HOW TO

# Get Started With Agile Marketing

AND DO BETTER WORK

A BOOK BY COSCHEDULE

**BEN SAILER**

# How To Get Started With Agile Marketing

*And Do Better Work*

A Book By CoSchedule

Ben Sailer

**About CoSchedule**
CoSchedule is a family of agile marketing products that will help you stay focused, deliver projects on time, and make your team happy. Learn more at CoSchedule.com.

**Apply This Advice With Downloadable Templates + Resources**
This book references templates and resources you can download. They're important for learning how to implement the processes outlined in the following pages. You can find them here: coschedule.com/agile-book-resources

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# Reader Testimonials

“This is a great roadmap for getting started with agile practices in a marketing organization! It breaks down complexities in a straightforward way that every marketer can understand, and you can tell it was written by people who have been in the trenches making it work.”

— Andrea Fryrear, Agile Marketing Coach & Trainer,
Co-Founder of AgileSherpas

“Everyone talks about it, but few really get it. I didn’t until I sat down with this. It’s the simplest, most complete guide to one of the most powerful approaches to marketing and productivity in general. If you’ve got a team, you should read this.”

— Andy Crestodina, Co-Founder of Orbit Media Studios

“Agile marketing was a new concept to me. My understanding of it was superficial. CoSchedule’s agile marketing guide helped me understand the processes and procedures to do agile marketing right and to optimize its impact. I also had the great honor to have Ben Sailer to be a guest on my weekly live streaming show; Ben’s explanation of agile marketing and examples of its implementation further deepened my understanding of the concept.”

— Ai Addyson-Zhang, digital learning consultant,
Adobe Education Leader, and host of
Classroom Without Walls

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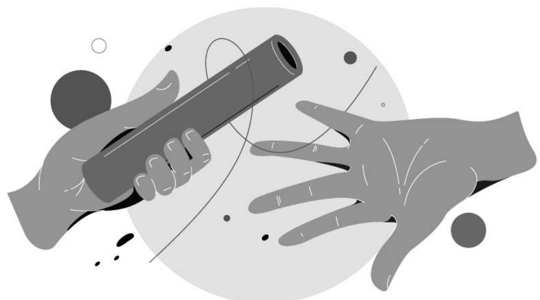
CHAPTER 1

# How to Get Started With Agile Marketing

## *And Do Your Best Work*



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 SaaS company (offering a world-class software suite that helps marketers get organized), landing at number 153 on the Inc. 500 list in 2018 and earning a spot on Gartner's Magic Quadrant for Content Marketing Platforms.

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.

# 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 across all kinds of verticals. 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 authority on the subject. It's such a broad topic with so many varying approaches that one resource covering every aspect of agile inside and out would be an intimidating challenge (both to create and to read).

Instead, it breaks down the basics of what you need to know, and explains how to actually implement it with easy-to-follow step-by-step instructions. It's all informed by what has worked for the marketing team at CoSchedule too, blending our own approach with some by-the-book explanation. There's some (strategic and thoughtful) 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 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.

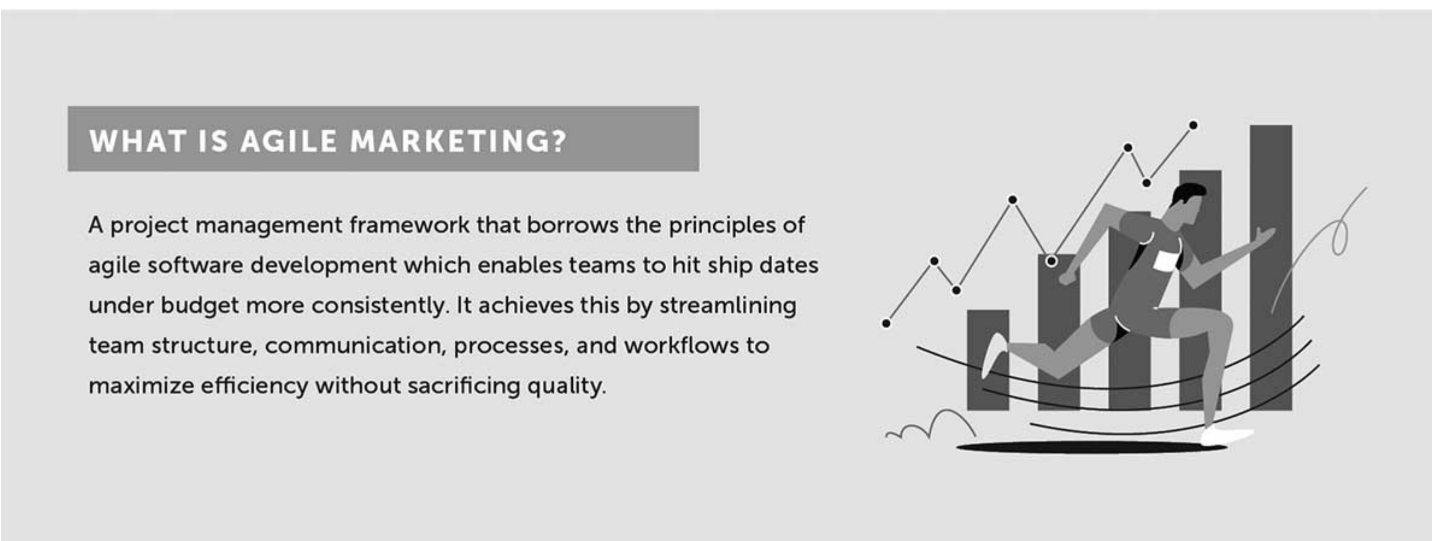
# So, What Exactly is Agile Marketing?

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) and applies it to a marketing context. It achieves this by streamlining team structure, communication, processes, and workflows to maximize efficiency without sacrificing quality.

This results in doing better work more quickly with fewer missed deadlines. It also allows teams to respond to changes in the market and adjust tactics according to what works much more rapidly than the typical annual "big campaign" advertising model.

**WHAT IS AGILE MARKETING?**

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.



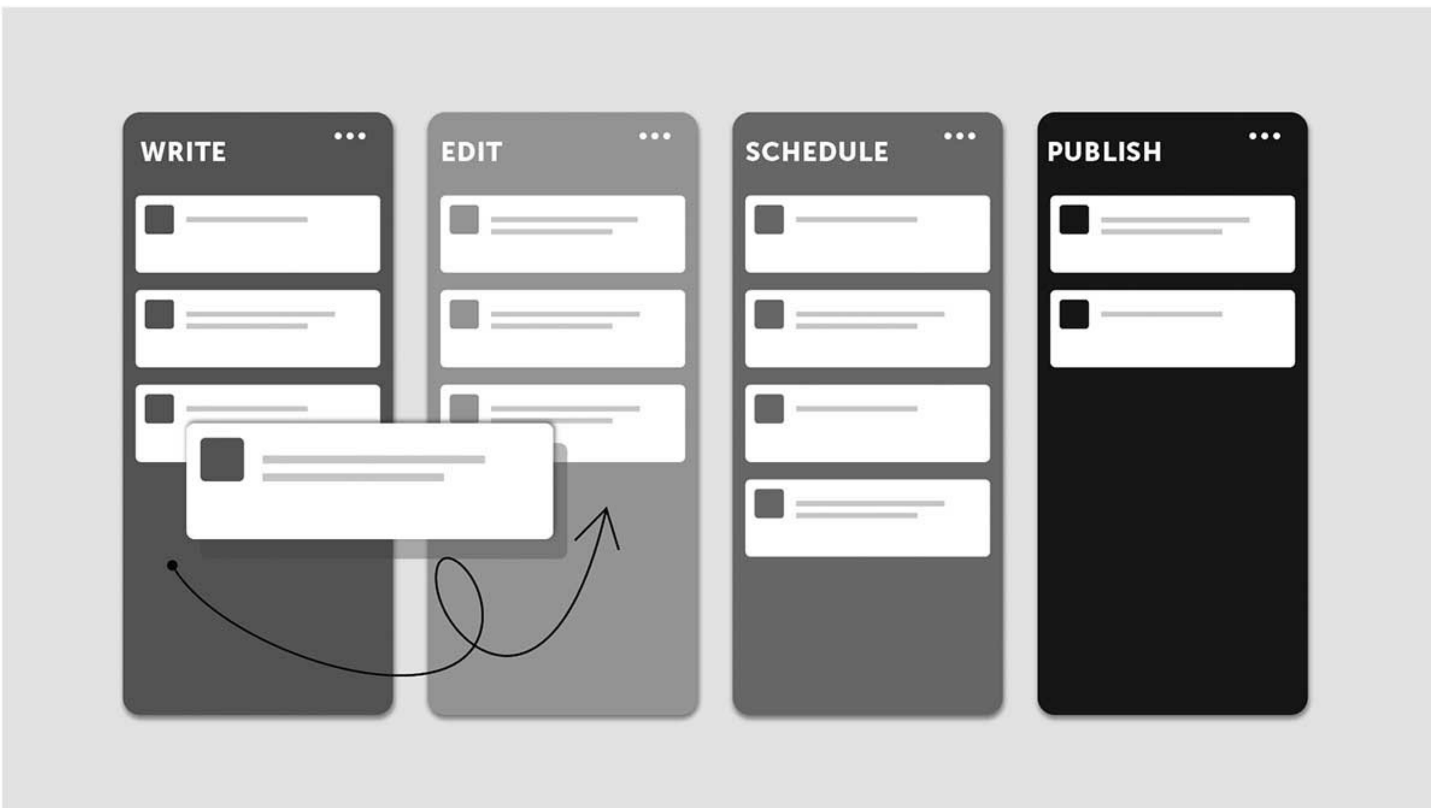
## Understanding the History of the Agile

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?

For that answer, let's go back to the early to mid-1900s and the Toyota Production System (TPS). 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 was 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 grew 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 it wasn't written with them in mind).

So, in 2012, mind mapping software company 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:

- **Validated learning over opinions and conventions.**
- **Customer focused collaboration over silos and hierarchy.**
- **Adaptive and iterative campaigns over Big Bang campaigns.**
- **The process of customer discovery over static prediction.**
- **Flexible vs. rigid planning.**
- **Responding to change over following a plan.**
- **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 real results based on what actually works.

That's a good point to lead off into why 50% of traditional marketers plan to adopt agile in the next year. 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 equals executing 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 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.

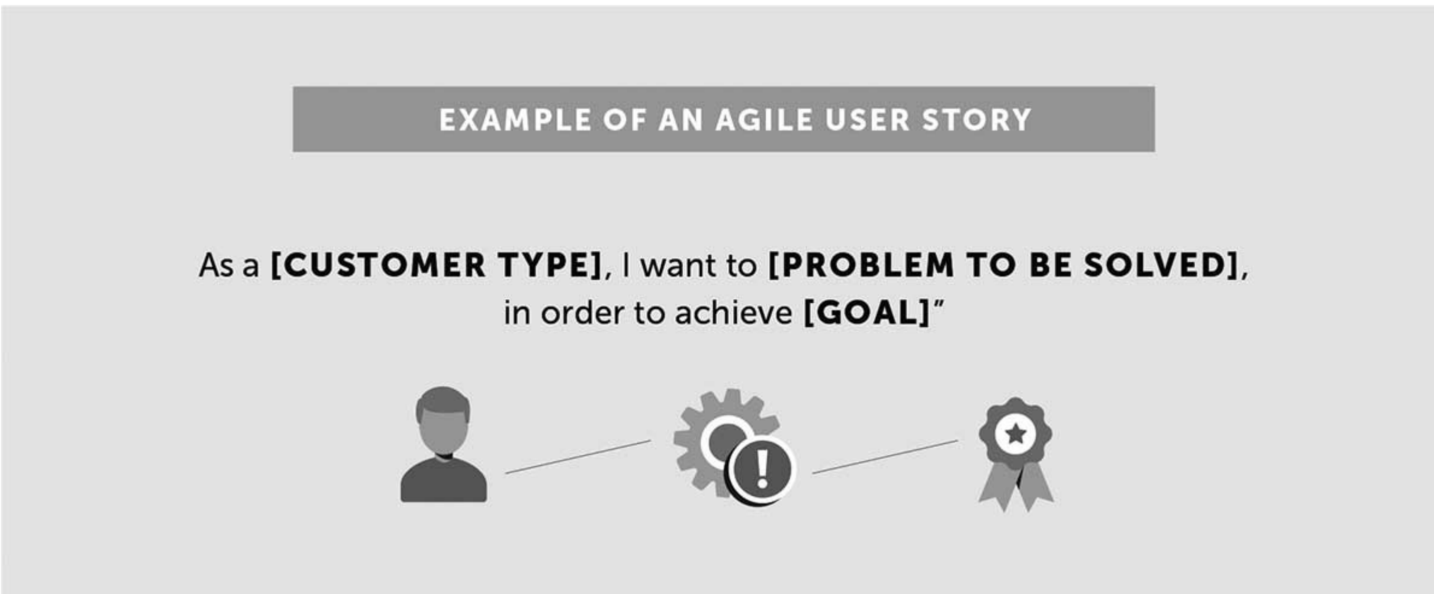
## How Does Agile Marketing Work?

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:

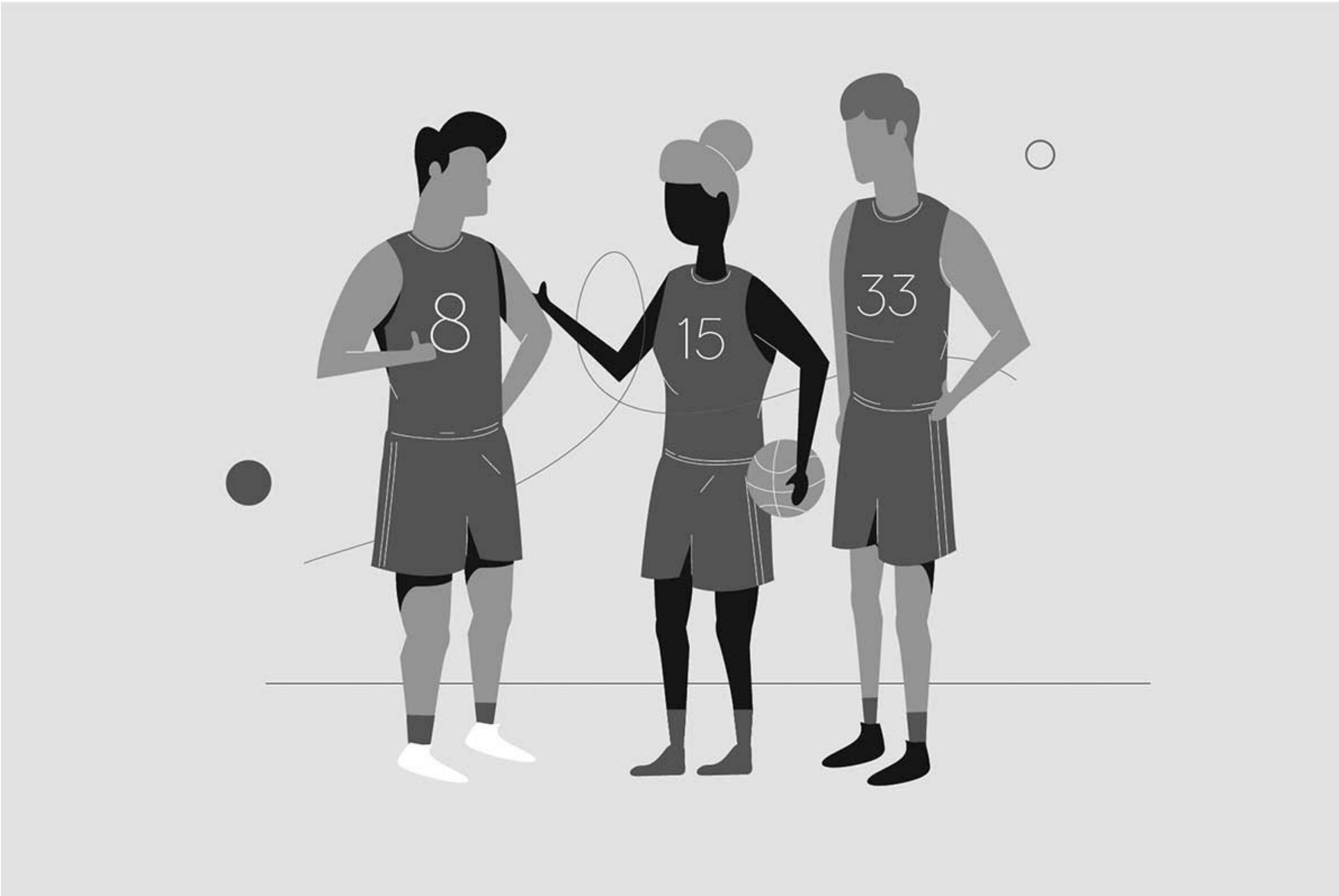
> As a [CUSTOMER TYPE], I want to [PROBLEM TO BE SOLVED], in order to achieve [GOAL].




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 later.



# 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 dependent 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

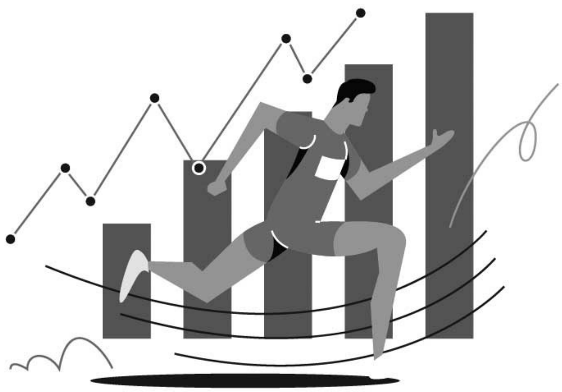
This last point may be the most obvious. But it's worth mentioning, because while many companies implement small pieces of an agile methodology, not all necessary understand exactly why they work the way they do, nor do they enjoy its full benefits.

## It’s Time for the Next Chapter

If you’re ready to take steps toward improving the way your team manages marketing projects and workflows, it’s time to do some reading, and then get down to work. In the following chapters, you’ll learn everything you need to know to get started. We’d wish you luck, but we know you’ve got this.

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 feel like pipe dreams. Last-minute projects derail priorities, meetings that should have been emails take you off task, and late nights at the office are part and parcel with the job.

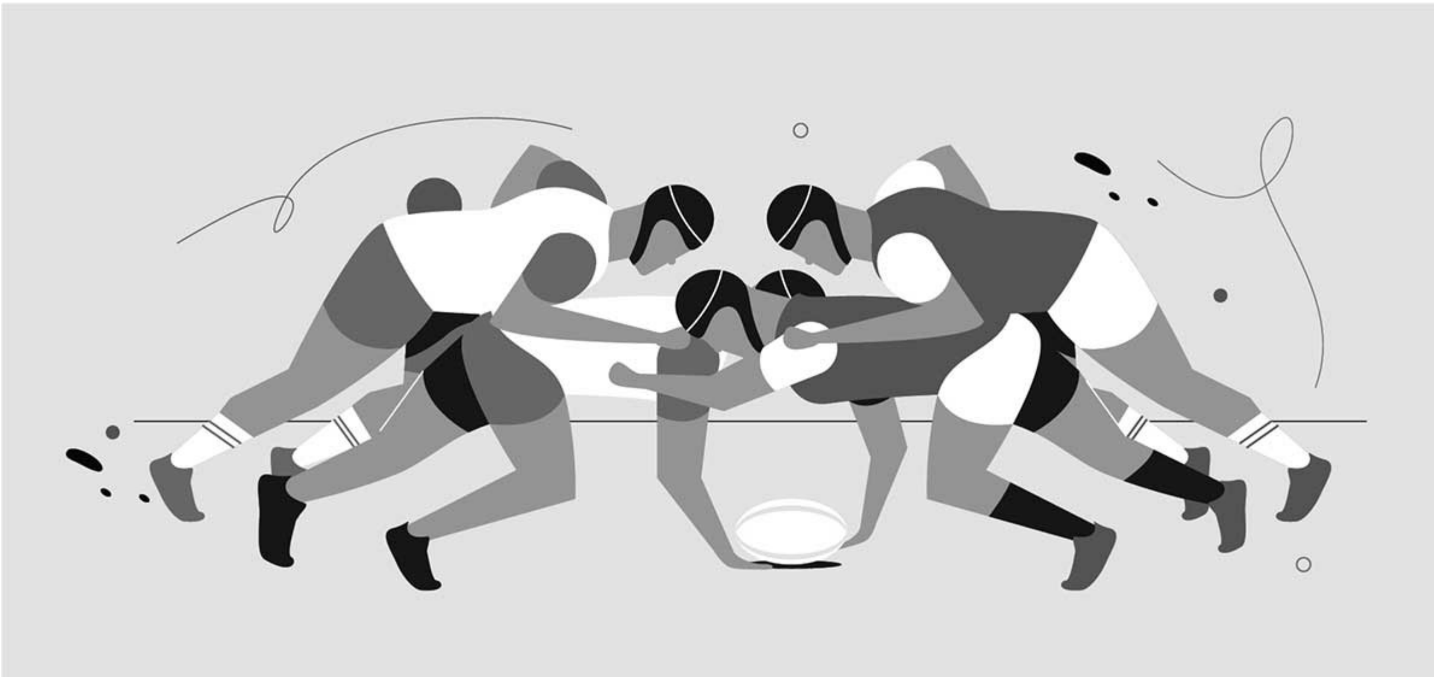
It all adds up to project delays and wasted money for substandard work. Those three things together do not add up to a productive workplace or a satisfying career.

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).

