this is called an "active list." They can be created in a multitude of ways according to what works best for each team member:

- **Using the Team Management Dashboard in CoSchedule:** This feature automatically lays out everyone's tasks week to week in your project management platform.

- **Organized in Evernote, OneNote, or another note-taking app:** These apps make it easy to store notes and lists for future reference. Evernote also integrates with CoSchedule.

- **In a word-processing doc or plain text file:** Simple and flexible.

If you're interested in using CoSchedule for this, this video explains how Team Management Dashboard works:

This feature offers the benefit of providing the whole team with transparency and clarity around who is working on what. Regardless of which tool or method you choose, the active list should simply include what you're working on.

The Scrum Master Should Facilitate the Meeting

Whoever leads your scrums (usually a marketing manager, team lead, or project manager) should facilitate the meeting each day.

This means alerting the team when the meeting starts (possibly using Slack) and enforcing team member attendance (you can also simply set the expectation that everyone will meet in the same place and time every day without being told).

The scrum master is also responsible for:

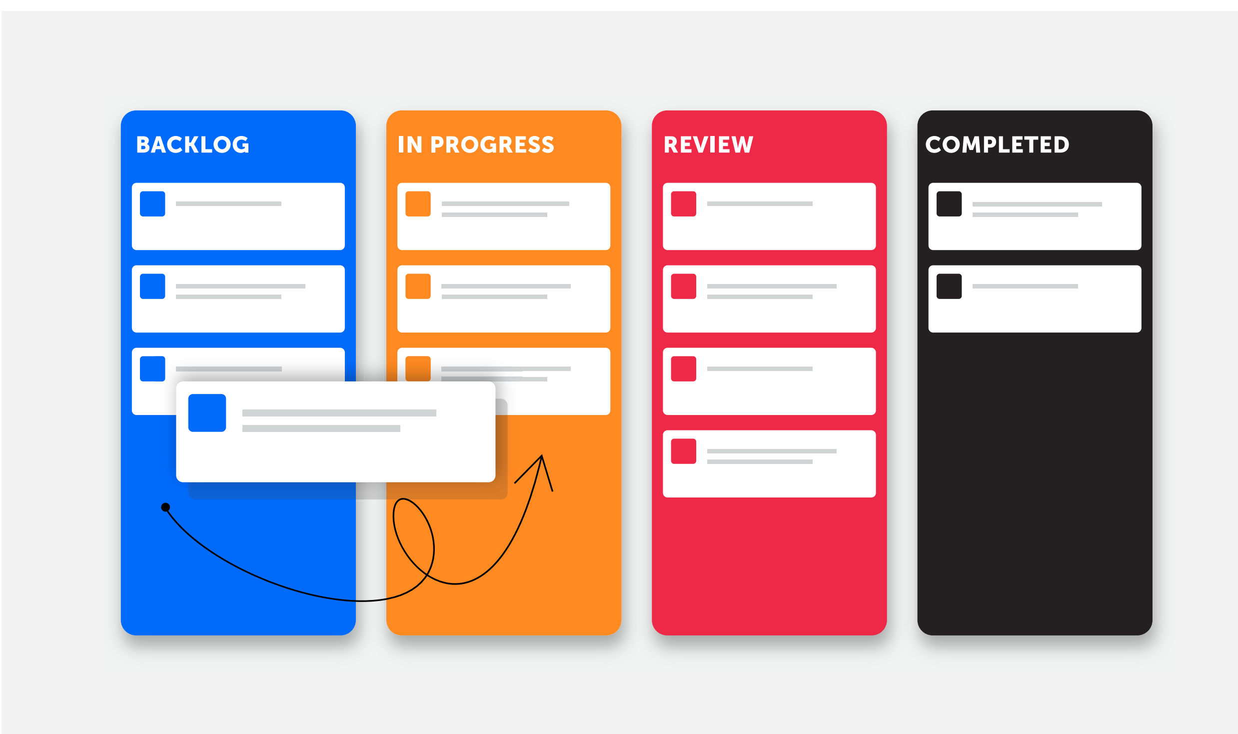
- **Keeping the meeting on track:** Make sure everyone speaks up and goes in turn.
- **Making sure the right projects are being worked on.** And if they're not, redirecting the team toward the correct priority (according to the sprint).
- **Ensuring everyone has what they need to succeed:** If someone needs something to get their work done, help them get access or solve the problem.

Straightforward enough, right?

Determine Whether Standups Will Be In-Person or In-Slack

Most teams host standups in person, literally standing up (this is going to be a quick meeting, so no need to get too comfortable).

If your team is using a kanban board, you might hold daily standups in the same room as your board:



Alternately, you might pull open CoSchedule or another app on a TV in the room. Choose the approach the works best for you.

Traditionally and by-the-book, scrum meetings should be conducted in person. But, what if that doesn't work for you (because you're a remote team, or for another reason), or if you feel like breaking the rules? In that case, there's another option, and it's one that has worked well for the team at CoSchedule: running standups in Slack.

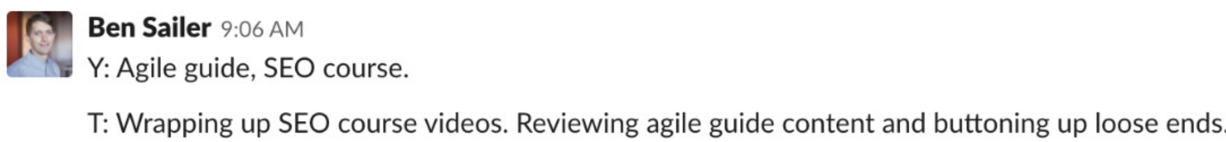
Here is how this works for the CoSchedule team:

- Daily standups (which aren't really standups per se if you're sitting at your computer, but bear with us) are conducted in a specific Slack channel every morning.
- Meetings are held for specific projects as necessary.

Using this method, the scrum master calls scrum in Slack:

Then, everyone contributes what they did yesterday and will do today using the following syntax:

- **Yesterday:** [INSERT TASKS]
- **Today:** [INSERT TASKS]



If a team member has a roadblock, they tag the scrum master in a message. The scrum master is then responsible for addressing the issue by letting the team member know they will work on it, and then walking over to speak directly to the team member to discuss the issue if necessary too.

This is one example of how processes can be tailored to what works best for you. Feel free to experiment and see what your team tends to prefer. But, what matters most may be consistency. Running standups needs to become a daily habit for it to stick.

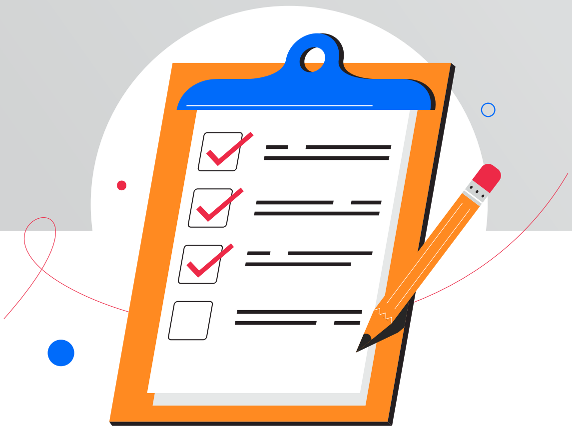
That's It!