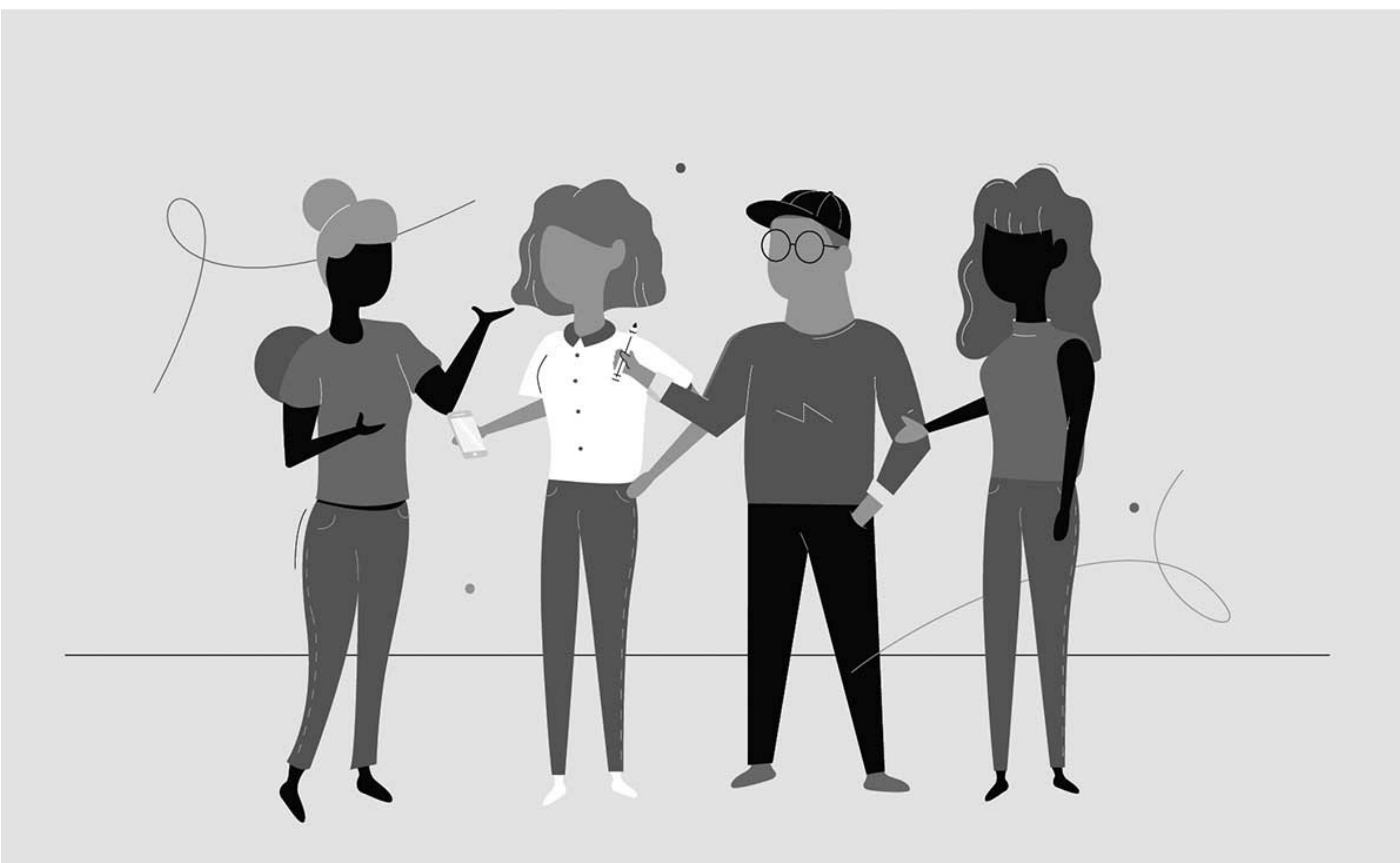
It's called **scrum**, and this chapter is all about how it works.

# 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. By removing as much waste and red tape from workflows as possible, everyone’s effort can be focused on doing the most important task at each step of a project.

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.

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.

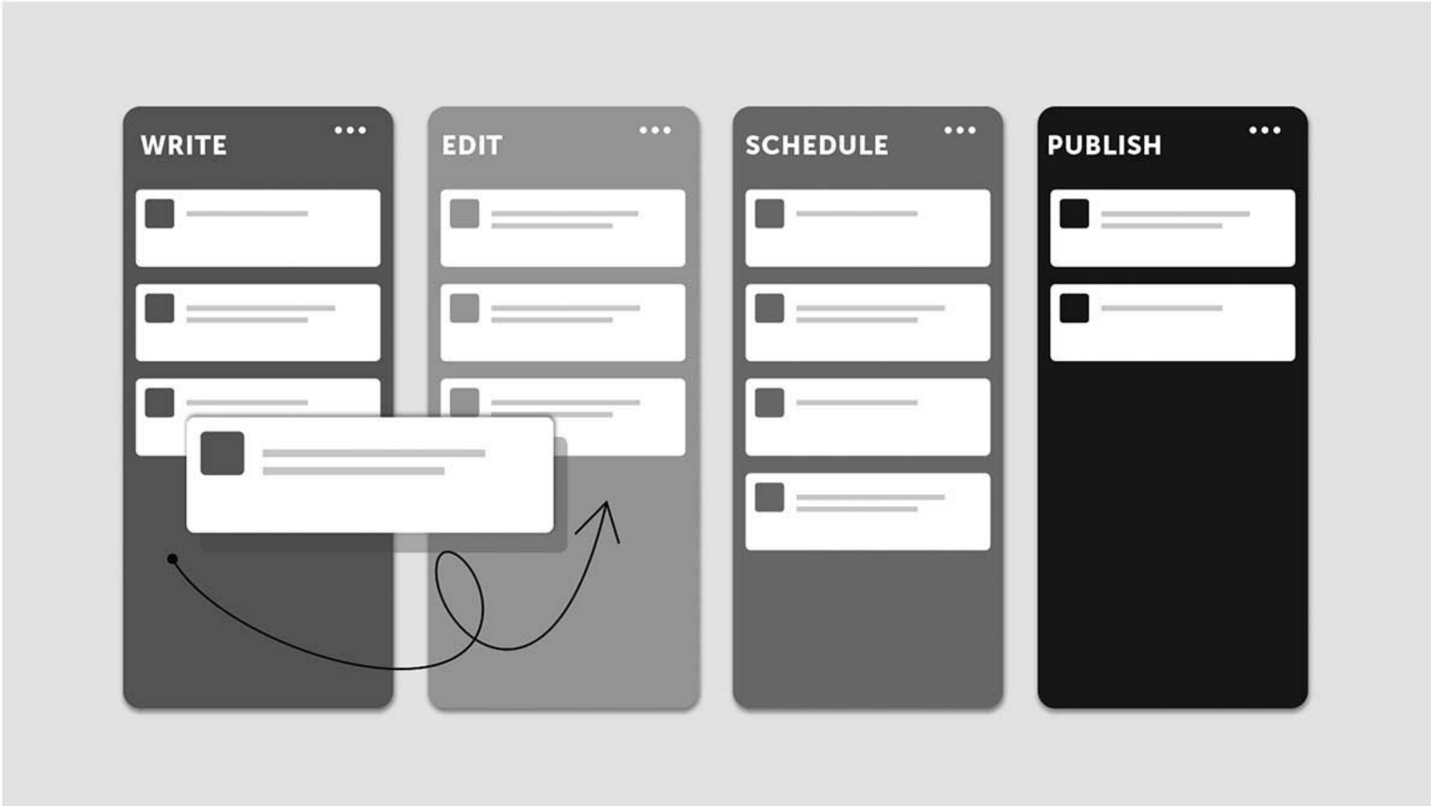
However, according to Techwell, "Jeff Sutherland invented scrum and later introduced it to Ken Schwaber."

Regardless of which side you're on, everyone can agree 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

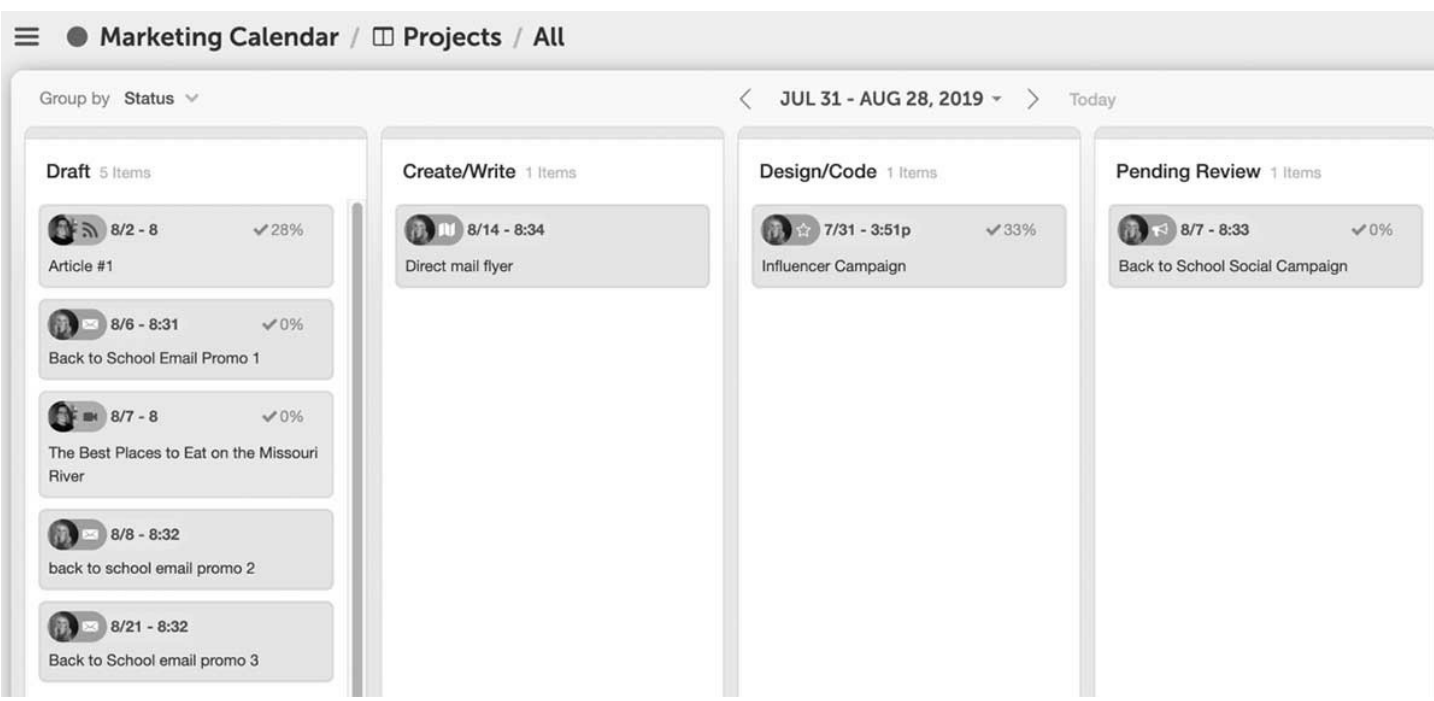
Scrum doesn't necessarily need to be executed just one way, either. There are several different variations to choose from, and it's adaptable to the needs of the organization putting it into place.

One such variation is called **scrumban**, which is a combination of scrum and kanban. 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 (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details). 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 strictly need, but it remains worthwhile reading.

## The Scrum Terms and Definitions You'll Need to Know

This guide has already thrown a few terms around 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 you'll be likely to encounter. It can seem complicated at first, but the general concepts behind agile are simple enough to easily understand the basics.

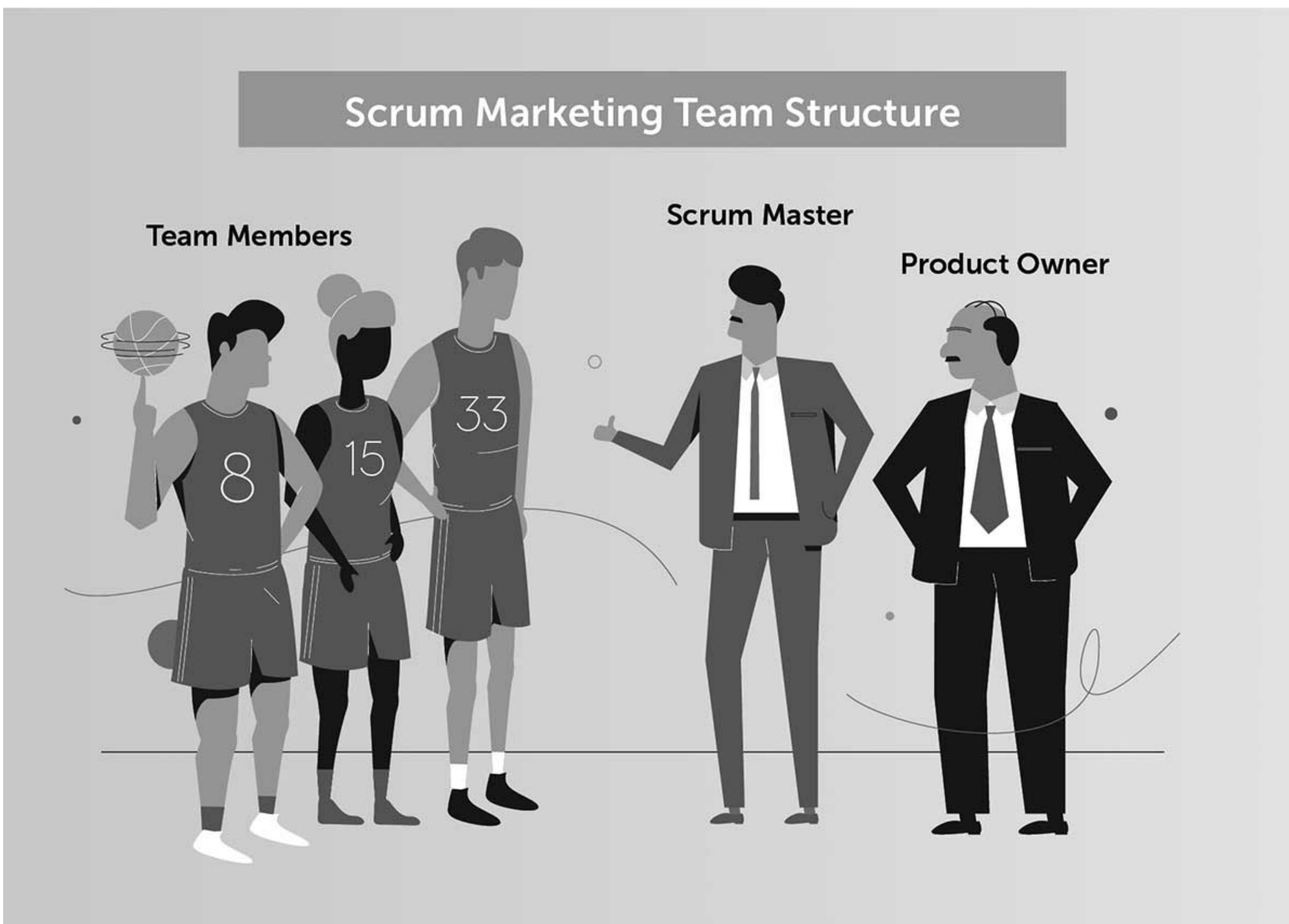
Here are some basic definitions (worded to make the most sense in a marketing context):

- **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.
- **Sprint:** A short period of time during which a project will be completed (generally a week to a month).
- **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.
- **Retrospectives:** A meeting to reflect on how a sprint went, what was learned, and what could be improved upon 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).

## How Are Scrum Teams Organized?

Scrum is all about getting teams to work well together so they can 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. They should start by including three different roles:

- **The Product Owner** establishes what's needed for completion. As stated before, this is the central decision-maker on the team. For marketing teams, the term "Project Owner" may make more sense.
- The **scrum master** manages the process day-to-day. This entails removing blockers, running standups (daily status meetings covered in chapter 5) and retrospectives (post-project meetings covered in chapter 7), and ensuring the team has what it needs to get its work done. This can be the same person as your Project Owner, or another individual.
- Each **team member** takes care of their own work. Rather than having a boss breathing down their necks, 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 they 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) 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 in this chapter):

| A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|
| **Tactic** | **Owner** | **Goal** | **Problem** | **Story** | **Hypotheses** | **Measurement** |
| *What is the name of this project?* | *Who on the content marketing team is driving this?* | *What outcome will this influence? (e.g. company grade high prospects)* | *What top problem does this project solve (e.g. {this} is the top problem that prevents us from getting more company grade high prospects)* | *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 projecct meets the hypotheses. Build this before executing. (e.g. We will track the number of prospects broken down by each company grade that resulted first from a specific URL using this report in Kissmetrics).* |

| H | I | J | K | L | M |
|---|---|---|---|---|---|
| **Date Shipped** | **Date Analyzed** | **Actual Result** | **Retro Date** | **Next Steps** | **Who Needs To Know** |
| *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.* |

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).

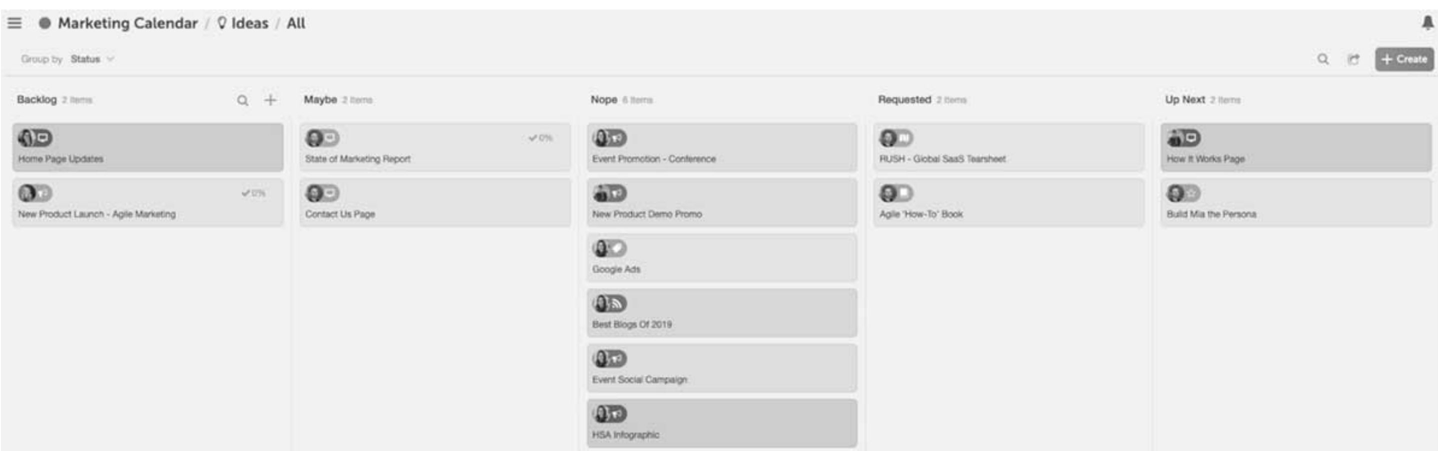
- **Hypothesis:** “[IDEA] will improve [GOAL] by [PERCENTAGE].”
- **Measurement:** Briefly explain how the campaign, tactic, or project will be measured to prove its impact.

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 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.

CoSchedule customers can also use the Idea Board (available on Professional and Enterprise Content Organizer and Marketing Suite plans—see details) to manage their project backlog. It makes it possible to organize ideas into columns (which you can label what you would like). **This works best for unplanned projects.**




## 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, sprint planning 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:

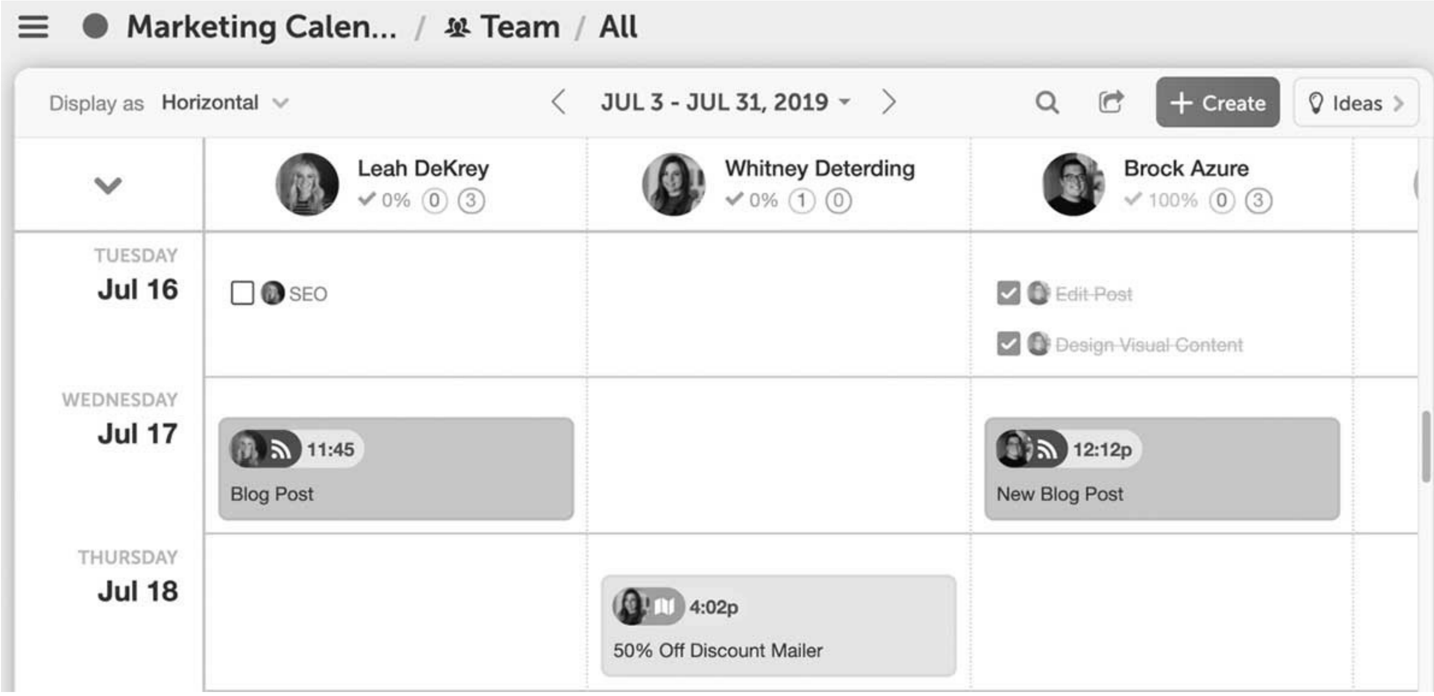
- **What did they do yesterday?** Which concrete actions did they execute?
- **What will they do today?** And does their work accurately follow the sprint?
- **Is there anything stopping them from getting their work done?** And how can those blockers be removed?

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."