The last point of the previous paragraph can't be stressed enough. In order to make this process work, it's important to be disciplined and to not skip days. Once you get into a groove though, you'll start to reap the benefits of meeting with the team each and every day.

CHAPTER 6

How to Implement Agile Marketing Workflows

With Examples



How do your marketing projects and campaigns progress from start to finish right now? If you're like most marketing teams, you may have some informal or partially-documented processes that work okay (if they work at all). Given the fast-paced nature of the average marketing department, this can lead to some chaotic working conditions.

Using agile workflow management can help marketing teams overcome chaos without sacrificing speed. In fact, they make it possible to get even more done in less time than before and without nearly as many headaches. In this chapter, you'll learn exactly how to implement them and make your day-to-day work more productive and enjoyable.

First Off, What Does the Word "Workflow" Mean?

For the purposes of this guide, a workflow is simply a defined set of steps required to complete a project. They can be visualized as a set of phases that move from left to right or top to bottom.

Here is a simple diagram of an agile workflow:

AN EXAMPLE OF AN

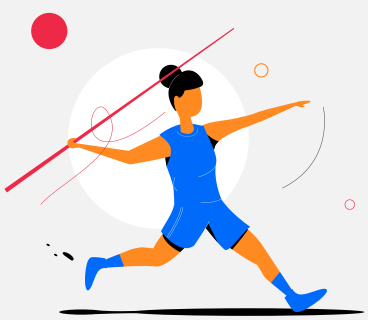
Agile Marketing Workflow

STEP 1
Team identifies a project from the backlog to work on.

STEP 2
The steps for the project are planned out into a sprint.

STEP 3
The team then execute their steps in each stage of the project.

STEP 4
As they work, they'll meet each morning for a daily standup.



STEP 5
At the end of the sprint, the team ships the project.

Why Should Workflows Be Defined?

Agile workflows allow marketing teams to work with greater efficiency by taking large projects and breaking them down into smaller, more manageable chunks. They make it possible to tackle even large-scale projects within reasonable amounts of time while missing fewer deadlines.

They achieve this by giving teams structure and removing ambiguity around how work gets done and who is responsible for what at each stage. They turn chaos into order, and order into productivity.

Building Status-Based Workflows for Every Project

The first step in planning out a workflow is to figure out which phases (or state) the project will need to move through from start to finish. For example, if you were writing copy for a landing page, the phases might look like this:

Writing > Editing > Development > Publish

From the beginning until the end, the project moves through a clear series of stages. One phase has to be completed before the next one can be taken on, and it's clear which order they should go in.

An Example of a Complete Workflow

Go back to the landing page example and break down each stage. Consider every different component that might need to be written:

- Title tag and meta description.
- A headline and subheads.
- The body copy.
- Any calls-to-action and necessary button text.
- At this stage, they may need to write copy to promote the landing page, too (for example, email copy and social media posts).

During the editing step, the next team member will need to make sure all of this content is written. If anything is missing, it'll have to get bounced back (along with any other edits that may have needed to get made). It's important for individual team members to hold themselves accountable to best serve their team by making sure they get their stuff completely done.

From there, the content may need to be handed over to a web developer to build the landing page. In addition, they might build the email too (or a marketer might put it together in their email service provider). They need to know that the content is accurate and includes everything they need to set up the page.

Planning Your Own Workflows

In order to plan out your workflows, start simple and ask, "Ideally, how does this type of project typically flow from start to finish?"

This can be different for different types of projects, too.

Next, define what is required before each phase is considered complete. A stage should be 100% ready to move on before it's considered finished.

Now, you might also need to develop your own terminology for each stage based on the projects you execute. But, they should be different variations that revolve around these basic phases:

Plan > Execute > Review > Launch

To make this more clear and easier for the team to understand, simply change each label to what makes sense in context with the type of project. Here are some further examples:

- **Blog Post:** Write > Edit > Publish
- **Email Campaign:** Write > Review > Develop > Send
- **PPC Campaign:** Write > Review > Adjust Bids > Launch

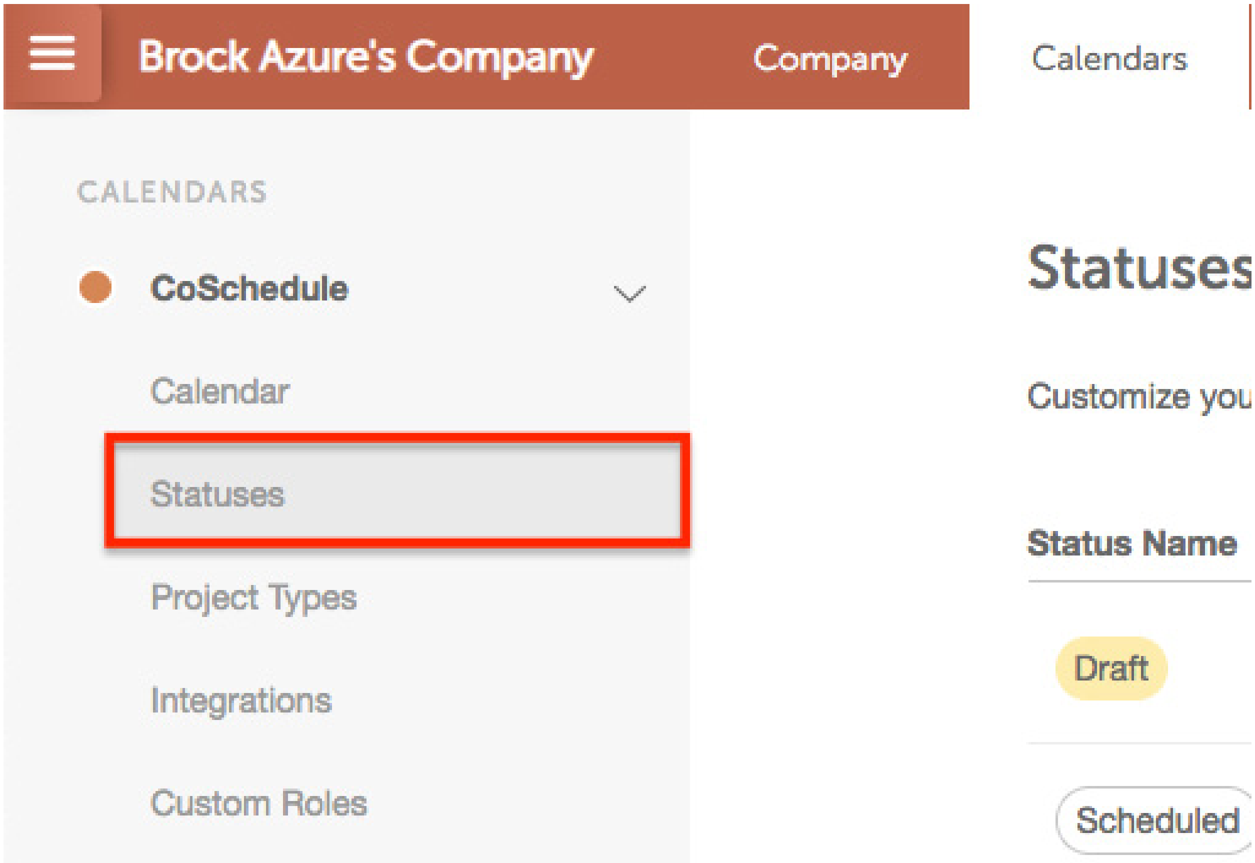
You get the point. Most types of marketing projects can be broken down into execution, review, and ship stages. What changes is simply the verbiage from one project type to the next.

Using Task and Project Management Tools to Plan Workflows

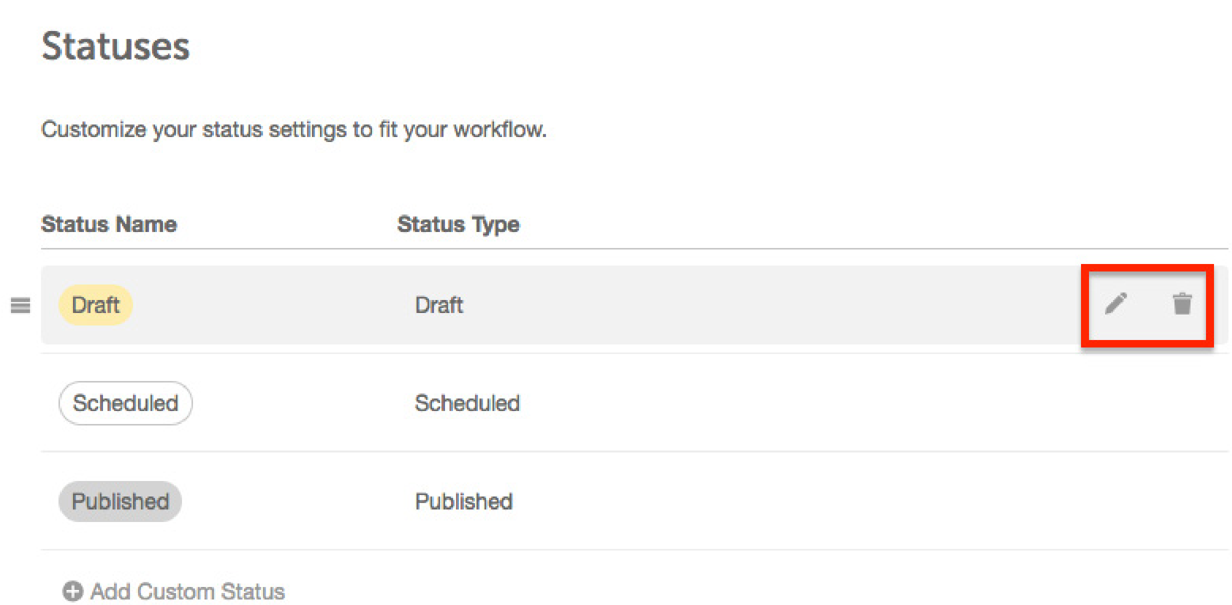
Supporting effective workflow management requires using the right tools. Whether you use task management software, a project management platform, or another type of tool, managing agile processes in general is easier when you have apps to get the job.

If you choose CoSchedule as your marketing project management platform, you can use Custom Statuses to manage workflows on every project. They allow you to set customized status labels that match the actual stages of your workflow.

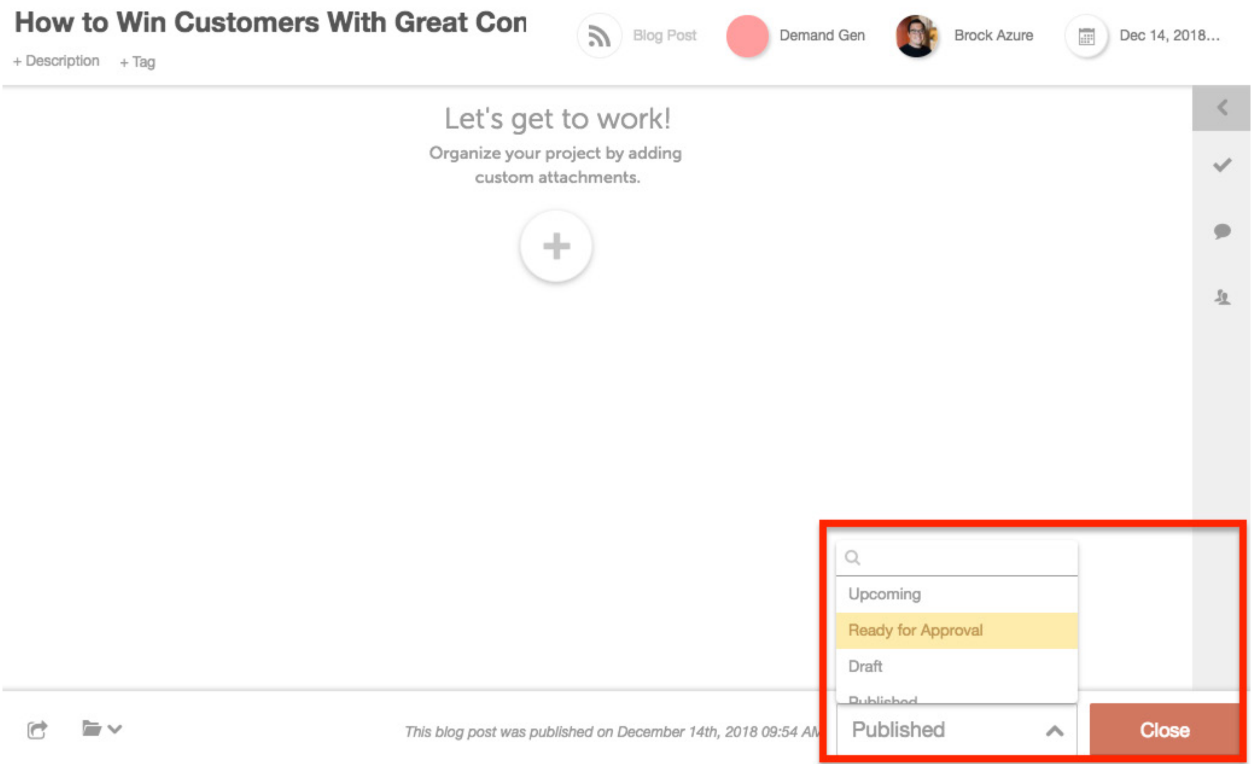
To get started, find the Custom Status option under Settings:



Next, type in the name of your desired status, and its corresponding status type:



Once you've created your custom statuses, you'll be able to label projects according to their current status (in this example, a project is Ready For Approval):



This makes it easy to use CoSchedule to manage workflows using the exact language your team has adopted internally to refer to each phase of each project you'll plan and execute.