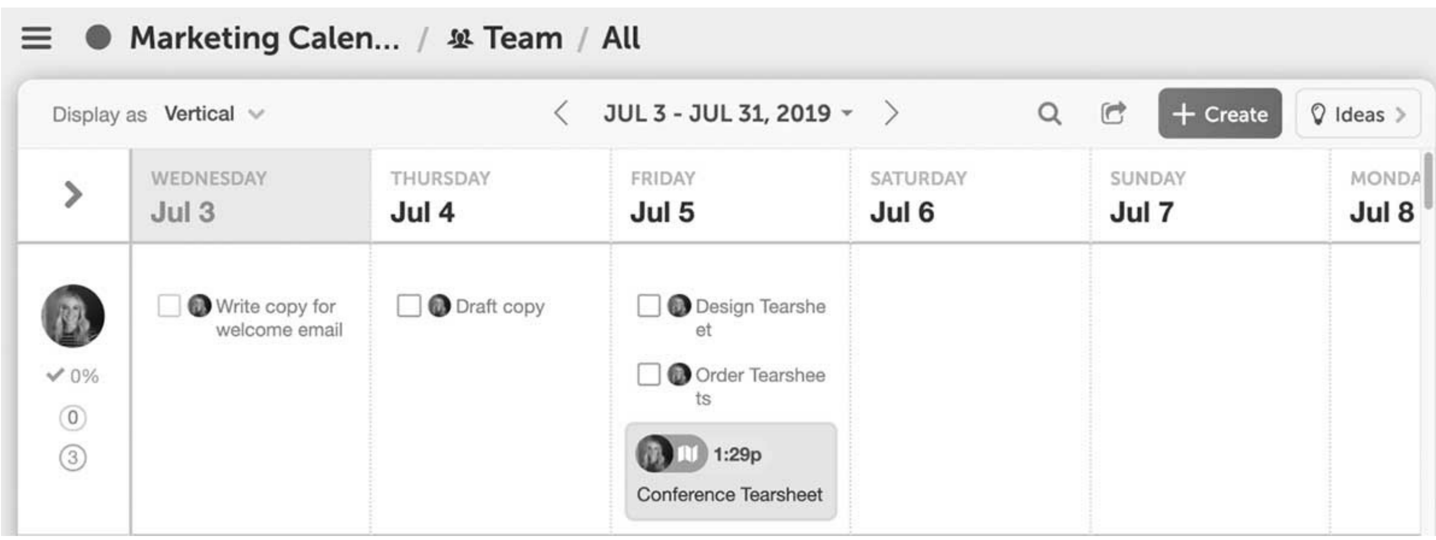
You may have one broadly-focused standup in the morning to discuss all your work, separate standups for each project, or a combination of the two approaches.

CoSchedule helps support teams manage standups with its Team Management Dashboard (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details). 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.

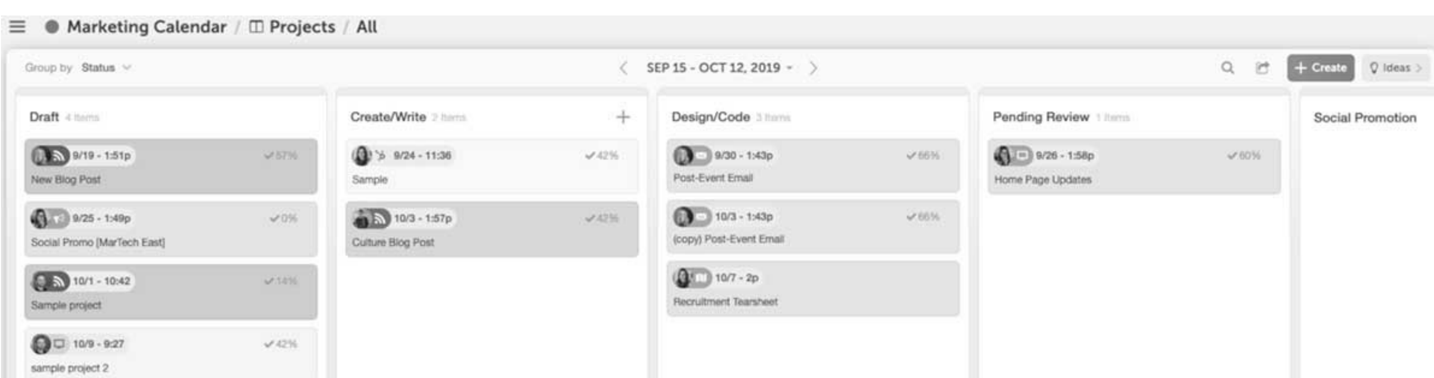
It displays days and tasks in horizontal view:



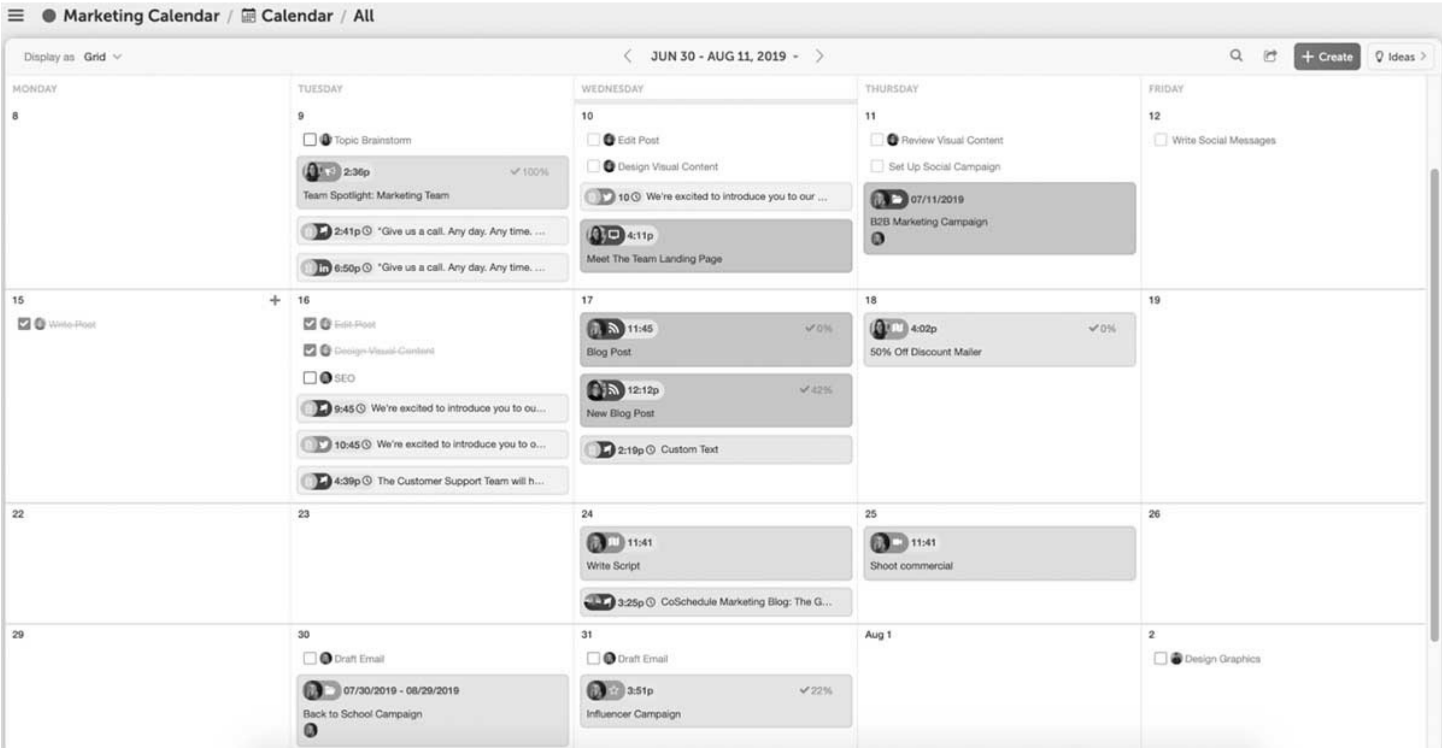

And in a vertical alignment too. It's highly customizable as well so teams can adjust the way it works to their own needs:




The Kanban Project Dashboard (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details) offers another view for **managing planned projects**. Once all the tasks are completed for a particular project phase, it can be moved over one column to the right.




The Marketing Calendar (available with all CoSchedule plans—see details) 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.**
- **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 be some things that didn't go so well too. Think how you can do better next time around.

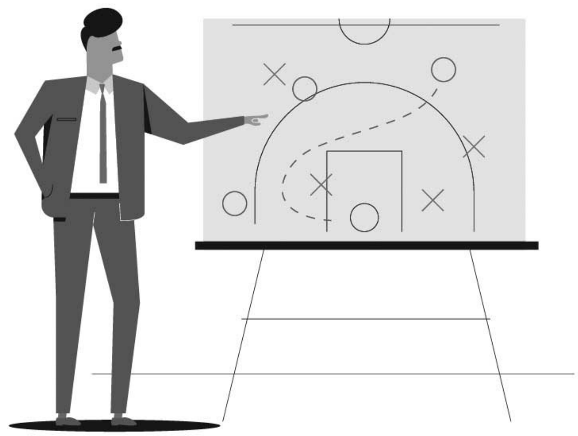
That summarizes the bulk of how scrum can be applied to a marketing context.

## 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.

Your team is made up of writers, editors, and some are great with SEO. Some people are just subject matter experts you need to extract the story from, who know nothing about content marketing. Your team runs the gamut and without a concerted effort to 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.

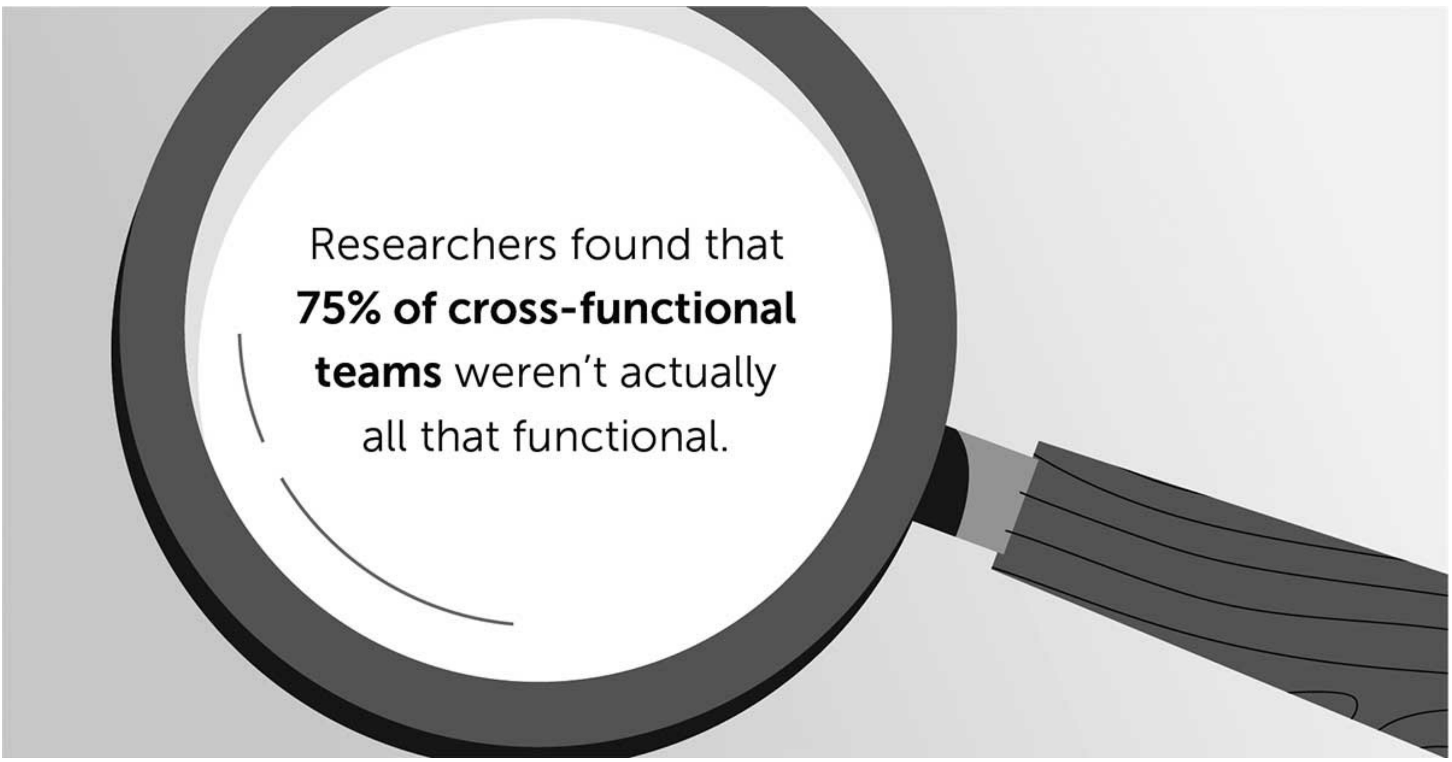
## When Cross-Functional Teams Go Dysfunctional

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.

> Researchers found that **75% of cross-functional teams** weren't actually all that functional.




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.

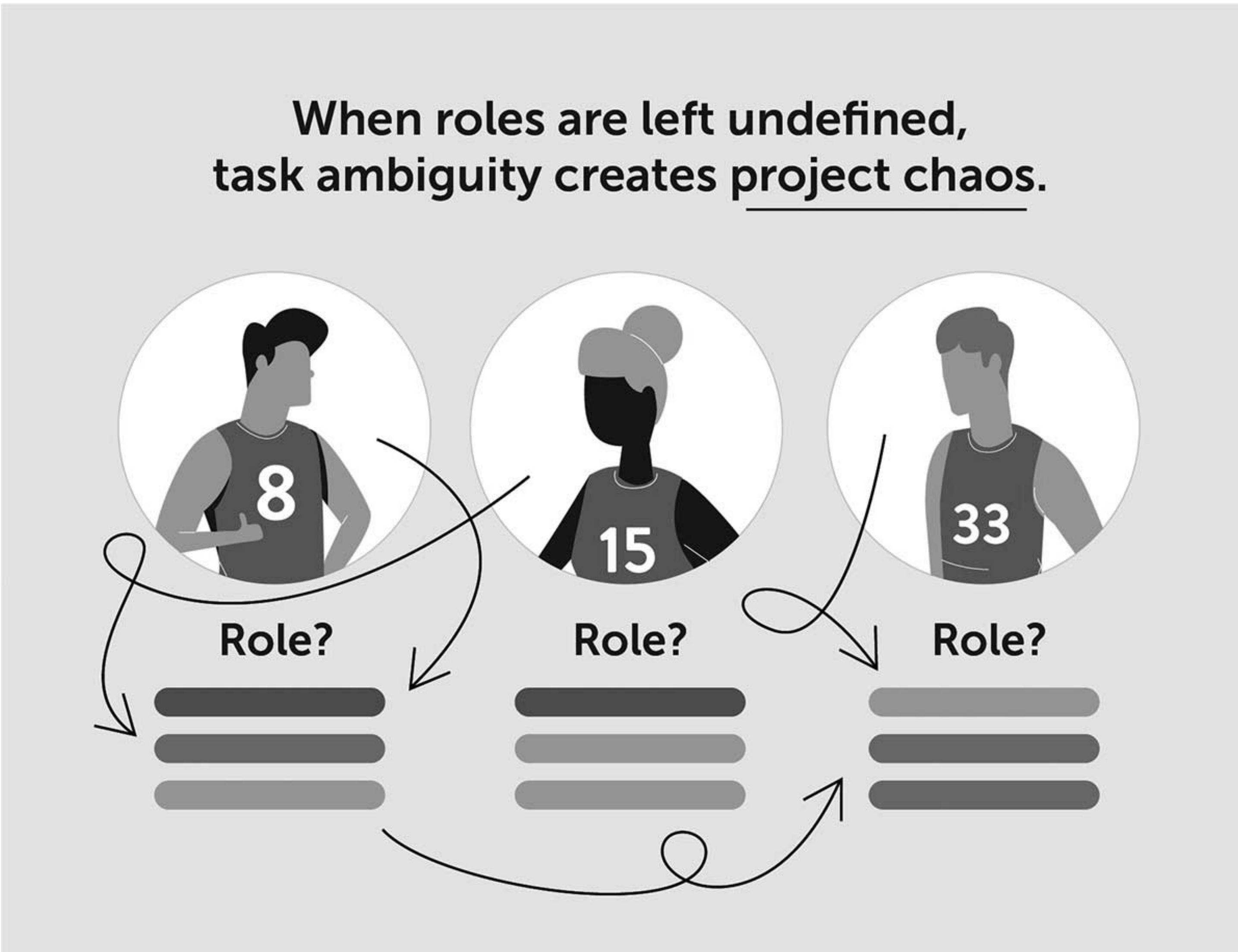
While you probably don't have 120 people on your team, the idea is one that still has value for the small guy: Not everyone dictates to everyone else about what will happen. Only the leaders do. This may cause some strife in some teams, particularly in those where hierarchy is abandoned.

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 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

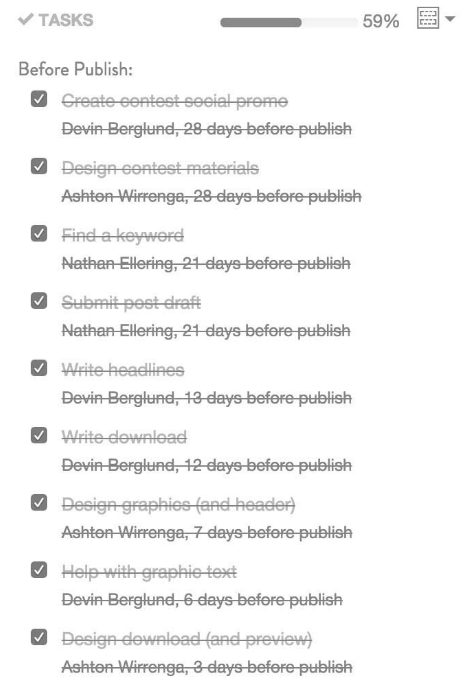
Got a system where each team member can get approval to proceed along the path toward completion?

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.




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.

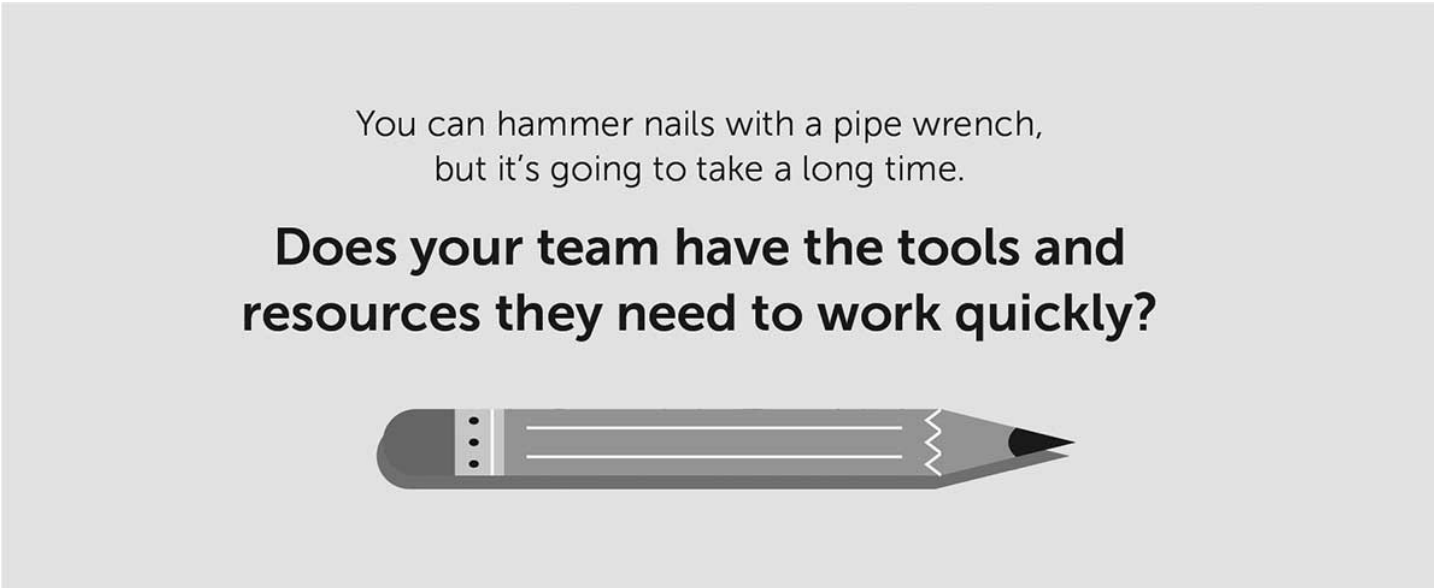
Lack of team efficiency is based on individuals not hitting deadlines. People miss deadlines because they're overwhelmed.

- **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.

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?**




- **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

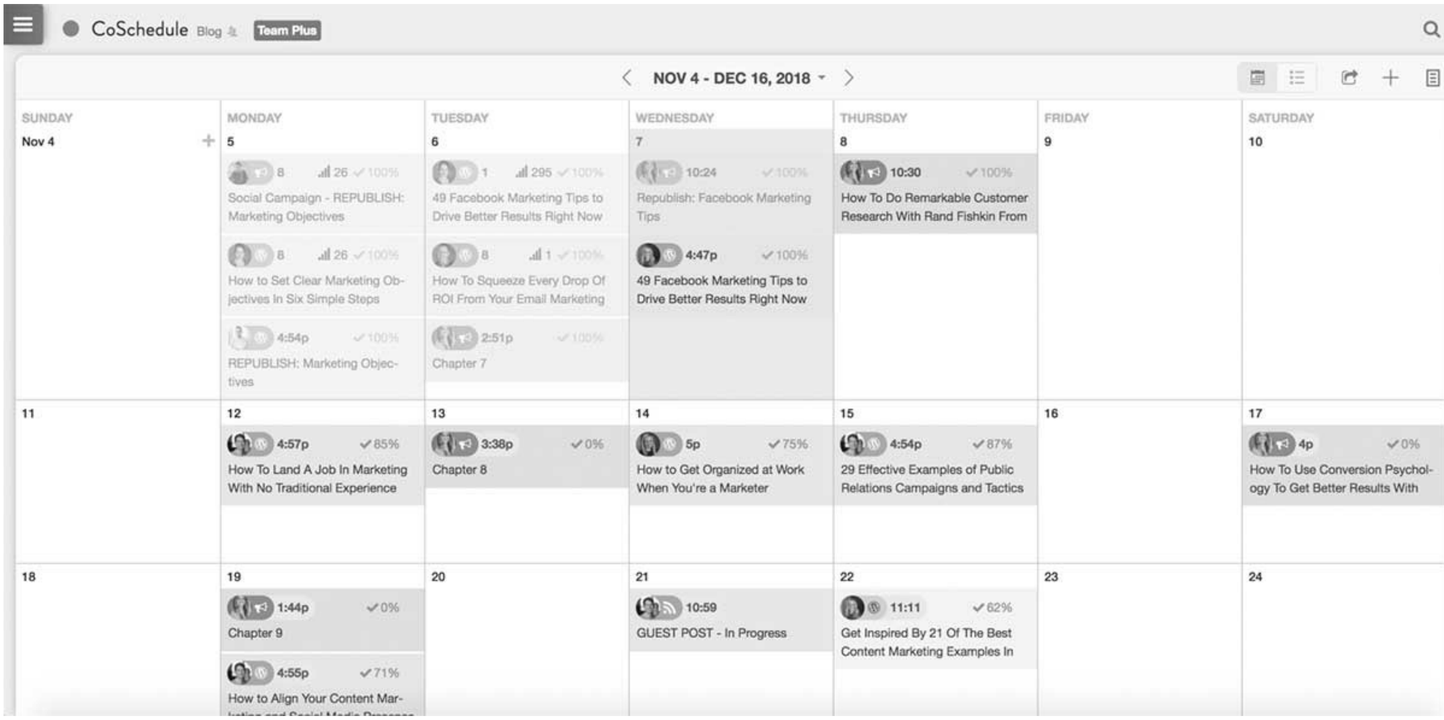
It's easy to lose sight of the bigger picture, particularly when each team member has a small picture to focus on to get their job done. Without a frequent big-picture check, you and your team won't stay on track to the common goal. You'll get caught up in minutiae, disagreements, and so on.