Creating Task-Based Checklists

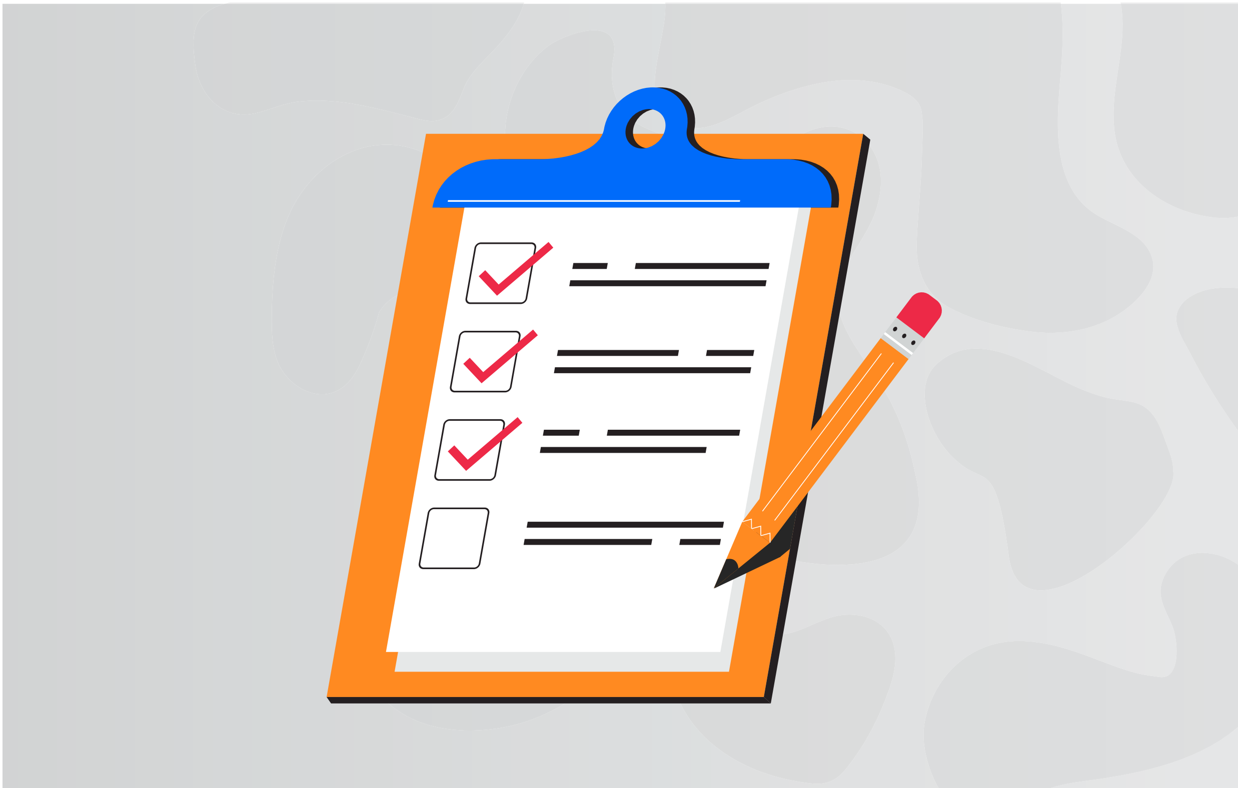
Now, project statuses show at a high level how a project is progressing toward completion. But, what they don't show is what specific steps have been completed to get the project to that state.

This is where having your team use checklists can be useful. While using checklists isn't necessarily core to executing agile processes correctly, nor part of its guidelines by any means, they remain a useful tool that CoSchedule's marketing team swears by.

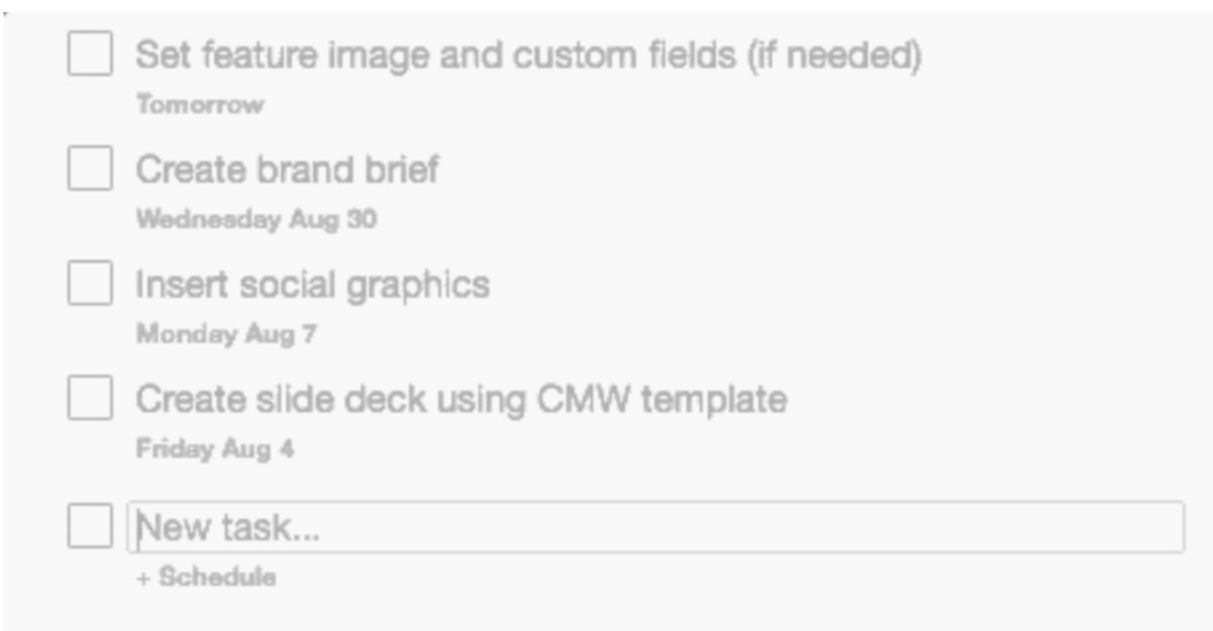
To create a checklist for each type of project your team executes, follow these steps:

- **List every step required to complete the project.**
- **Assign a role or team member to each step.**
- **Determine how long each step should take to complete.**

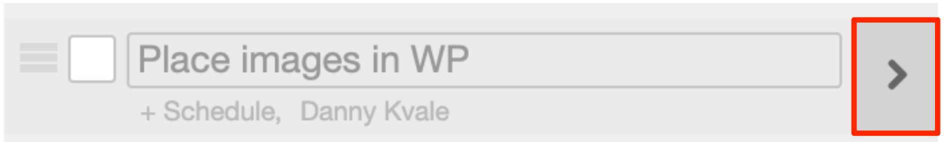
Then, map these out to a checklist you can create using a spreadsheet:



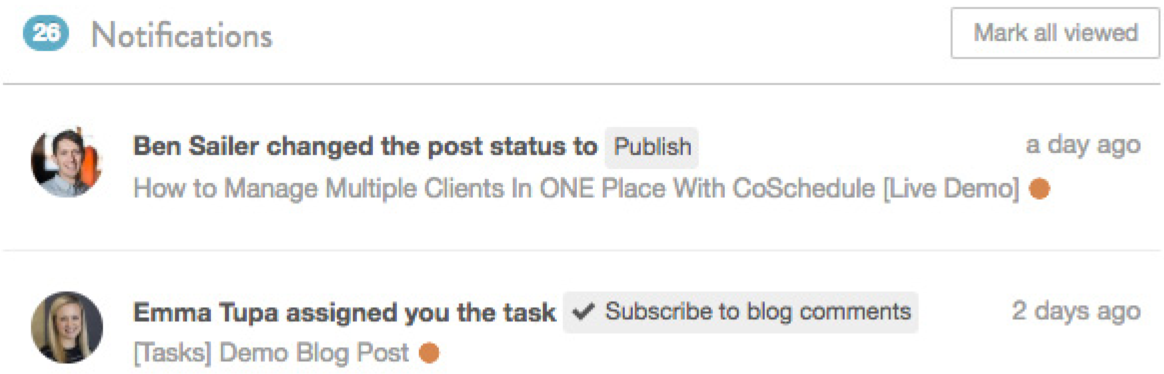
Alternately, CoSchedule supports checklist creation using [Tasks and Task Templates](). Lists of tasks can be created for each project individually, or they can be built using templates that can be applied to projects automatically (without having to recreate them each time).



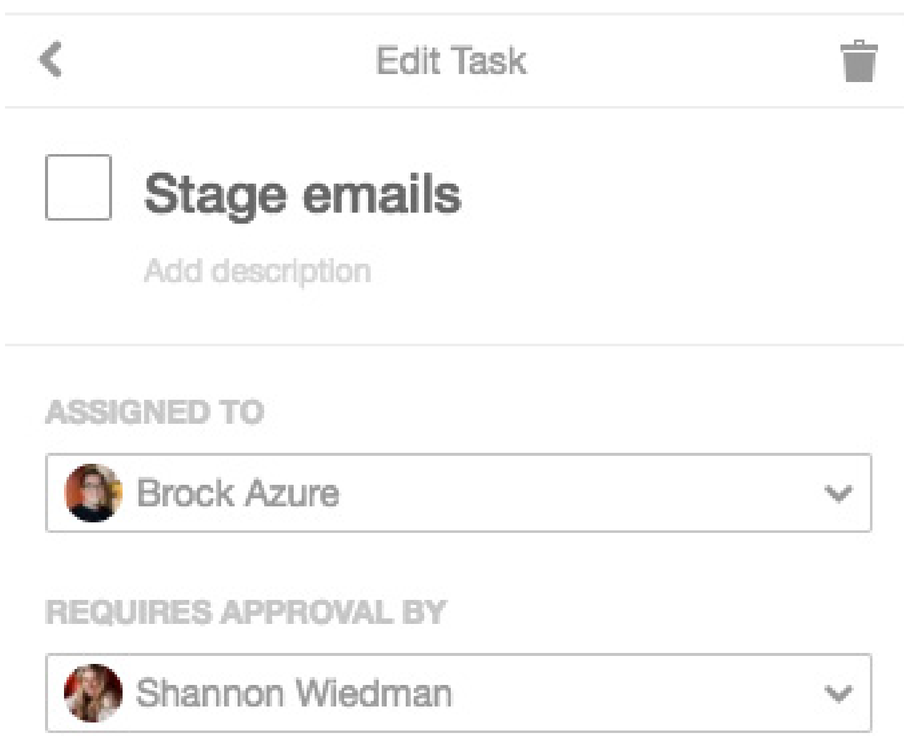
For each task, it's easy to assign a team member and set a deadline (each task can also have [smaller subtasks](#) within it, too):



Then, each team member will receive an email and a notification in their [CoSchedule dashboard](#) when each task is due:



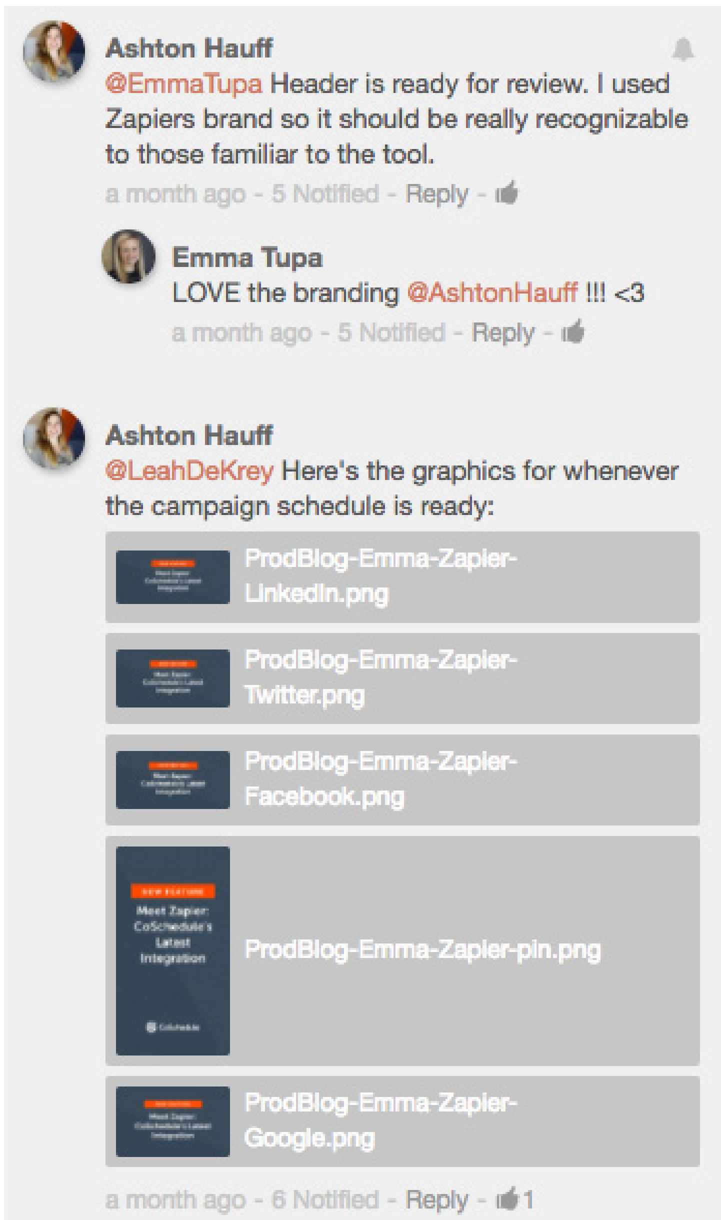
You can also set [task approvals](#) for steps that need to be reviewed by a manager before confirming they're complete.



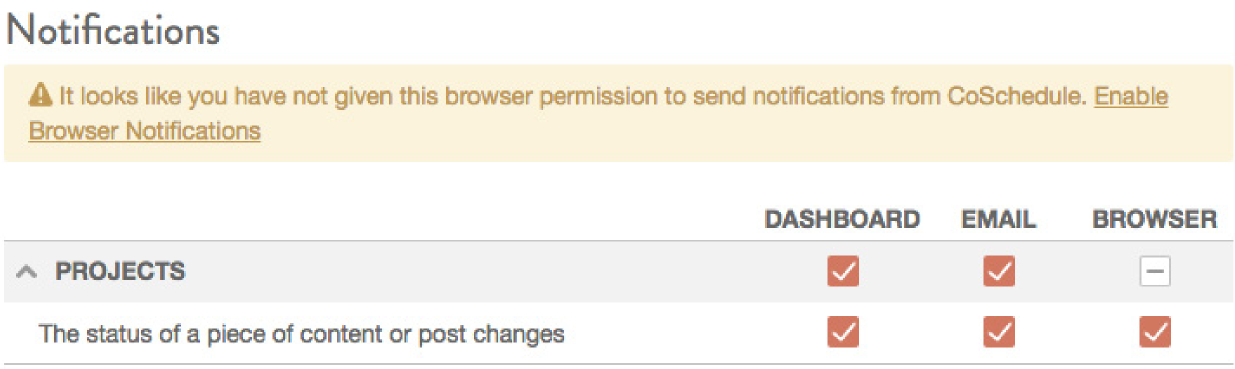
Combining Tasks and Statuses

For each type of project, certain tasks will likely need to be completed before it can be moved along to the next status. Group these tasks together on your checklist and indicate what needs to be done before you can consider a status to be complete.