## KEEPING IN MIND

- How do you keep sight of the goal for each project or content piece?
- How do you make sure your team remembers the goals?
- Remember to 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 we take 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

Research shows that leading marketers proactively plan projects and campaigns. In fact, marketers who do so are 356% more likely to report success.

But, how can marketers actually plan anything effectively when required to work at a fast pace? The answer rests with agile sprint planning, a means of breaking down large projects into smaller chunks to make them easier to complete, and keep all your team's work organized.

The benefits of planning work this way are numerous. It stops teams from tackling projects in an ad hoc fashion, and instead makes intentional and strategic planning a habit. This helps ensure that the work you take on has a purpose, and has been determined to be the most impactful thing you should be working on at any given time.

The recommendations described in this chapter are not by-the-book prescriptions for how sprint planning should be done. Rather, it's a heavily-adapted process that the CoSchedule team has found to work well for marketing applications.

Here's how to get it done.

## Sprint Planning Terms and Definitions to Know

This chapter will use a number of terms you may not have heard before (and some you might need a mental refresher on). Here is a short list of terms and their definitions to help you make sense of it all.

- **Definition of Done:** The accepted standard of quality that determines when a step can be considered complete.
- **Daily Scrum Meeting:** Also called standup meeting. 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.
- **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 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.

# Planning and Executing Sprints in 6 Steps

Planning sprints by the book can be a complex process. While the traditional methodology you might read about elsewhere may be more applicable for software development (which you may read about elsewhere), marketers can streamline the process to better suit their own needs.

The marketing team at CoSchedule has done this with great success. Instead of breaking down all the nuts and bolts of sprint planning following a purist methodology, this chapter will share a simplified approach (that has been proven to work).

This is in no way a critique of other methods or means of planning sprints. Rather, the intention here is to provide you with a process that works, with any extraneous steps removed, so you can get started quickly and stay focused on the things that are most important (without feeling overburdened by processes that may not seem to make sense right away).

**Planning Agile Marketing Sprints in Six Steps**

1. Select a project from your backlog.
2. Write a creative brief.
3. Run a sprint planning meeting.
4. Map out the sprint on a marketing calendar.
5. Manage the work using a kanban board.
6. Measure and track project progress.

PLANNING

# Agile Marketing Sprints In Six Steps

**STEP 1**
Select a project from your backlog.

**STEP 2**
Write a creative brief.

**STEP 3**
Run a sprint planning meeting.

**STEP 4**
Map out the sprint on a marketing calendar.

**STEP 5**
Manage the work using a kanban board.

**STEP 6**
Measure and track project progress.

## Step 1: Select a Project From Your Backlog

A sprint or project backlog is a list of ideas that you'll execute in the future. It's a good practice to keep all those ideas organized somewhere so they don't get forgotten. And if yours is like most marketing teams, odds are you have no shortage of ideas to keep in line.

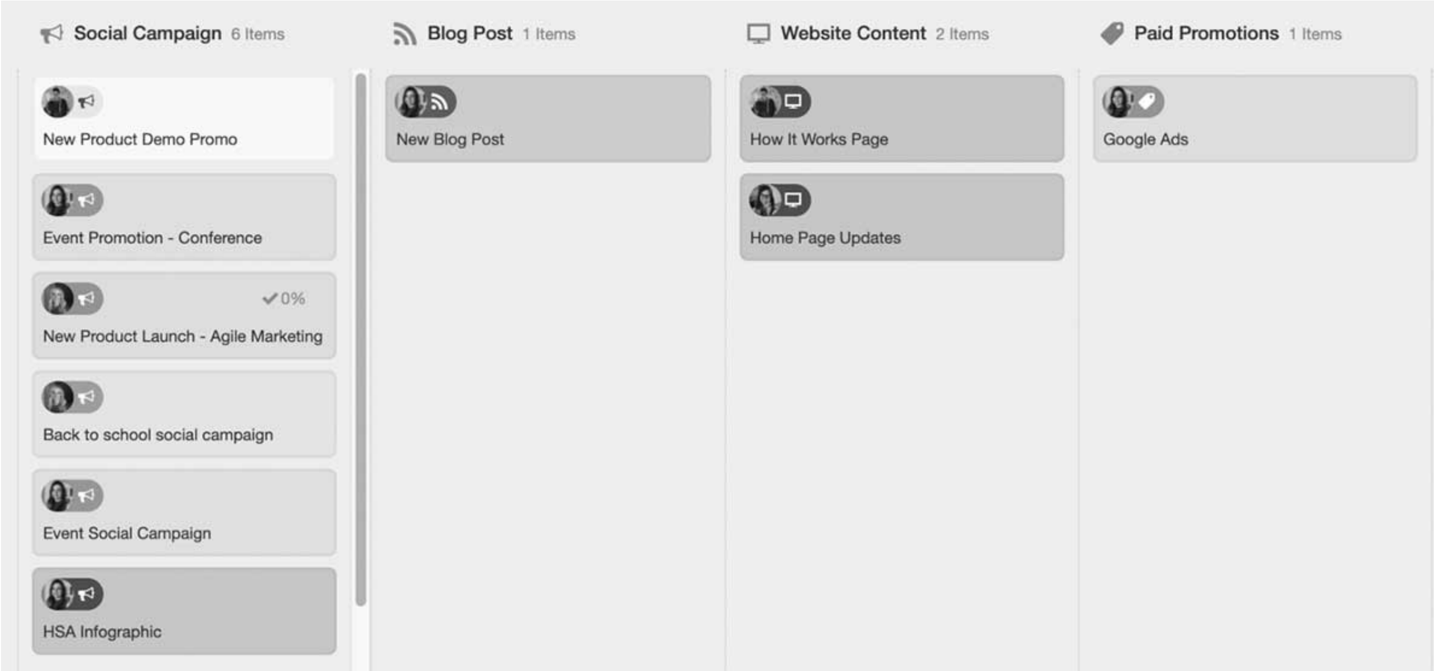
For each idea, jotting down the following is sufficient:

- **Tactic:** A title for the project and a brief description.
- **Owner:** Who's leading this project?
- **Goal:** What do you want this project to achieve?
- **Problem:** What problem does this solve, either for customers, or your business?
- **Story:** Write this as a user story (more on this in a bit).
- **Hypotheses:** How much progress do you estimate this will make toward a specific KPI?
- **Measurement:** How will you measure the success of this project?

Use your project backlog template (this is the same one referenced back in Chapter 2) to list this information for each of your ideas:

| Tactic | Owner | Goal | Problem | Story | Hypotheses | Measurement |
|---|---|---|---|---|---|---|
| *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.* |

Alternately, you can start doing this using the Idea Board (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details) in CoSchedule. It allows teams to create and organize project ideas.



Social Campaign 6 Items
New Product Demo Promo
Event Promotion - Conference
0%
New Product Launch - Agile Marketing
Back to school social campaign
Event Social Campaign
HSA Infographic
Blog Post 1 Items
New Blog Post
Website Content 2 Items
How It Works Page
Home Page Updates
Paid Promotions 1 Items
Google Ads

# Step 2: Writing a Creative Brief

Creative briefs are simple (usually one or two-page) documents that outline the basic requirements for a project. At CoSchedule, every marketing project starts with a brief.

Here is what you should include in the brief (some of this is really just elaborating on items listed in your project backlog):

- **User Story:** Who does this project serve?
- **Project Summary:** A brief description of the project.
- **Top Problem:** What problem does this project solve for your customers? Alternately, what problem does this project solve for your company?
- **Project Goal:** What does this project need to achieve?
- **KPI:** How will success be measured?
- **Project Process:** At a high level, what steps need to be completed for this project?

This document can take any form you'd like. Something written up in a word processing doc or note-taking app probably makes the most sense.

## STARTING BRIEFS WITH A USER STORY

In agile development, a user story is a simple statement that outlines what a user of a product is looking to accomplish. In agile marketing though, the CoSchedule team writes user stories to introduce creative briefs in terms of what the project owner (the person leading the project) would like to achieve.

They're written according to the following format:

> As a marketer, I'd like to [CREATE PROJECT] in order to influence [METRIC].

This format is effective because it clearly establishes what the project is intended to achieve up front. While this isn't a purist approach, it works well for aligning teams behind a common goal.

If you'd like to write user stories in a more traditional format, you can opt for this:

> As a [CUSTOMER PERSONA], I'd like to [ACHIEVE TASK] in order to experience [BENEFIT].

This format keeps your work focused on your customer and may work if you prefer a more traditional approach to agile.

## Step 3: Run a Sprint Planning Meeting

Once a brief has been written, it's time to present it to your team. The best way to do this is with a sprint planning meeting. This is an opportunity to get everyone together who will be working on the project, get everyone on the same page, and plan out what will be required to complete the project.

Since sprints should be fairly short (one to four weeks, but most often planned out into two-week increments), you may only need one sprint for your project. However, for very large-scale projects (like a website redesign, for example), you may need multiple sprints (and you might even need to include more than just your marketing team in that case, too).

Plus, some types of projects (for example, blog posts and spontaneous social media content) might not need to be planned as formal sprints, either. These are things to keep in mind as you proceed throughout this chapter.

### DETERMINING TASKS AND ESTIMATING TIME

First, the team will need to determine which tasks need to be completed for the project.

It's helpful to have each team member contribute their own input, since it's unlikely the scrum master will always know everything that each team member needs to do, or exactly what each task will entail. Use this as an opportunity to discuss what's needed.

Go around the room and ask:

- **What will each team member need to do in order to complete the project?**
- **Which order do those tasks need to be placed in?**
- **How long will each task take?**
- **What is the definition of done for each task (meaning, how will you quantify when a task is actually completed and ready to be checked off as finished)?**

Consider adding a small amount of buffer time per task. This can be a couple extra hours for tasks that will take less than a total of one day, an extra day for things that will take a day or two, and two extra days for anything longer than two or three days. These guidelines are not scientific, but they have worked well for CoSchedule's marketing team when managing projects.

This makes it easier to account for unexpected roadblocks that might derail the project, so you can remain on-time even if something comes up.

### GATHER RESOURCES

Is there anything you'll need to complete this project? This could include:

- **New software or tools.** Do you have what you need to do the work?
- **Contributions from staff outside the marketing team.** Will you need to

involve team members outside of marketing? Make sure they're included in the conversation, so you can get their time to help with your project.

- **Budget.** Can your team afford to execute the project?

## SET DEADLINES

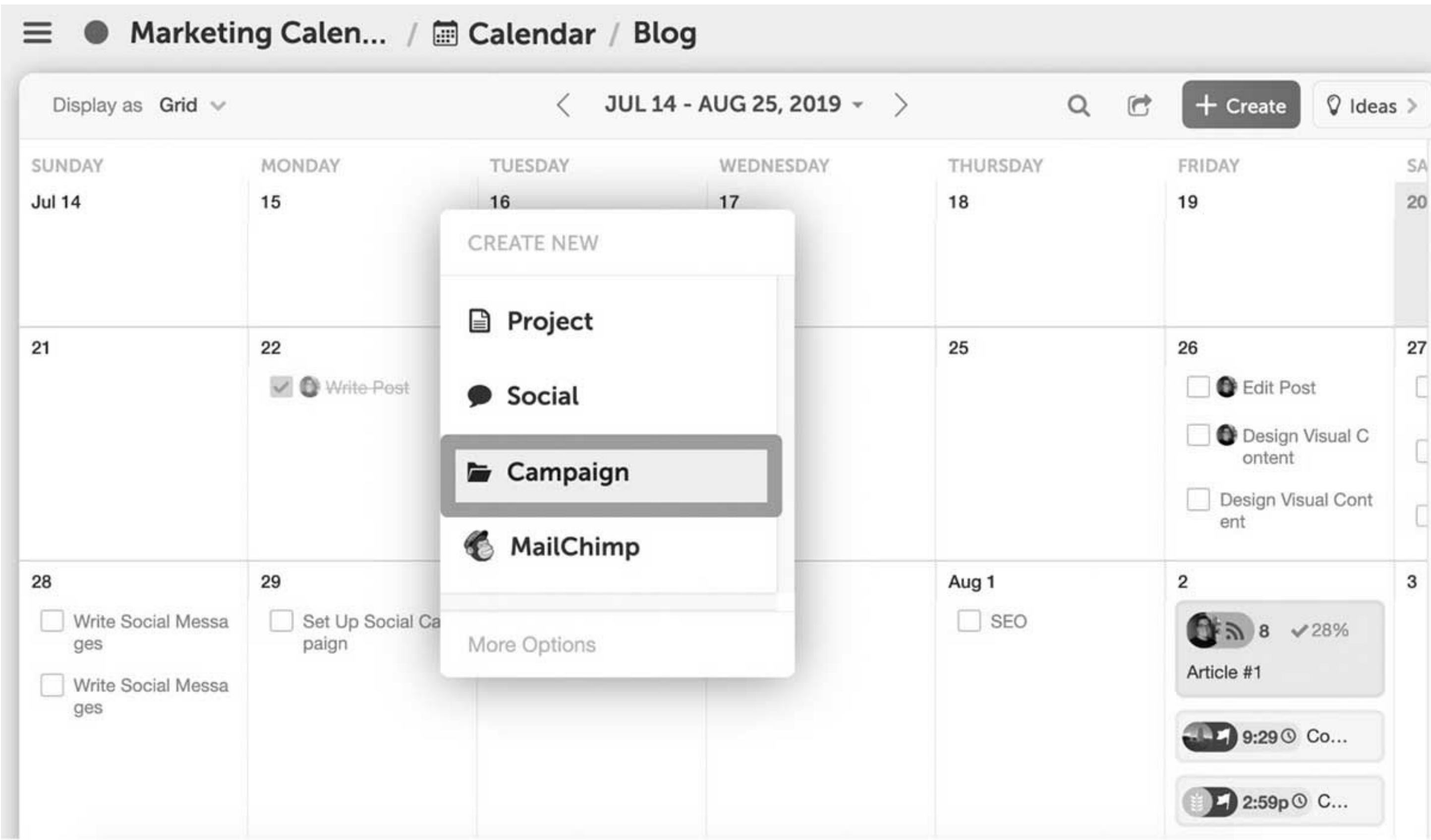
Next, determine when each task will be due. This should be connected to the time estimates the team has provided. You'll assign these tasks and deadlines in the next step.

## Step 4: Plan the Sprint on Your Marketing Calendar

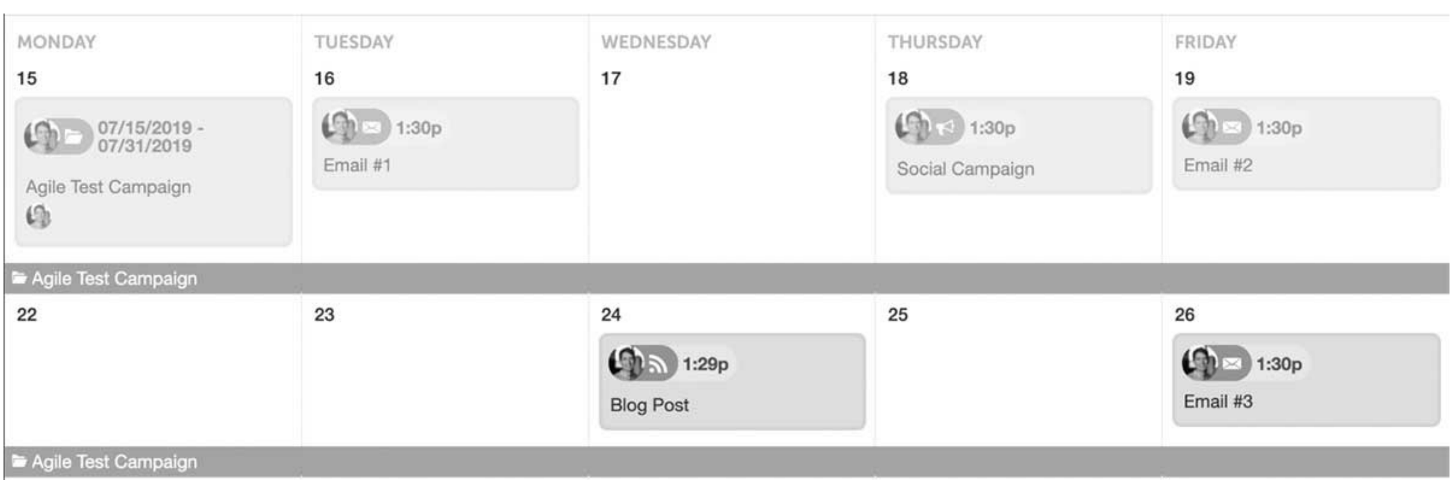
Now it's time to plan all the tasks within your project on your marketing calendar. This is as simple as placing the tasks on the calendar in order, according to the deadlines established during your sprint planning meeting.

CoSchedule customers can do this using the [Marketing Calendar](#) (available on all plans) and Marketing Campaigns (available on Professional and Enterprise CoSchedule plans—[see details](#)).

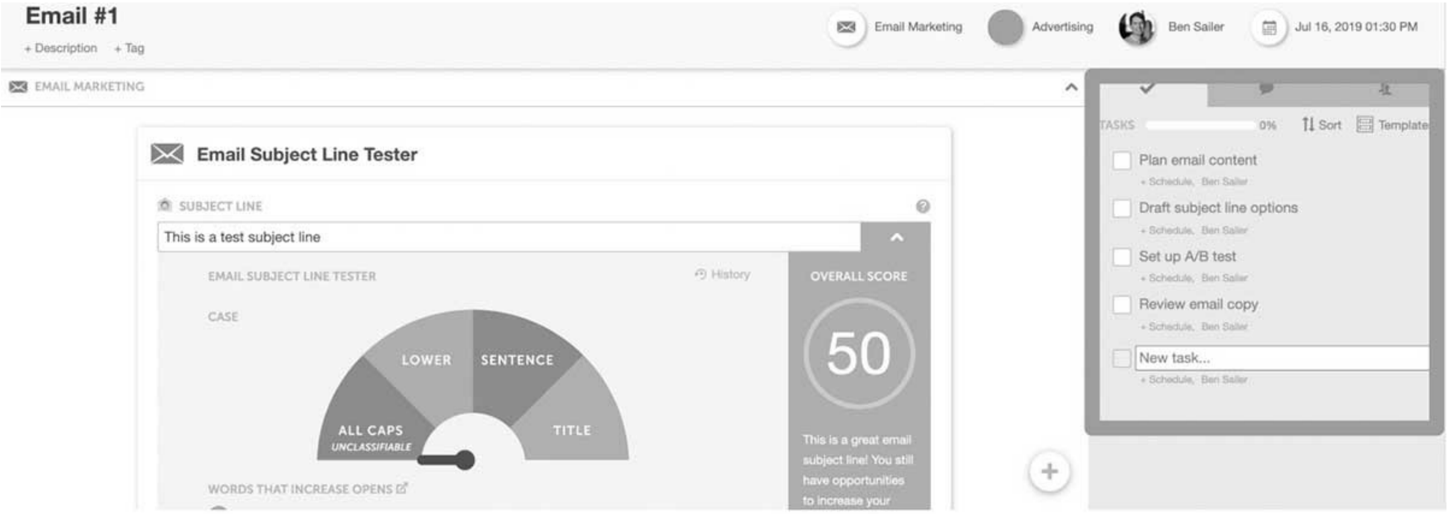
Start by clicking a day on the calendar and creating a new Marketing Campaign:



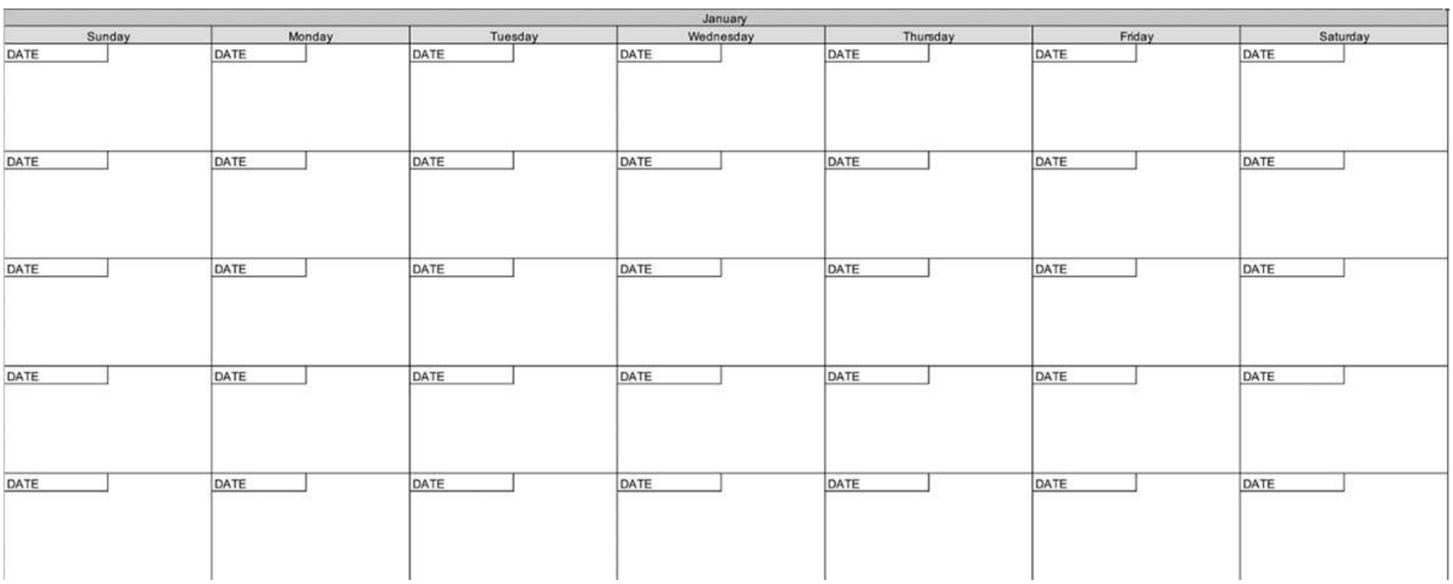

Next, add each project to the campaign (in accordance with the deadlines you established during your sprint planning meeting). Once you're done, you'll see the campaign visualized as a color bar across your calendar:




Then, add Tasks (available on all plans) to each project within the sprint. This will allow you to list every step that needs to be completed, assign them to their respective team members, and manage deadlines effectively. Each time a task is completed, the percentage bar on the calendar will increase.