CoSchedule users can do this with Task Discussions. Click into a Task in an applied Task Template:



Team members can be tagged in a discussion when their stage is ready (and they can also set notification preferences to be notified within the dashboard, by email, or in-browser when [project statuses are changed](#) too):



Refining and Improving Workflows

Over time, you might start to catch inefficiencies or common snags in your workflow. Rather than live with those problems, take the time to unravel frequent roadblocks and issues. There's always room for improvement, and agile works best when approached with this mindset.

If you find your team is constantly running into an issue, ask the following questions:

- **What's causing this issue?** Make sure you're addressing causes and not symptoms.
- **Is this something we can fix?** Once you've identified the source of an issue, finding a solution gets much easier.
- **Do we need to adjust the tasks in our checklists?** If the workflow needs to be changed, make an adjustment to your checklist.

Retrospectives are a good time and place to bring up potential issues that can be addressed.

An Example of an Agile Marketing Workflow Put Into Practice

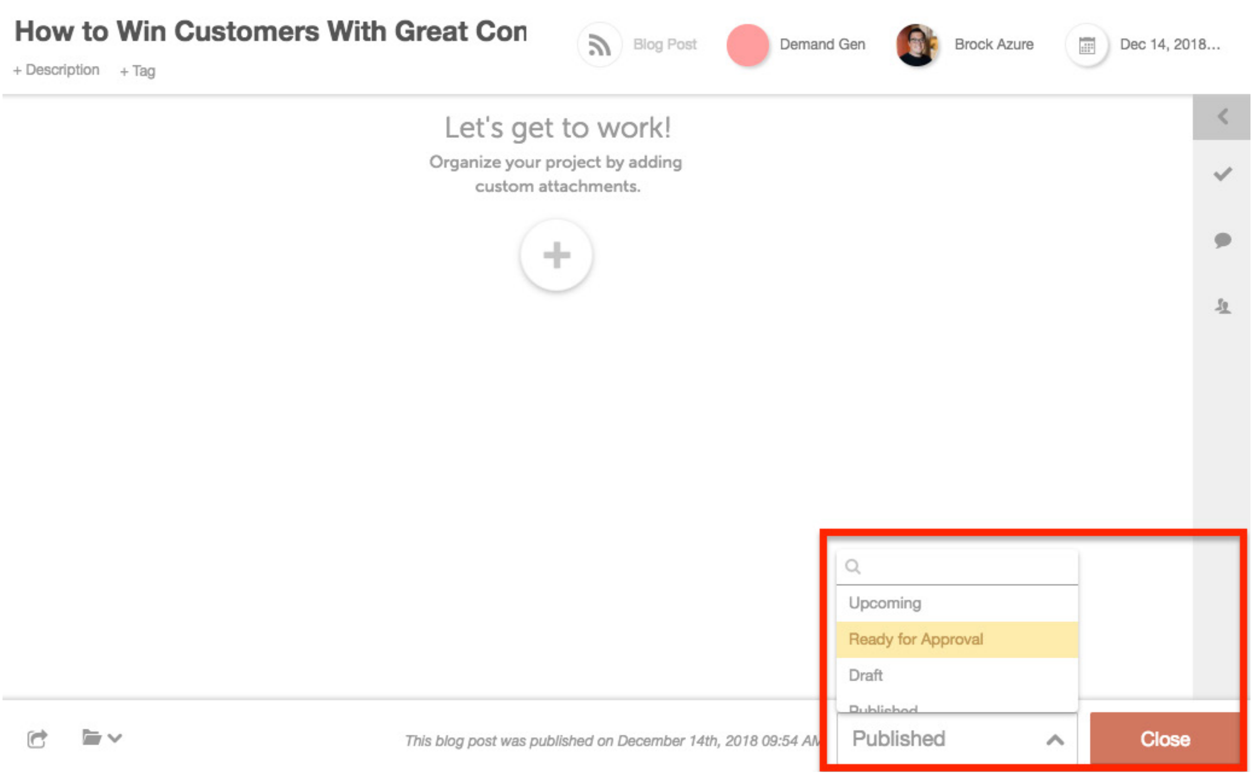
To better visualize how this process works from start to finish, it might be helpful to take a walk through each step in a hypothetical workflow.

For the sake of example, let's say a marketing team is working on creating a piece of content for their company's website. Their statuses for this type of project are:

Team members can be tagged in a discussion when their stage is ready (and they can also set notification preferences to be notified within the dashboard, by email, or in-browser when project statuses are changed too):

- **Draft:** The project is being written or created.
- **Review:** It's now ready for review and editing.
- **Scheduled:** The project has been completed and scheduled.
- **Published:** Shipped into the world.

That's a straightforward process for creating a piece of website content. To begin, a writer starts researching their topic and keywords they'll use on the page. Using CoSchedule, they set the status to Draft, which helps others on the team know what phase the project is at:

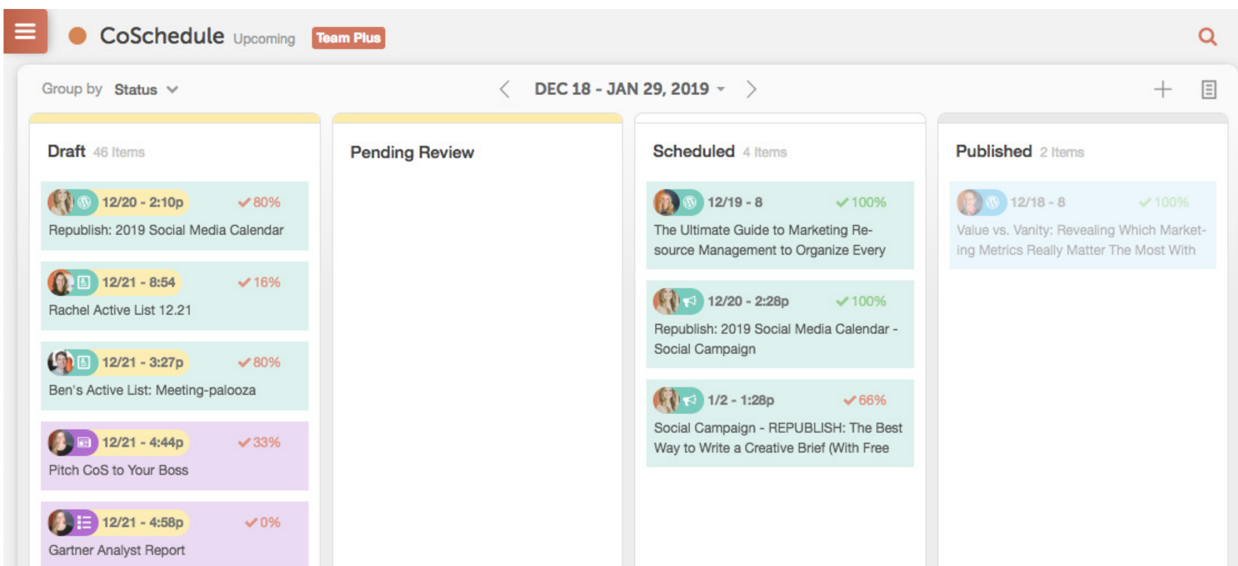


This status has several tasks that need to be completed before it can be considered done. These include:

- **Keyword research**
- **Content research**
- **Writing an outline**

These steps should be built into a checklist of tasks for the project:

Once this is done, they can switch the status to Review. If they're using CoSchedule (or another project management tool that supports kanban boards), using the [Kanban Project Dashboard] and filtering by Status will move this over to the next column:



At this point, the next person (someone in an editing or content management role) to proof and edit their work. They'll follow a similar process of checking off the steps required for their project status:

- **Proofread content.**
- **Double-check metadata.**
- **Review on-page SEO implementation.**

And then the process continues. Once they've done that, a graphic designer is ready to create the graphics for the page. Their tasks at the Design stage might include:

- **Research similar content.**
- **Review branding guidelines.**
- **Design graphics.**

Now You're Ready to Master Agile Marketing Workflows

Following this simple process for planning, managing, and executing workflows will make every project easier to ship from start to finish. Keep things simple at first, adjust steps as necessary, and eventually, you'll find your processes start to click into place.

CHAPTER 7

How to Improve Marketing Processes

With Agile Sprint Retrospectives

Once a sprint concludes, it's time to run a sprint retrospective. These are meetings that run for 30 minutes to an hour where the team reviews what went well and where things could have been done better. They offer teams an opportunity to review performance, suggest improvements, and implement those suggestions the next time a sprint or similar project is executed.

Running these meetings doesn't have to be complicated. However, it's important that they be run effectively and consistently so evaluating performance becomes a habit. This way the team will stay focused on continuous improvement, rather than making evaluating performance a "sometimes" sort of thing that satisfies a line item on a to-do list but doesn't support delivering better results.

In this chapter, you'll learn what makes retros so important for successful agile marketing teams. Plus, you'll see exactly how to schedule and run them, with examples you can follow.

What is an Agile Sprint Retrospective?

As previously stated, they are meetings held at the end of a sprint to review three things:

- **Was the project successful?** In other words, did the sprint meet its goals?
- **What went well?** Celebrate some wins!
- **How could it be improved for next time?** Inevitably, there are bound to some things that didn't go so well too. Think on how you can do better next time around.

The CoSchedule team has found this meeting format works well both at the end of a specific sprint, and at the end of the week for the entire team to review all their work holistically.

What Makes Retros So Important?

When implementing a new process, it's easy to simply start putting new steps into place without evaluating whether or not they're driving actual improvements. The feeling of having "done something" to solve a problem can sometimes mask lingering problems and inefficiencies.

Retrospectives help avoid this problem (and others) by achieving the following:

- **Pushing the team to evaluate performance honestly:** The only way to improve is to ensure you're not glossing over errors or overhyping success.
- **Giving team members the opportunity to voice feedback:** Positive or negative.
- **Making self-reflection a habit and not just an obligation:** Setting time aside for review ensures it gets done consistently.

Over time, this process will become a habit that helps push the team toward continuous improvement.

What Will You Need to Run These Meetings?

You don't need many resources to run an effective retrospective. Here's a short list of what you need:

- **Note-taking or word processing software:** Something like Evernote or OneNote, or Google Docs or Office 365, should be all you need to document meeting notes.

- **A room with a television or whiteboard:** If you'll be documenting notes on your computer, sharing your screen to a TV everyone can see works best. Otherwise, you can use a whiteboard with markers (and remember to take a photo of the board with your phone so nothing gets lost).

As long as you have a room with enough space for your team, a computer, and maybe something to write with, then you've got all you need. There are a few useful tips worth keeping in mind here though:

- **Create a recurring Google Calendar or Outlook Calendar event for the meeting.** This way, they stay on everyone's radar.

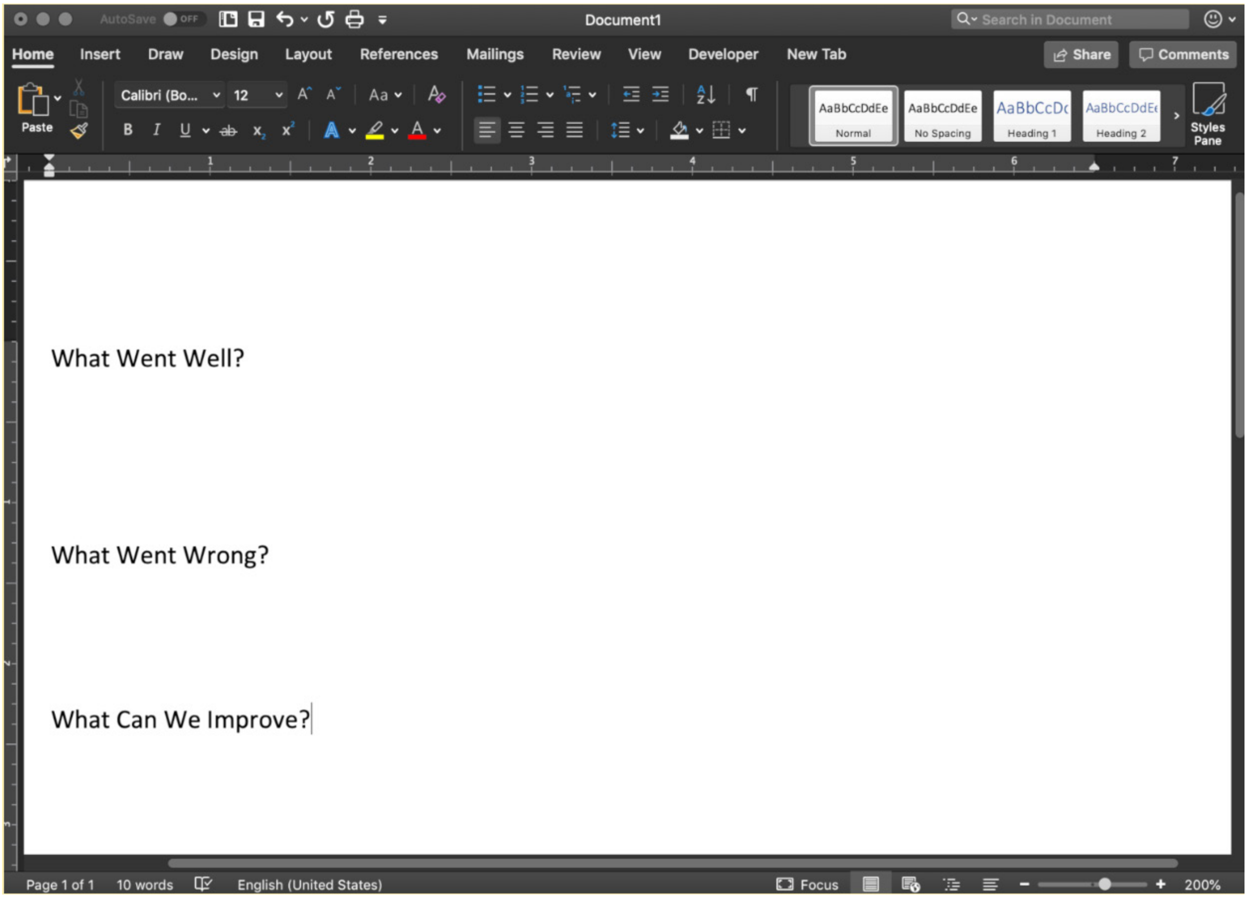
- **If necessary, reserve a room in advance.** That way, you won't have to scramble for space when meeting time rolls around.

- **Come prepared.** Make sure everyone knows they need to have something to talk about and contribute.