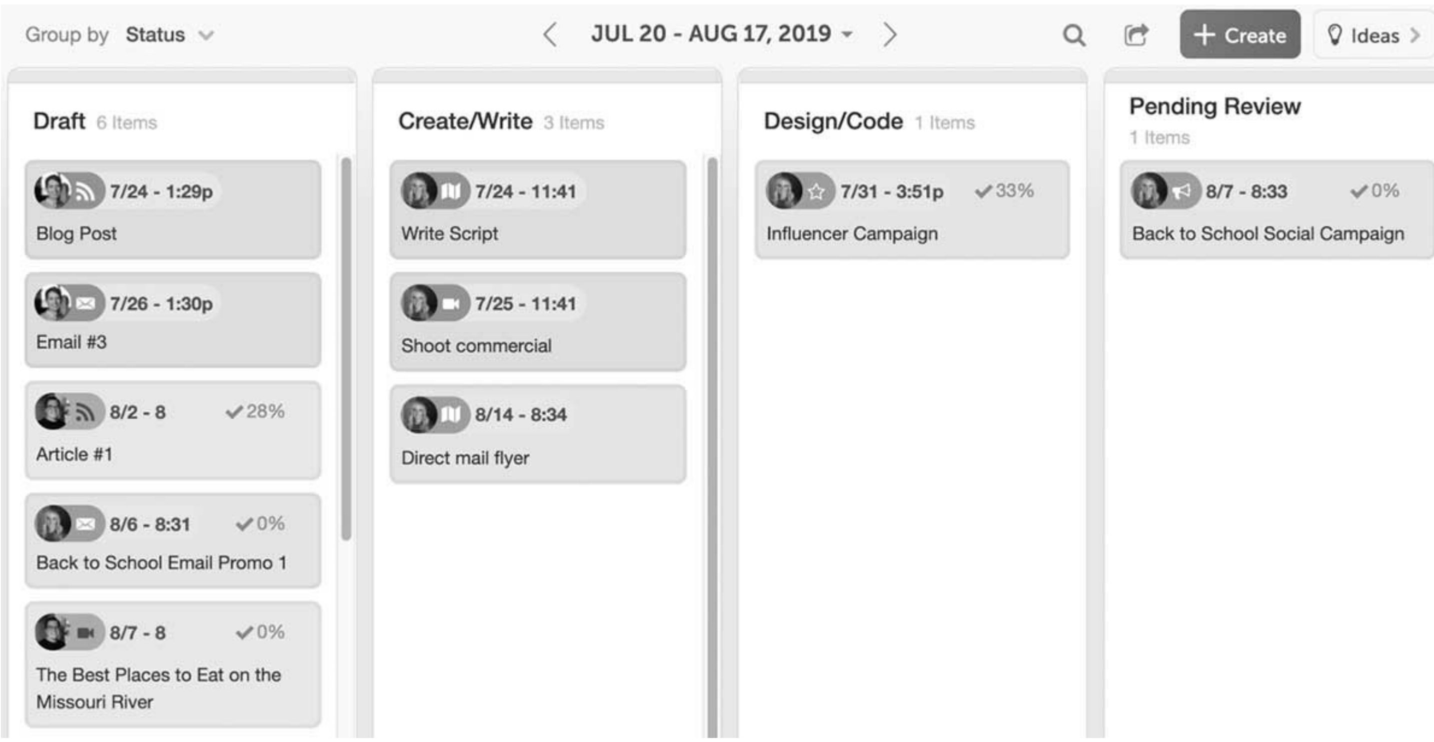

Alternately, you can use the spreadsheet-based marketing calendar template included in the resource bundle for this guide (here’s a look at what you’ll find—add dates, fill in your projects, and upload into your cloud-based office software to create a shareable calendar for your team):



## Step 5: Manage the Sprint With Your Kanban Board

Once the project gets underway, use your kanban board to manage each phase.

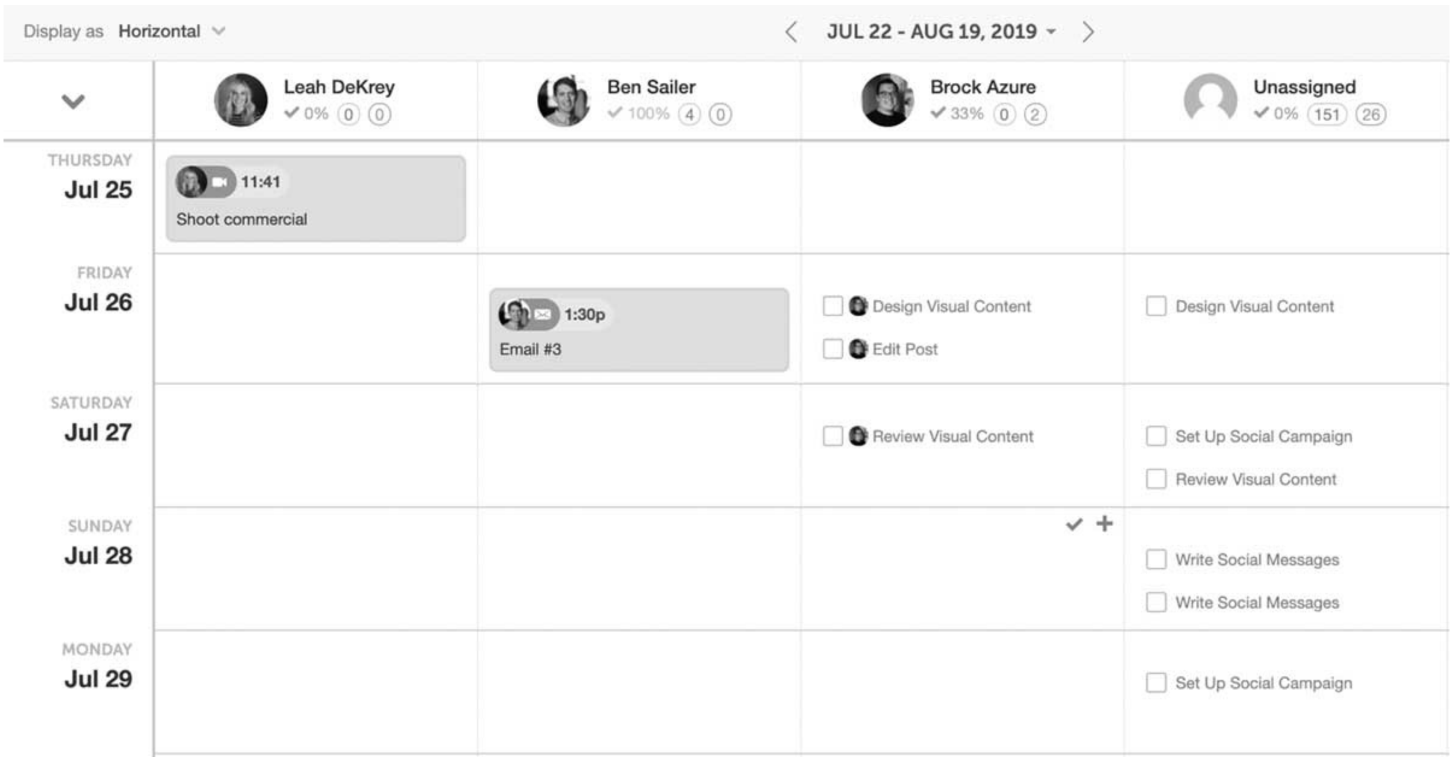
If you're using CoSchedule, the tasks you added into each project within the campaign (as well as all other tasks) before will appear on your [Kanban Project Dashboard](#) (available on Professional and Enterprise [Work Organizer](#) and [Marketing Suite](#) plans—[see details](#)). This allows you to see all your team's tasks and their project phases.



## Step 6: Measure and Track Project Progress Throughout the Sprint

Each morning during your daily standup meetings, pay close attention to how the sprint is progressing. Are steps being completed on time? Are there any hangups preventing it from moving forward? Resolving those issues promptly is key to making this process work.

CoSchedule customers can use the Team Management Dashboard (available on Professional and Enterprise Work Organizer and Marketing Suite plans) for this purpose. All the tasks you've assigned for your sprint are visible here in one place:




This helps you see which work is upcoming and how much has been completed (in traditional agile, this might be called a sprint backlog, which visualizes work that has been completed and how much work is yet to go).

In order to track whether the team is hitting deadlines, you can also use the Team Performance Report (available on Growth, Professional, and Enterprise [Work Organizer](#) and [Marketing Suite](#) plans —[see details](#)).

It tracks and reports on the percentage of tasks each team member completes on time, as well as their overdue task percentage. You can use this information to better understand how workloads are distributed, and better estimate time on projects in the future.

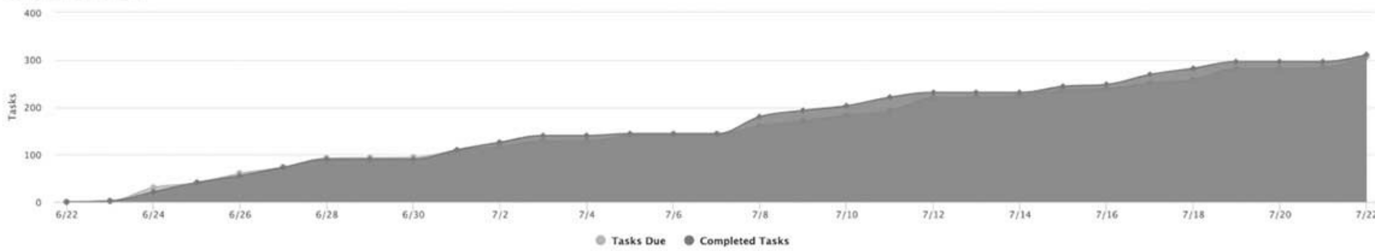
COMPLETION RATE

-1% 95%

302 out of 318 tasks complete

| TASKS COMPLETED ON TIME | TASKS COMPLETED PAST DUE | TASKS OVERDUE |
| --- | --- | --- |
| 67% | 28% | 5% |
| 213 Tasks | 89 Tasks | 16 Tasks |

DUE VS COMPLETED TASKS



# You’re Ready to Plan Marketing Sprints

You’re now equipped with a streamlined process for planning marketing sprints. In the next chapter, you’ll learn how to self-assess the effectiveness of your work with sprint retrospective meetings.

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. When meetings are poorly-run or scheduled without a good reason, they erode productivity and leave everyone feeling frustrated.

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.

The scrum master on your team should facilitate these meetings. Ideally, they should be 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 organizes and displays all the tasks assigned to your team.
- **Organized in Evernote, OneNote, or another note-taking app:** These apps make it easy to store notes and lists for future reference. Evernote integrates with CoSchedule.
- **In a word-processing document or plain text file:** Simple and flexible.

## 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 (in most offices, this likely means using Slack) and enforcing team member attendance (you can 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:

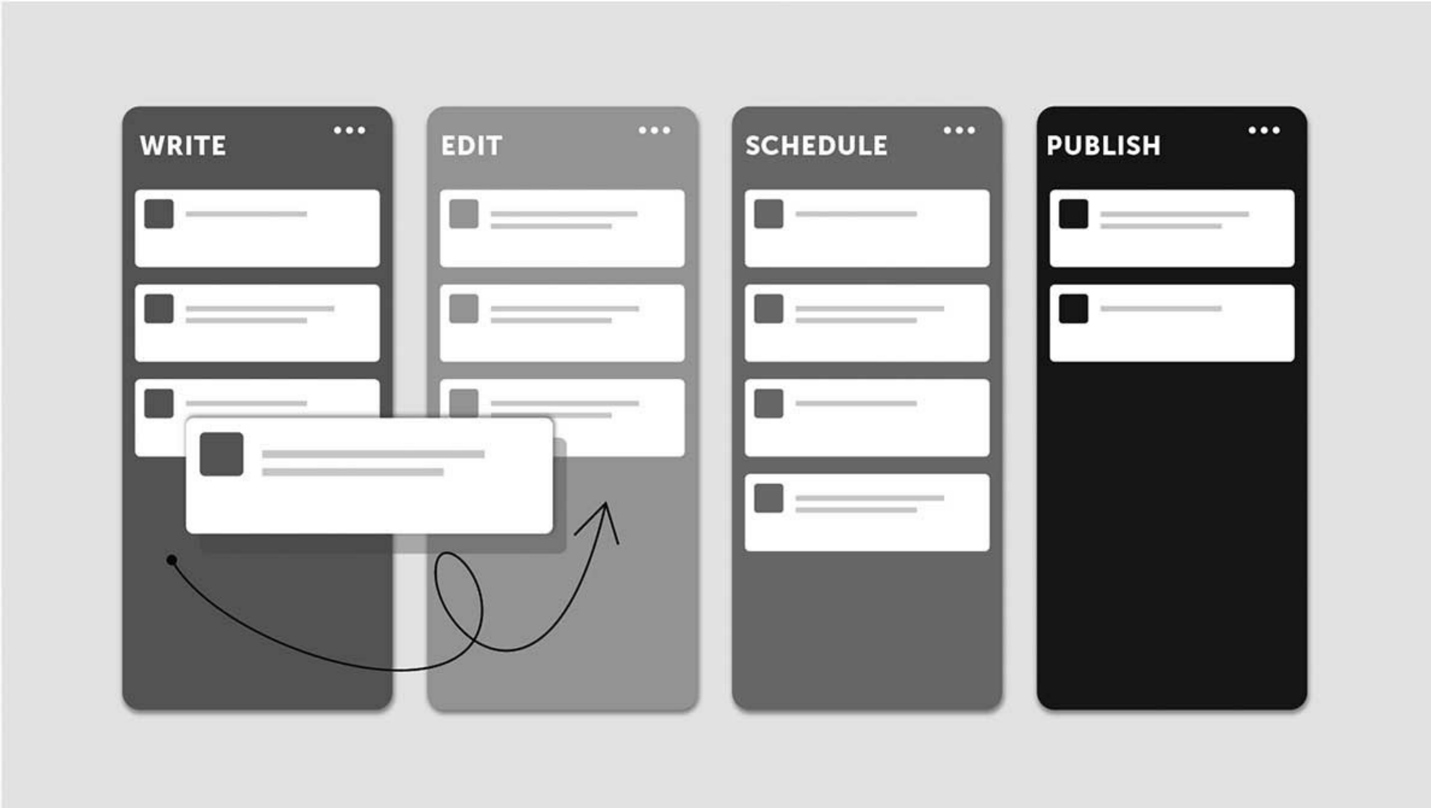
- **Keeping the meeting on track:** Make sure everyone speaks up and goes in turn.
- **Making sure the right projects are being worked on.** And if they're not, redirecting the team toward the correct priority (according to the sprint).
- **Ensuring everyone has what they need to succeed:** If someone 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 physical kanban board, you might hold daily standups in the same room as your board:




Alternately, you might pull open CoSchedule's Kanban Project Dashboard (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details) or another app on a TV in the room. There are other kanban software tools on the market as well. Choose the approach that works best for you.

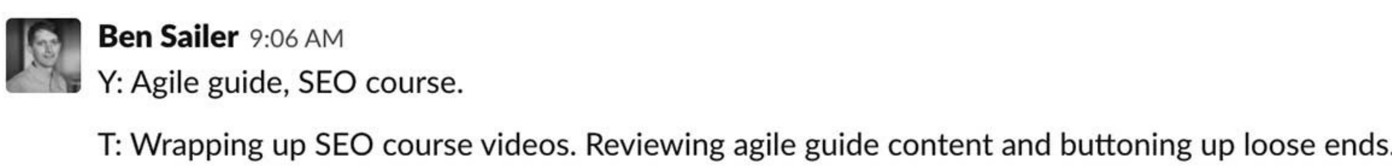
Traditionally, scrum meetings should be conducted in person. But, what if that doesn't work for you (because you're a remote team, or for another reason), or if you feel like breaking the rules? In that case, there's another option: **running standups in Slack**.

The CoSchedule team has experimented with running standups in person and online. Both approaches have worked well.

If you choose to use Slack, start with having the scrum master alerting the team (use one specific channel for this each day):


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

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




If a team member has a roadblock, they tag the scrum master in a message. The scrum master is then responsible for helping that team member to resolve the issue. This is often best done via face-to-face conversation.

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. 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). However, considering the fast-paced nature of marketing, a lack of management workflows can foster chaotic working conditions.

Using **agile workflow management** can help marketing teams overcome that chaos without sacrificing speed. It even makes 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 a defined set of steps required to complete a project. They can be visualized as a series 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, ask, "Ideally, how does this type of project typically flow from start to finish?"

This can be different for different types of projects.

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

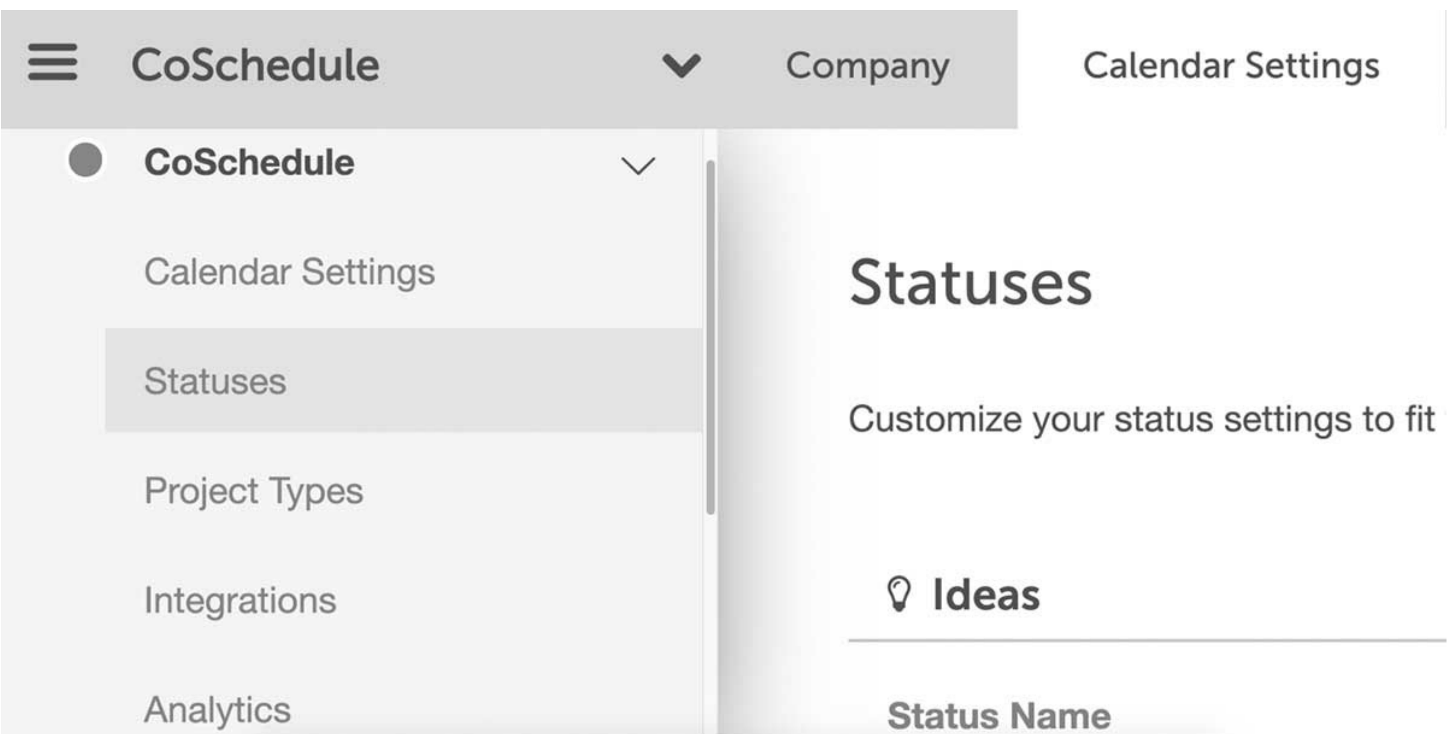
You get the point. Most types of marketing projects can be broken down into execution, review, and ship stages. What changes is simply the verbiage from one project type to the next.

## USING TASK AND PROJECT MANAGEMENT TOOLS TO PLAN WORKFLOWS

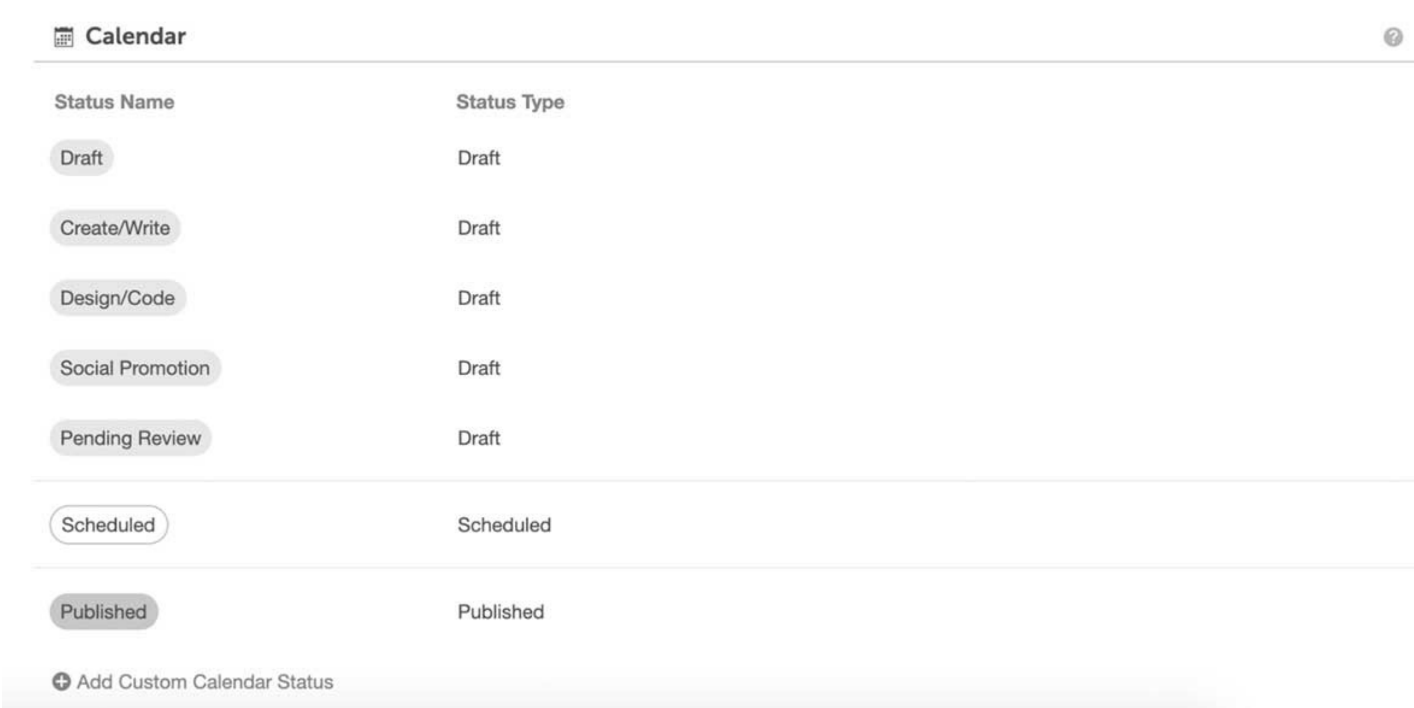
Supporting effective workflow management requires using the right tools. Whether you use task management software, a project management platform, or another type of tool, managing agile processes is easier when you have what you need to get the job done.

If you choose CoSchedule to organize your marketing, you can use Custom Statuses (available on Professional and Enterprise Content Organizer, Work Organizer, and Marketing Suite plans—see details) to manage workflows on every project. They allow you to set customized status labels that match the actual stages of your workflow.

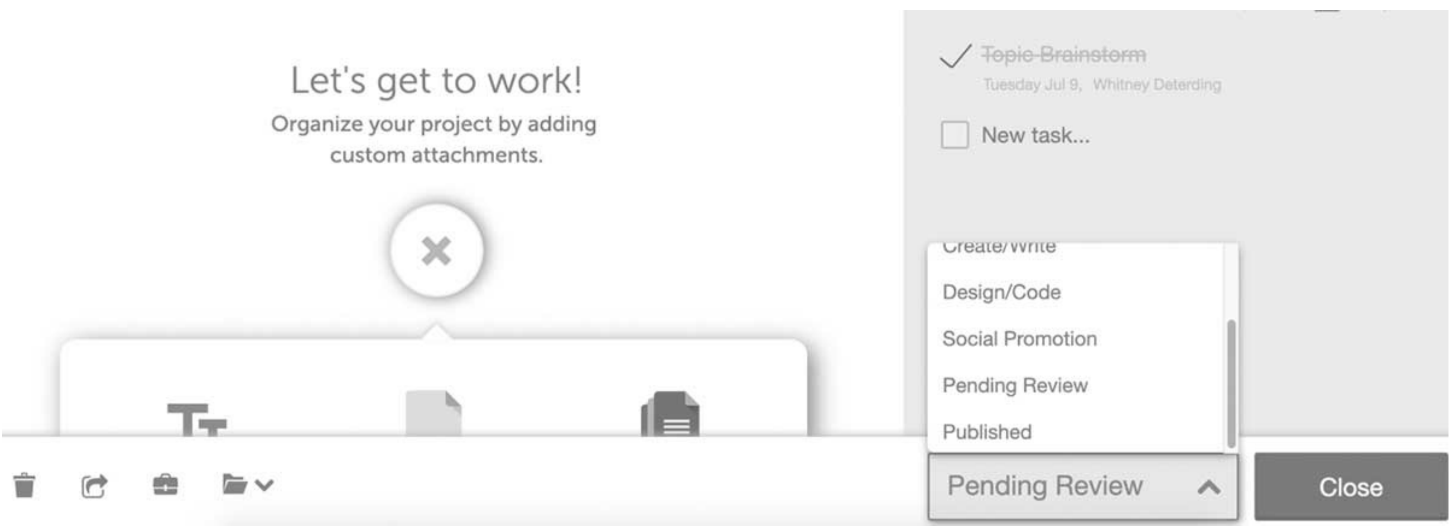
To get started, find the Custom Status option under Settings:




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 Pending Review):




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.

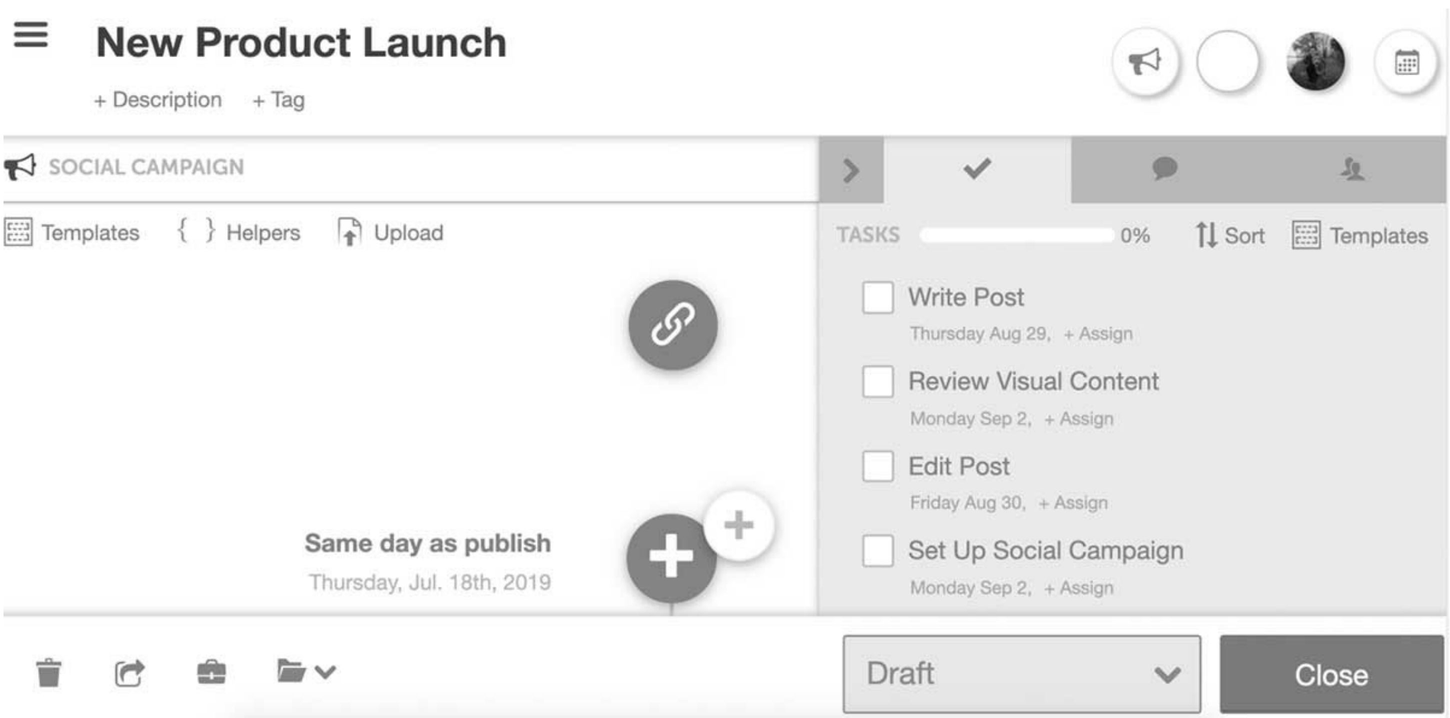
This is where having your team use checklists can be useful. While using checklists isn't necessarily core to executing agile processes correctly, they remain a useful tool that CoSchedule's marketing team swears by.

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

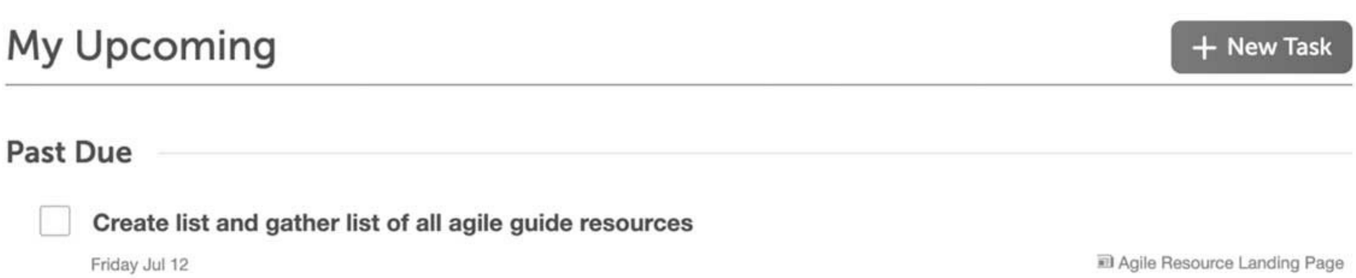
- List every step required to complete the project.
- Assign a role or team member to each step.
- Determine how long each step should take to complete.

Then, map these out to a checklist (using a spreadsheet, Evernote, or another tool).

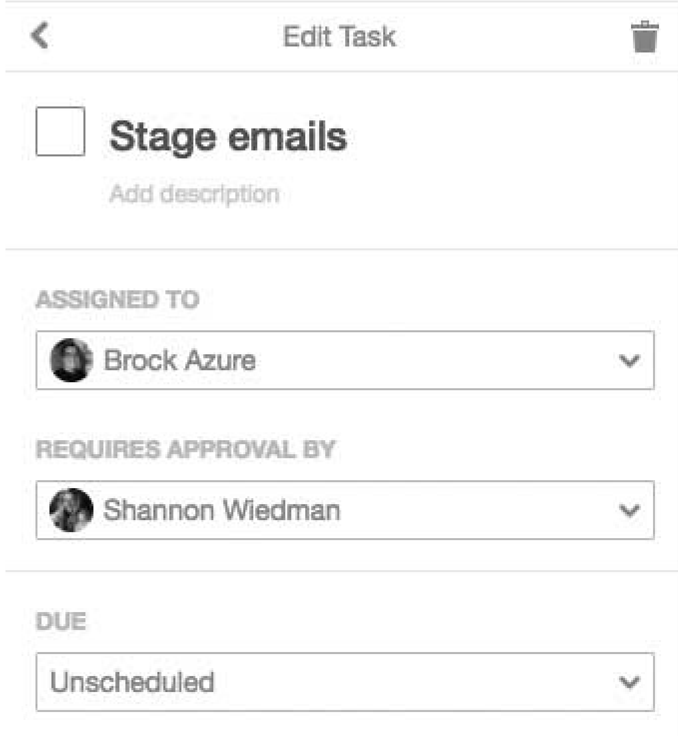
Alternately, CoSchedule supports checklist creation using **Tasks (available on all plans) and [Task Templates](#)** (available on Growth, Professional, and Enterprise [Work Organizer](#) and [Marketing Suite](#) plans—see details). Lists of tasks can be created for each project individually, or they 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). Team members will receive an email and a notification in their [CoSchedule dashboard](#) when each task is due:



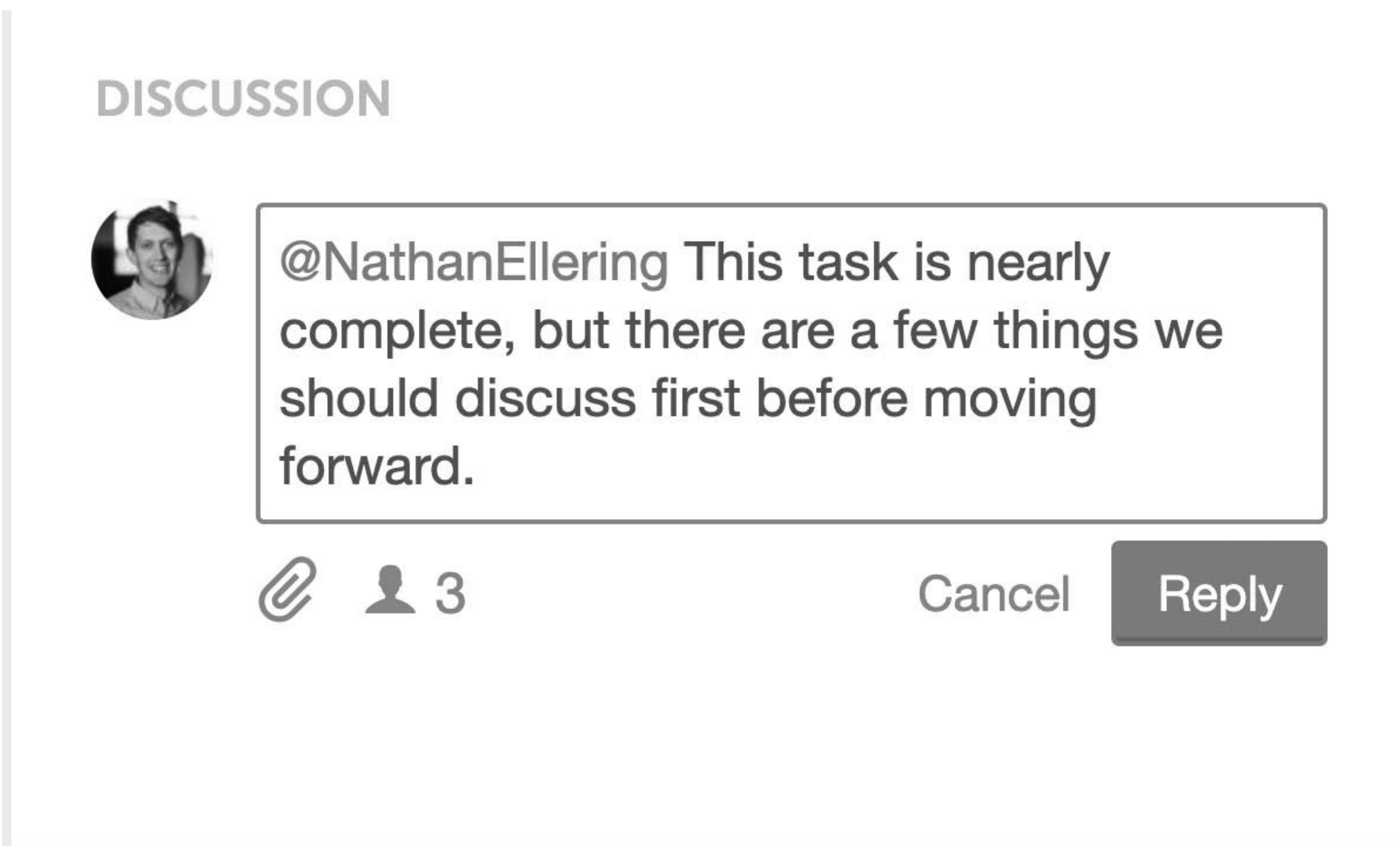

You can also set **[task approvals](#)** (available on Professional and Enterprise [Work Organizer](#) and [Marketing Suite](#) plans—[see details](#)) for steps that need to be reviewed by a manager before confirming they're complete.




## 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 (available on all plans)]**.

Click into a Task in an applied Task Template, then scroll down briefly to find Task Discussions:



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. 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. This is addressed in the next chapter.

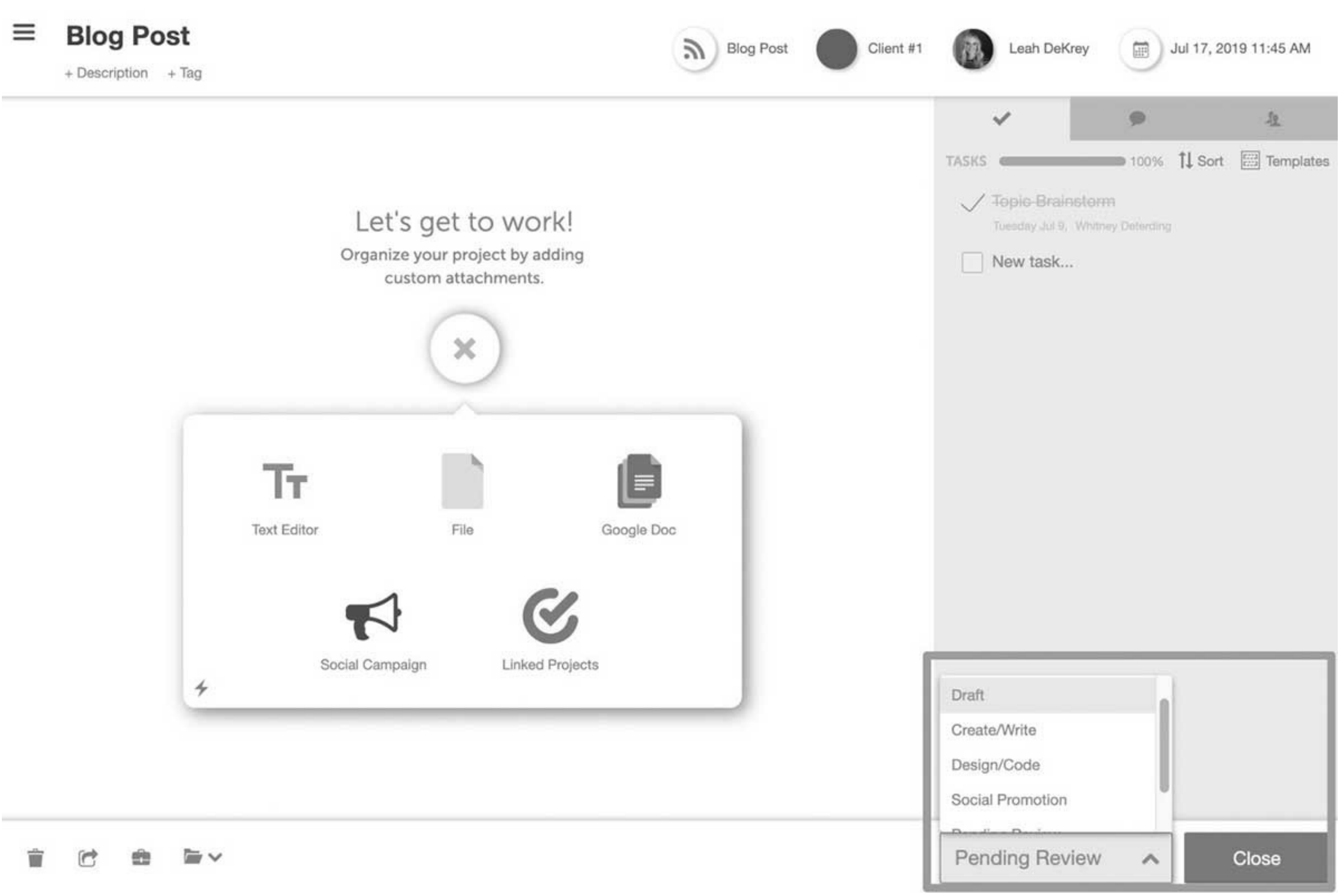
# An Example of an Agile Marketing Workflow Put Into Practice

To better visualize how this process works from start to finish, it's helpful to 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 project are:

- **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:** The article is now live.

That's a straightforward series of project statuses for creating a piece of website content. To begin, a writer starts researching their topic and keywords they'll use on the page. Using Custom Statuses in CoSchedule (available on Professional and Enterprise Content Organizer, Work Organizer, and Marketing Suite plans—see details), they set the status to Draft, which helps others on the team know what phase the project is at:



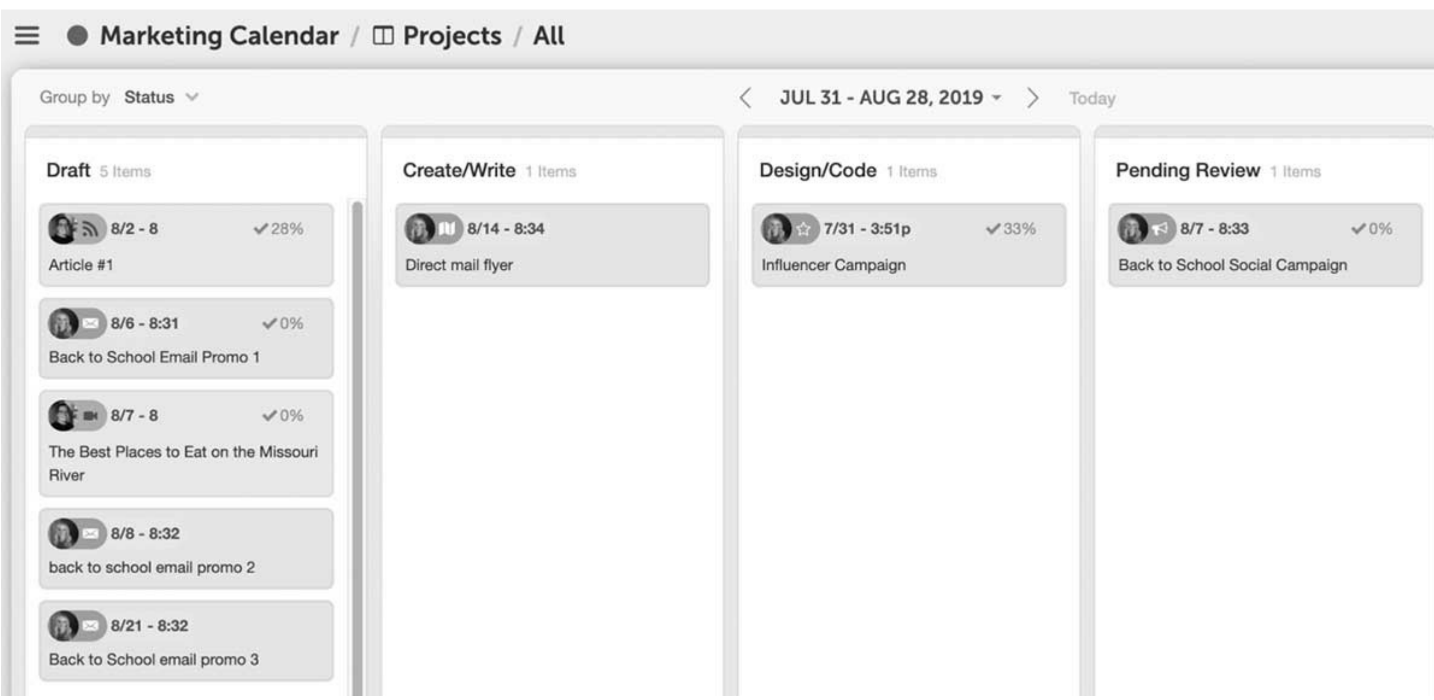

This status has several tasks that need to be completed before it can be considered done. These include:

- 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 (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details) and filtering by Status will move this over to the next column:




At this point, the next person (perhaps an editor or content manager) needs 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.