That covers all your bases to get started.

Running Sprint Retrospectives

Once the team has gathered at the meeting time (make sure there aren't any stragglers), then you're ready to get down to business. The simplest way to get going is to create and open a document that looks something like this:



That's literally it. Simple enough, right? Now, dedicate ten minutes to each section (positives, negatives, and things to improve).

To make sure team members don't talk over each other (if this does become a problem) consider having each person raise their hand before making a statement. If that feels too much like grade school, and if you want to make things more fun, you can have the team throw a Nerf ball or something to one another (with the ball-holder being the speaker).

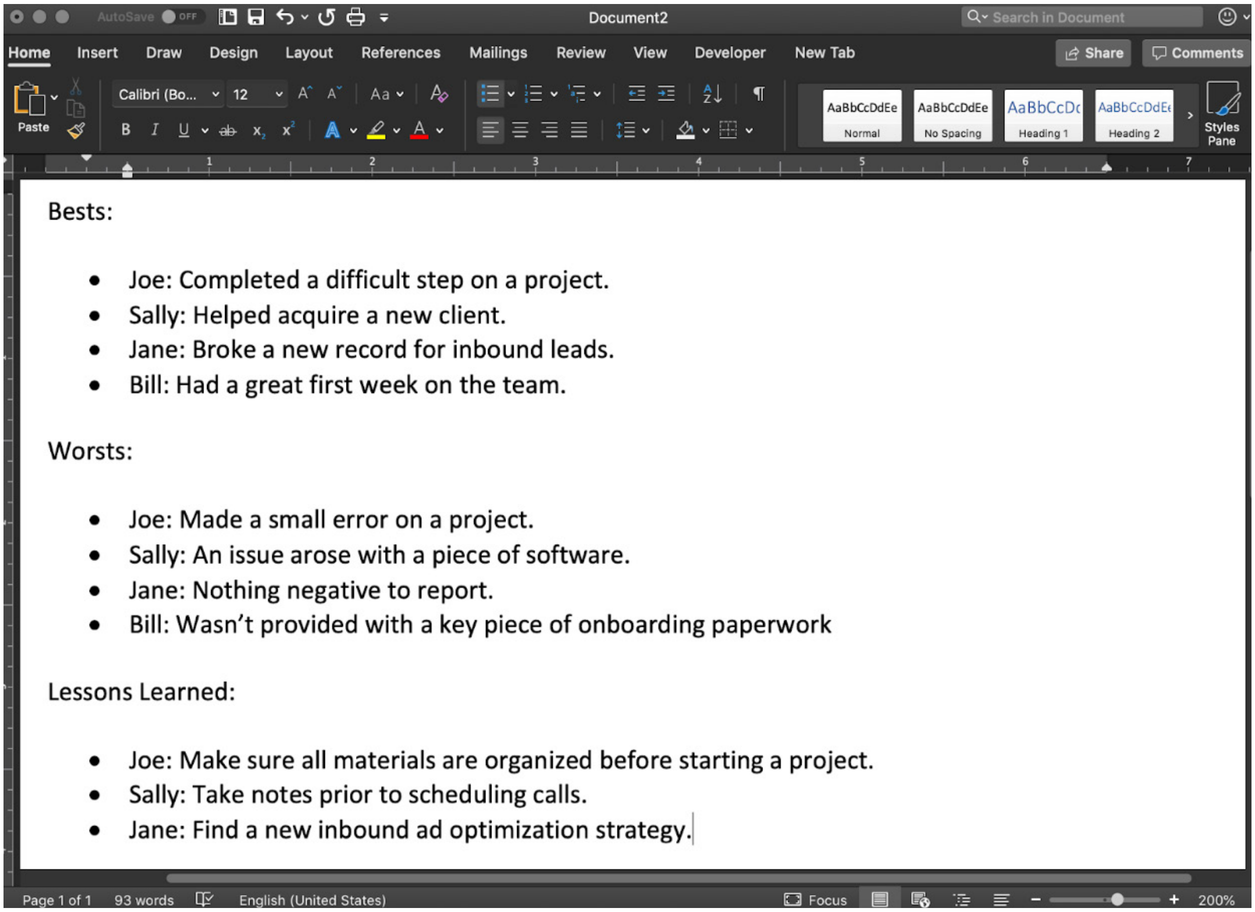
While this discussion is happening, the scrum master should be documenting key points and taking notes on the discussion. These points can be summarized, but should not leave out important details.

Adding Another Meeting: The Weekly Retrospective

The CoSchedule team adds another meeting to its process: a weekly meeting to recap the workweek holistically.

This meeting is very similar to a traditional sprint retrospective. What changes, however, is feedback can be offered on anything regarding the company or marketing team. Each team member also shares their personal work wins and lessons learned.

To run this meeting, follow a similar format to that outlined in the previous section. But, add lines for each team member specifically, and ask each team member to contribute at least one item. The document should look like this:



Bests:

- Joe: Completed a difficult step on a project.
- Sally: Helped acquire a new client.
- Jane: Broke a new record for inbound leads.
- Bill: Had a great first week on the team.

Worsts:

- Joe: Made a small error on a project.
- Sally: An issue arose with a piece of software.
- Jane: Nothing negative to report.
- Bill: Wasn't provided with a key piece of onboarding paperwork

Lessons Learned:

- Joe: Make sure all materials are organized before starting a project.
- Sally: Take notes prior to scheduling calls.
- Jane: Find a new inbound ad optimization strategy.

What Should You Do Next?

Once you've held a retrospective, it's important to make sure all that feedback and all those insights don't disappear into a black hole, where they're never to be seen or heard again. To make these meetings valuable, that information needs to be acted upon. Here's how to proceed.

When Things Aren't Going Well ...

Now, when your team has a lot of successes, there may not be much to change. No need to fix what isn't broken, right?

When things fail or aren't going well though, then you need to act fast before problems fester, and cause even more problems in the future. There's a simple three-step process you can follow to get back on track:

- **Identify the cause of the problem.** Whatever it might be.
- **Work with relevant stakeholders to solve the problem.** Is there another individual in your company who can help solve this? If so, start with a simple conversation.
- **Make changes to ensure the problem doesn't happen again.** What can you do to prevent the problem from recurring?

What's important here is to make sure the issue is addressed quickly and steps are put into place to prevent it from happening again. However, it's also important not to overcorrect. In some cases, simply learning a lesson from a mistake may be sufficient, with no further action needed. Use your best judgement.

Implementing Suggestions For Improvement

What if you get insights from your team for things that could just be made better? Maybe some things that could be done differently, or new things you haven't tried before, but might deliver a positive impact?

In that case, consider the following points before moving forward:

- **What are the potential benefits of implementing this change?** And would they be enough to warrant the level of effort required to make it happen?
- **Do we have the resources to execute this change?** If not, what would need to acquire? New tools? More people? Trading a current tactic to execute a different one?

Let's say you decide to move forward with making an improvement to an existing process. For the sake of this example, say you'll start reviewing email newsletters before you publish them. This is something you can start doing right away simply by assigning a team member to review copy. Next time you run a retrospective, you can follow up on whether this cut down on errors.

You're Ready to Implement Agile Marketing

This concludes your guide to getting started with agile marketing processes. Hopefully, you've found it useful, and will consider bookmarking it for future reference. And with that, congratulations in advance on transforming your marketing team, one sprint at a time.