Then, the process continues. Now, a graphic designer should be ready to create the graphics for the page. Their tasks at the Design stage might include:

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

Finally, a writer or web developer might push the page live. At this point, the status would be changed one last time to Published.

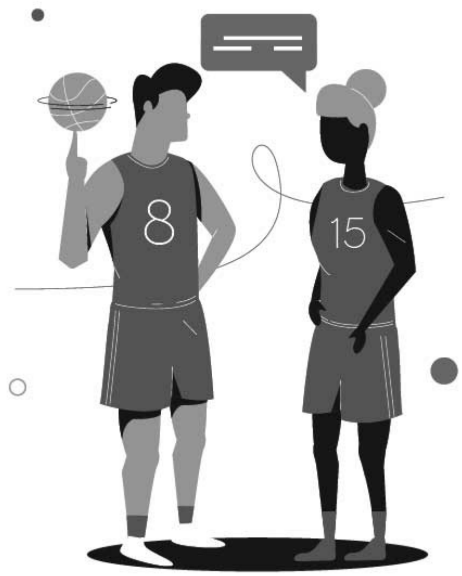
## Now You're Ready to Master Agile Marketing Workflows

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*



At the end of a sprint or project, 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 an opportunity to review performance and suggest improvements for 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 that evaluating performance becomes a habit. This way, the team will stay focused on continuous improvement, rather than making evaluating performance a “sometimes” thing that 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:

- **What went well?** Celebrate your successes.
- **What didn't go well?** Be honest with your failures.
- **How can we improve in the future?** Accept failure as an opportunity to do better.

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 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, all fair and reasonable feedback should be considered.
- **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 so nothing gets lost).

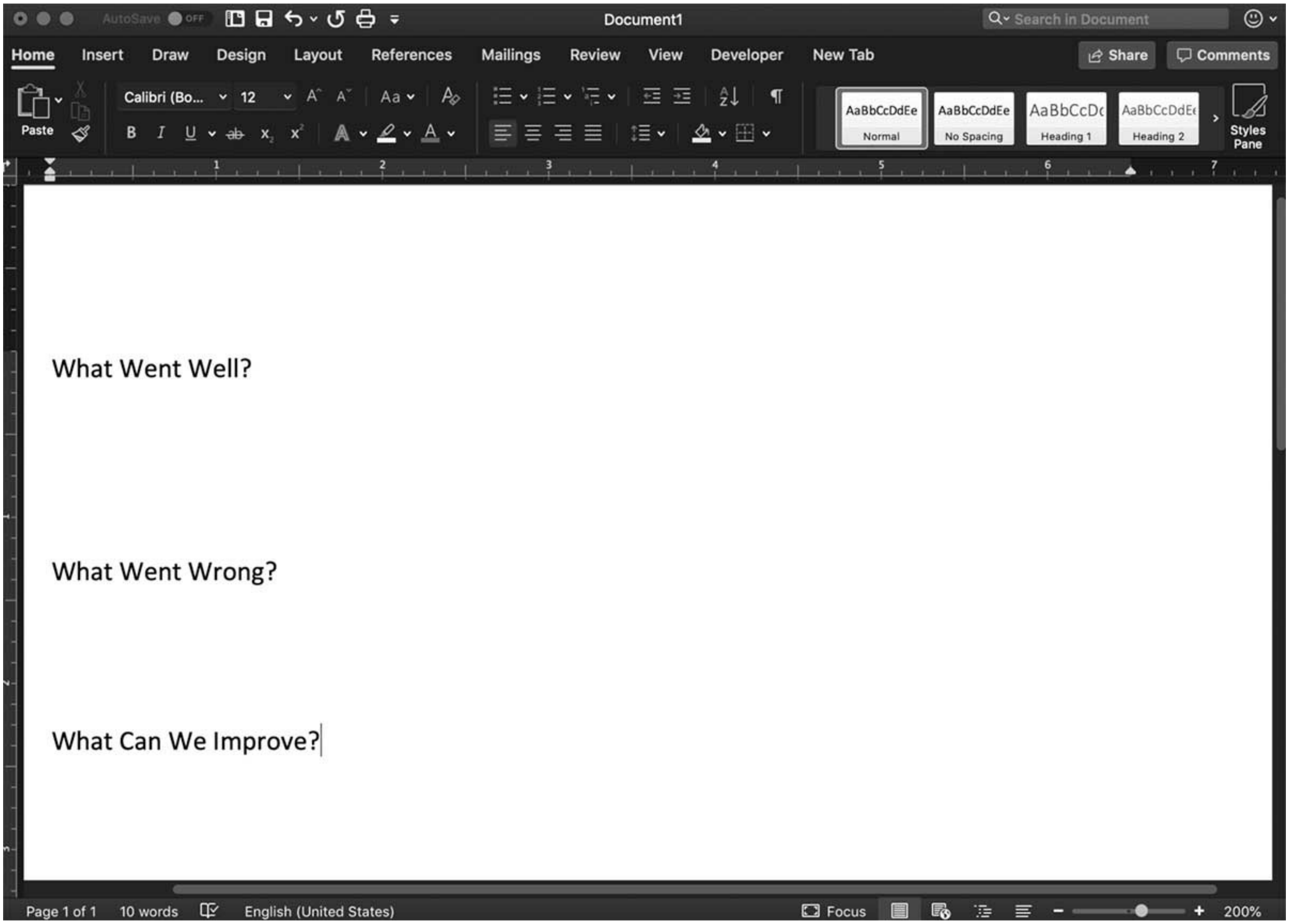
Once you are set up, here are a few useful tips worth keeping in mind:

- **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).

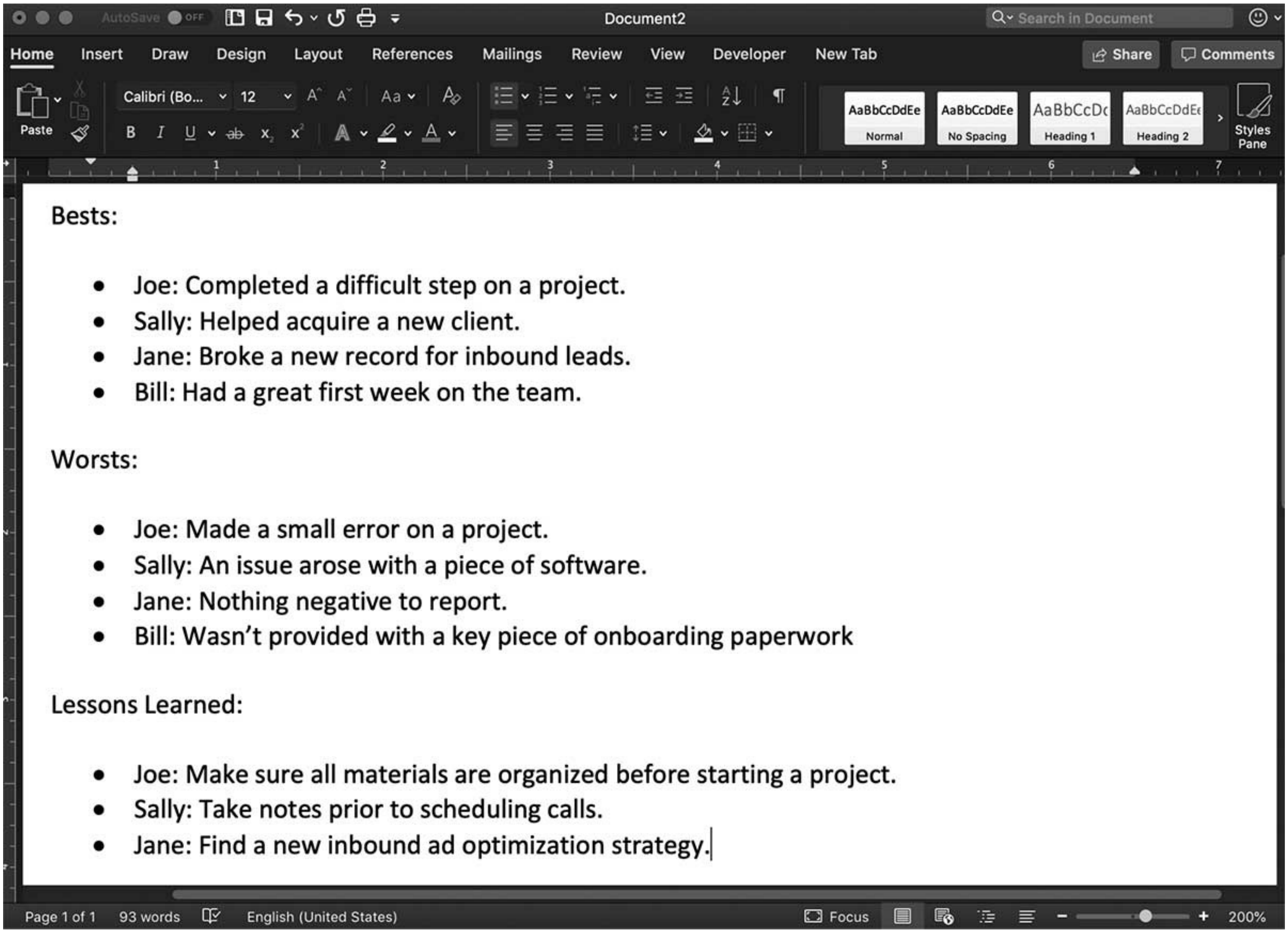

While this discussion is happening, the scrum master should be documenting key points and taking notes on the discussion. These points can be summarized, but should not leave out important details.

## ADDING ANOTHER MEETING: THE WEEKLY RETROSPECTIVE

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

This meeting is very similar to a traditional sprint retrospective. The difference 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 from 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, 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 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?** 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 you need to acquire? New tools? More people? Trading a current tactic to execute a different one?

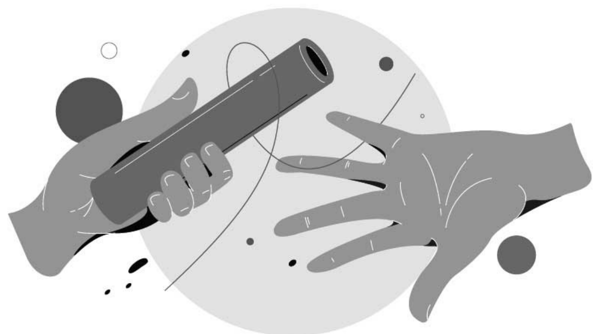
Let's say you decide to move forward with making an improvement to an existing process. For the sake of this example, say you'll start reviewing email newsletters before you publish them. This is something you can start doing right away simply by assigning a team member to review copy. Next time you 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. Hopefully, you’ve found it useful, and will consider bookmarking it for future reference. With that, congratulations in advance on transforming your marketing team, one sprint at a time.

CHAPTER 8

# How CoSchedule Supports Agile Marketing



This guide has given you a basic understanding of how to implement agile marketing (incorporating CoSchedule along the way). But it hasn't covered everything you can accomplish with the CoSchedule marketing suite to complete more work, deliver projects on time, and prove the value of your team's work (all while supporting agile processes and workflows).

That sounds good, right?

In this chapter, you'll find a high-level summary of how to develop agile marketing practices using CoSchedule. It will provide your team with a start-to-finish process you can begin implementing right now.

# Building Your Sprint Backlog

Everything starts with your project backlog.

This is a repository of project and campaign ideas that you'll execute in the future. It ensures drafts and concepts are effectively organized so they don't get lost to the sands of time.

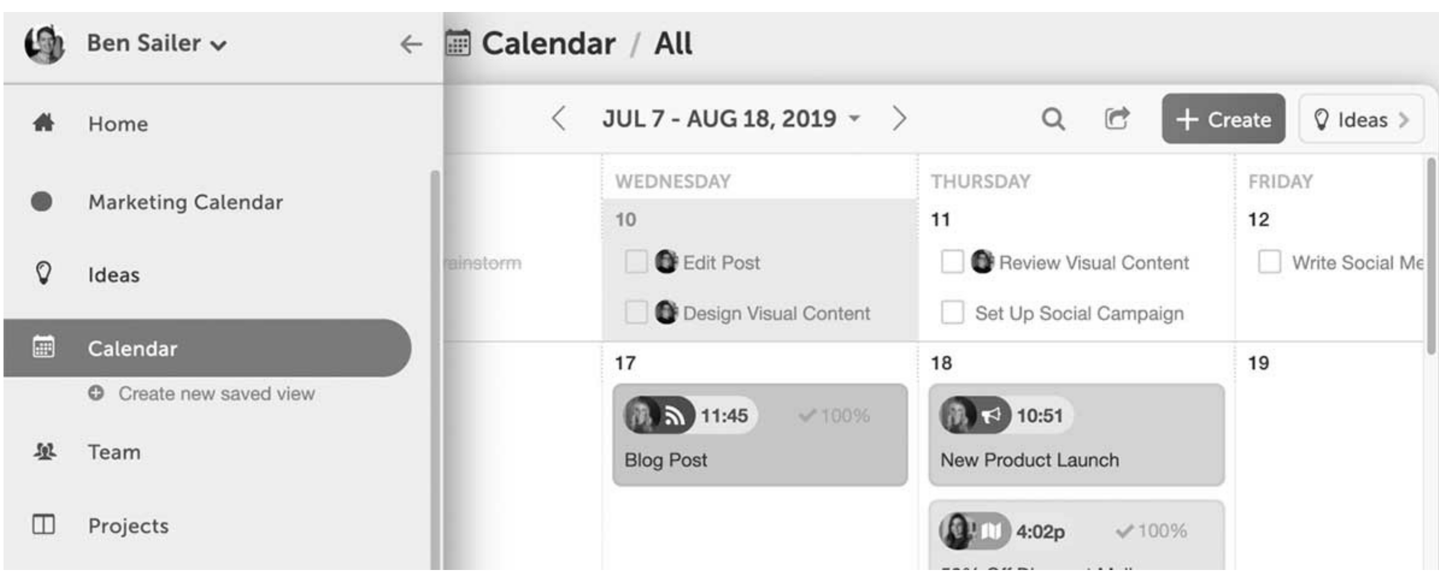
Typically, a sprint backlog looks like a list of ideas in a spreadsheet:

| 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 (last 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 | | |

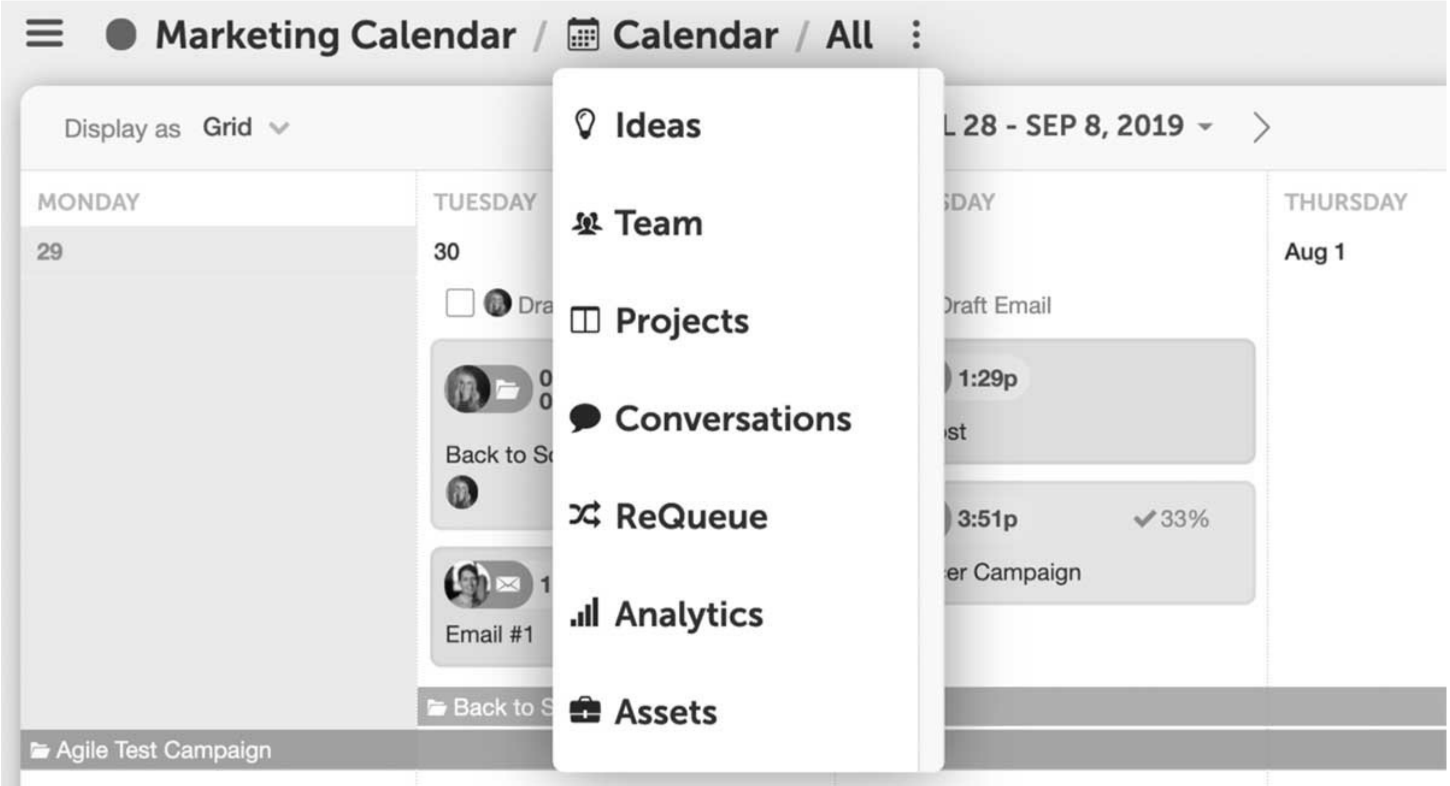
However, CoSchedule's Idea Board (available on Professional and Enterprise [Content Organizer](#) and [Marketing Suite](#) plans—[see details](#)) offers significantly more flexibility and ease-of-use for managing sprint backlogs. Here's how it works for sprint planning:

- **Manage and automate inbound requests.**
- **Brainstorm campaign and project ideas.**
- **Place your ideas on the Idea Board.**
- **When you're ready to work on a project, drag it onto the Marketing Calendar.**

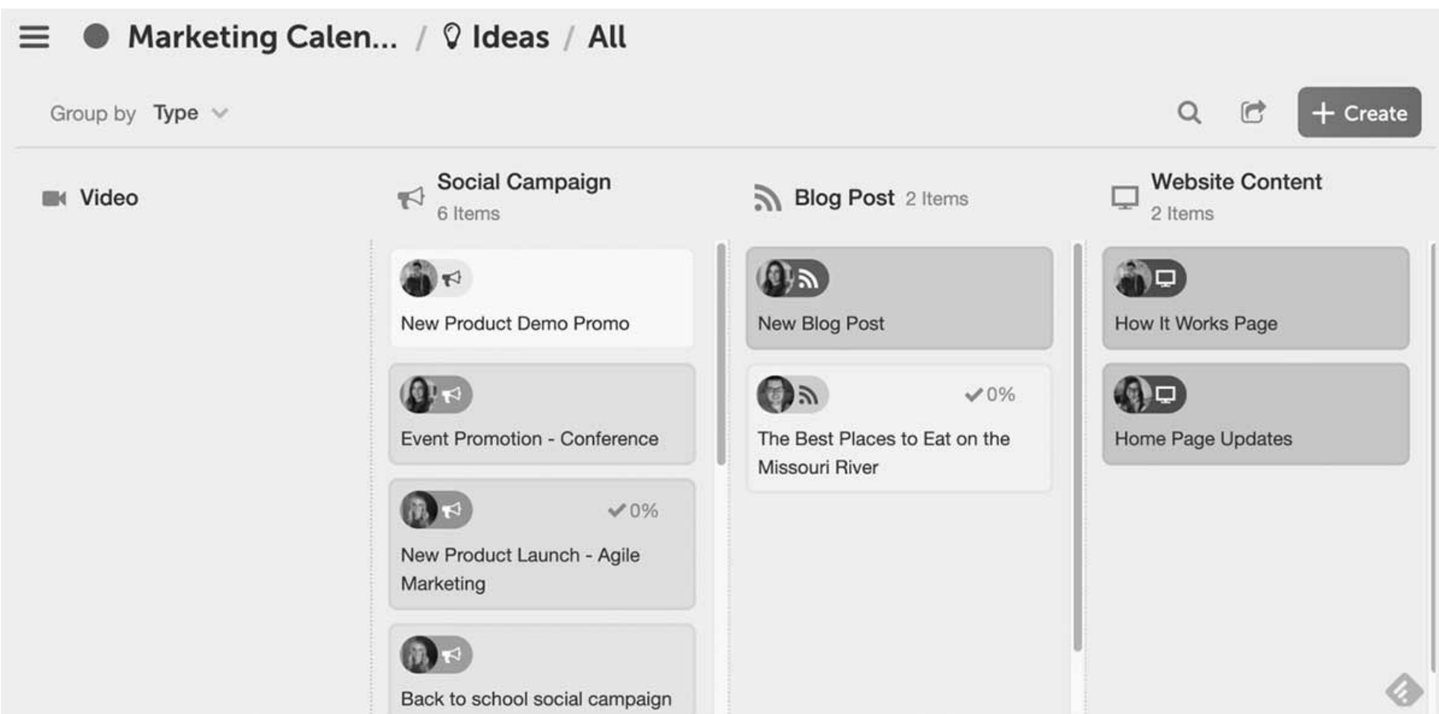
You can access the Idea Board from the left-hand navigation in the app:




Alternately, you can navigate to the Idea Board using the breadcrumb navigation:



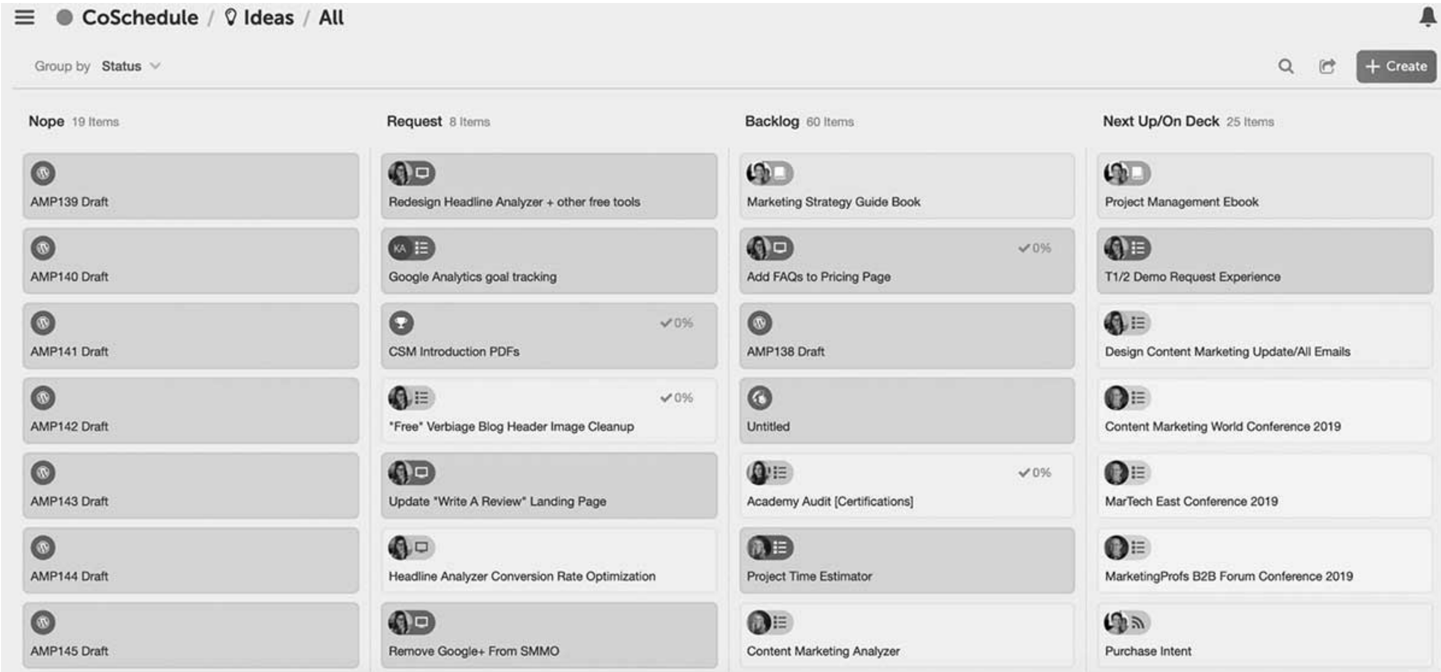

Here, you can now see all your Ideas, which can be filtered by Type, Color Label, Status, or Team Member:



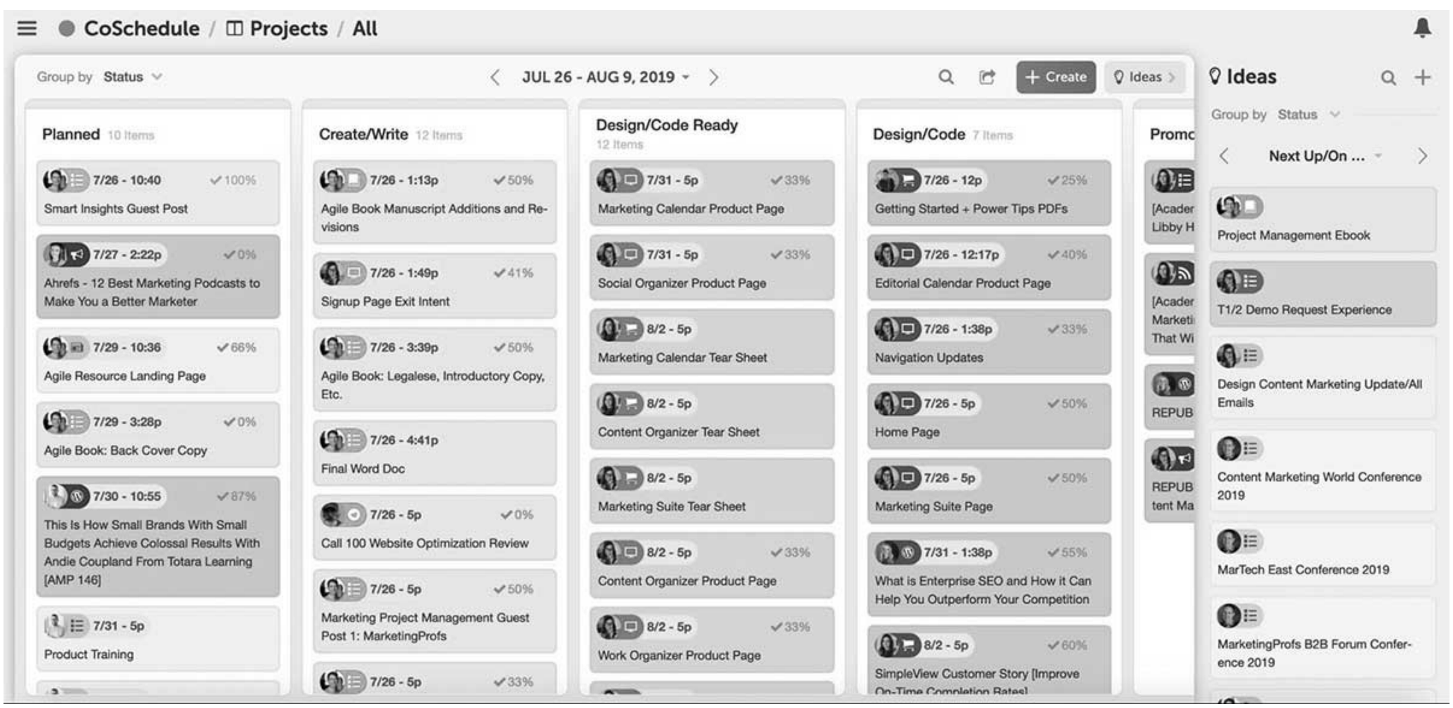

Here is a high-level agile project management process:

1. Automate inbound requests to using your Idea Board.
2. Conduct weekly or monthly meetings to triage these requests like this:
    1. Notice the column status' (add a gif to show the drag/drop to reorder from column).

2. Stack rank based on priority within a column.
3. Drag it to schedule it.




During your planning & prioritization process, manage your next up project in the Kanban Project Dashboard (available on Professional and Enterprise [Work Organizer] and [Marketing Suite] plans —[see details]), like this (drag/drop a project from Next Up within the Idea Bin and put it into the respective status on the Project board):




In your scrums, use the Team Management Dashboard as your framework to ask each team member these 3 questions

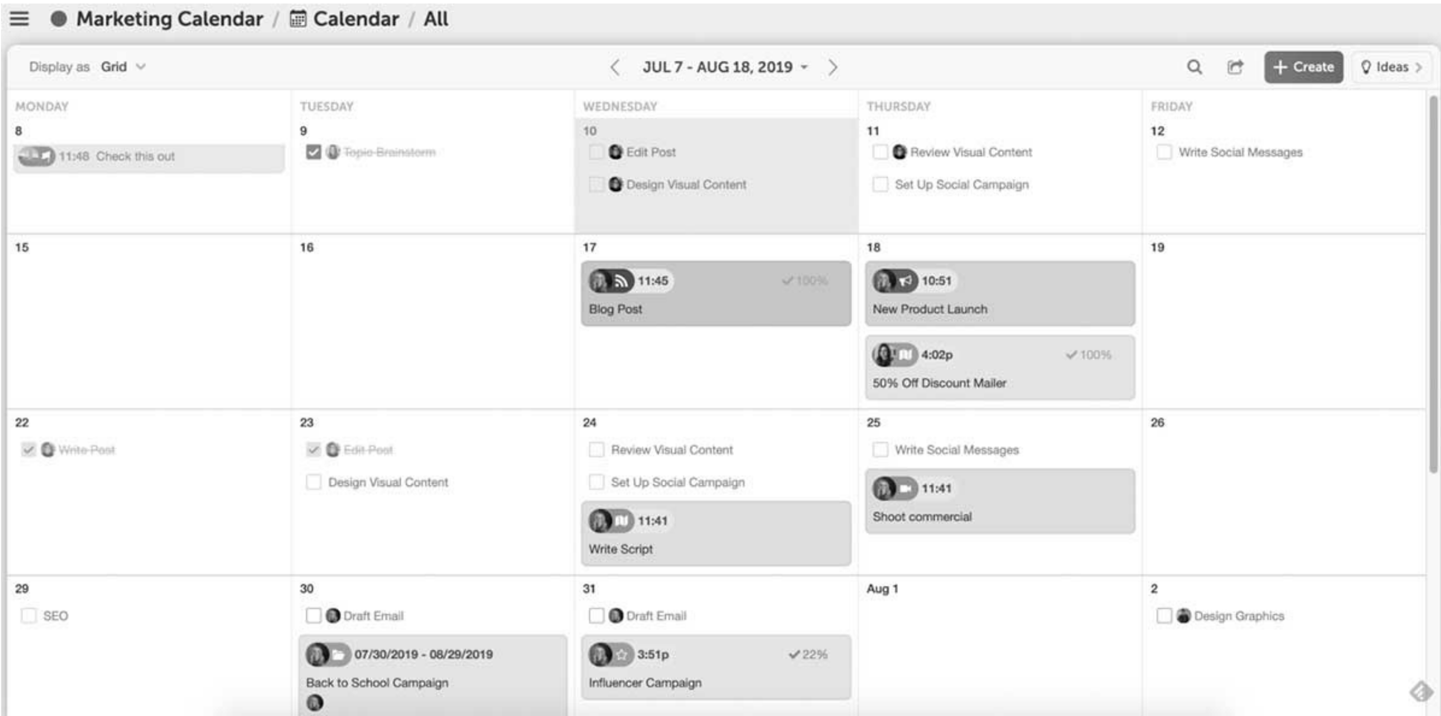
- **What did you do yesterday?** (based on their response, update the projects & tasks in CoSchedule)

- **What are you doing today?** (based on their response, update the projects & tasks in CoSchedule)
- **Do you have any roadblocks?** (based on their response, update the projects & tasks in CoSchedule, which could involve re-prioritizing, assigning or shifting your roadmap)

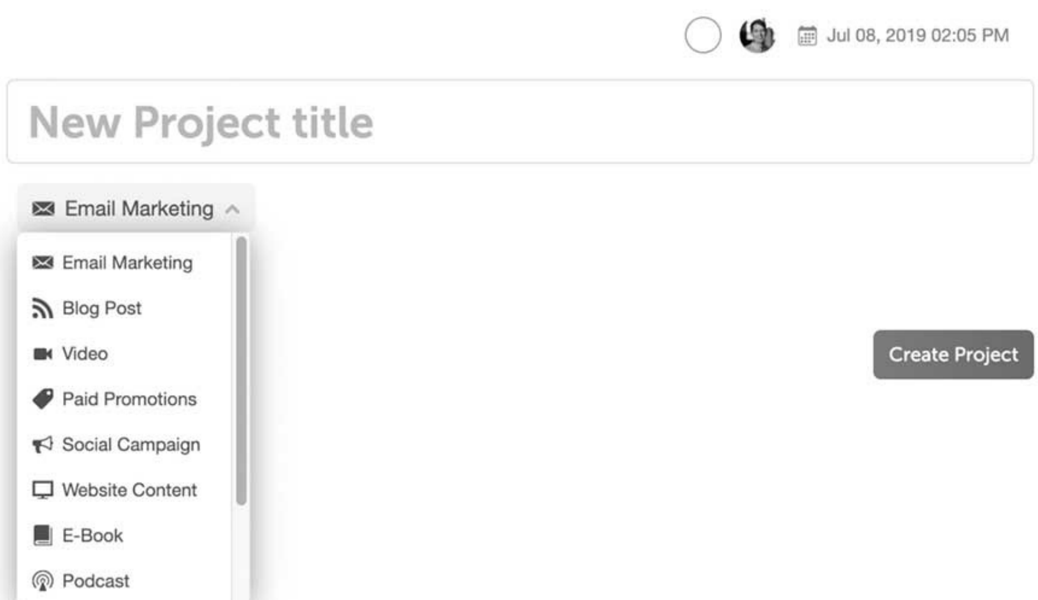
After your scrum, your Calendar and Project Boards will be updated automatically based on the details you've added/revised during your scrum

# Visualize Work With the Marketing Calendar

Moving those projects onto the Marketing Calendar helps your team see everything that's being worked on. With this sort of global visibility, you can work with one version of truth, eliminating duplicate work, removing ambiguity around deadlines, and managing work more easily.



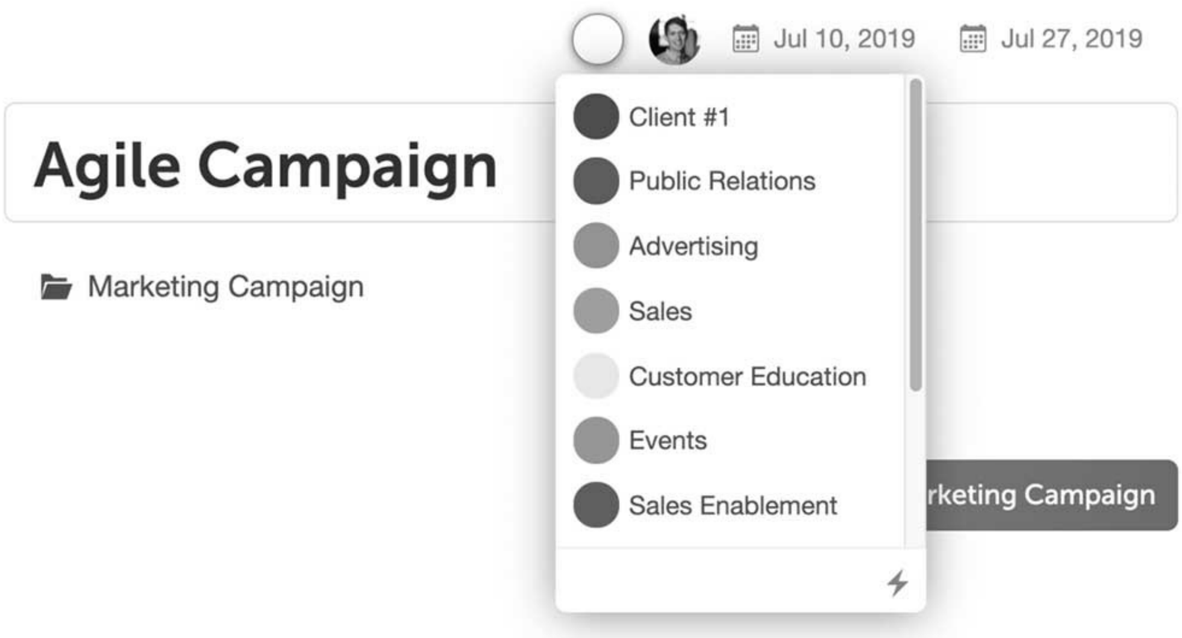

You can also add projects directly onto the calendar by clicking on a given day and choosing a project type (which are customizable to match the work your team creates). You can also click the Create button in the upper-right. This will present you with the following screen:



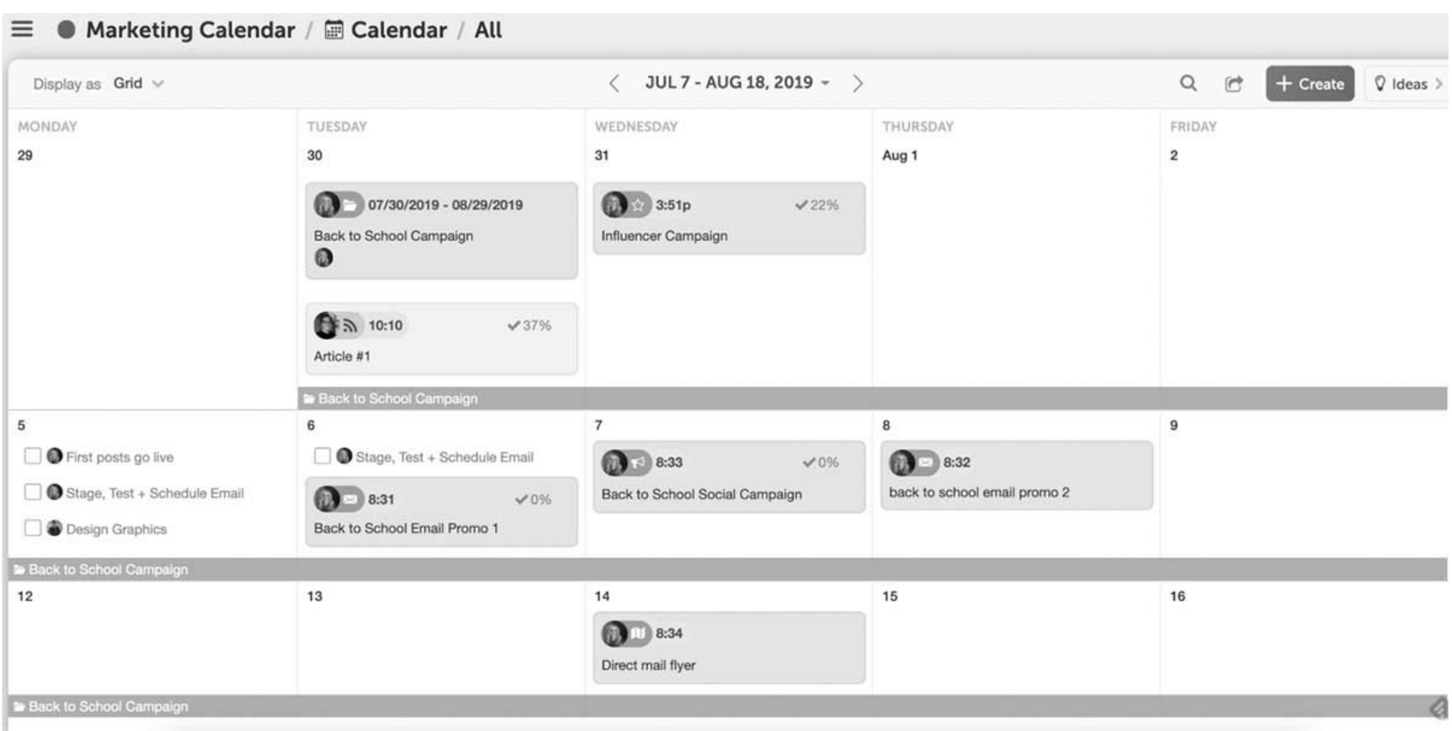
# Map Out Multiple Projects Into Sprints On Your Calendar

If you're planning a sprint with multiple pieces (for example, a campaign with various different deliverables), use Marketing Campaigns (available on Professional and Enterprise [Marketing Calendar]() and [Marketing Suite]() plans—[see details]()) to keep them all organized.

Start by creating a new project on the calendar and selecting Campaign. You'll be prompted to give your campaign a title, color label, and a start and end date:

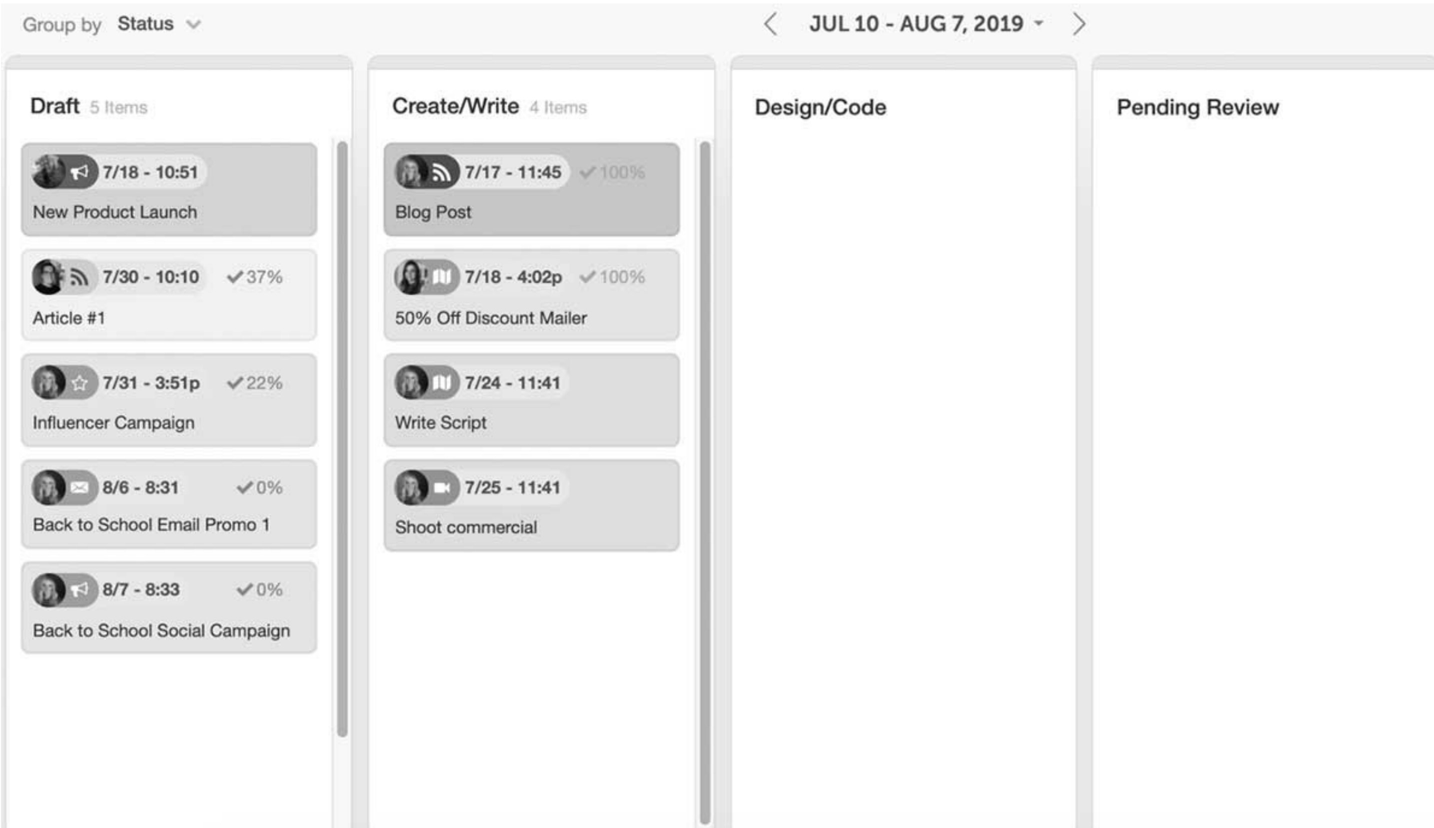



Next, add each piece to your campaign, which will be visualized as a bar on your calendar (you can add as many as you need to map out all your sprints). Clicking into a campaign will display only the pieces that are associated with that campaign, so you can see exactly what you need:



# Manage Projects With Kanban Project Dashboard

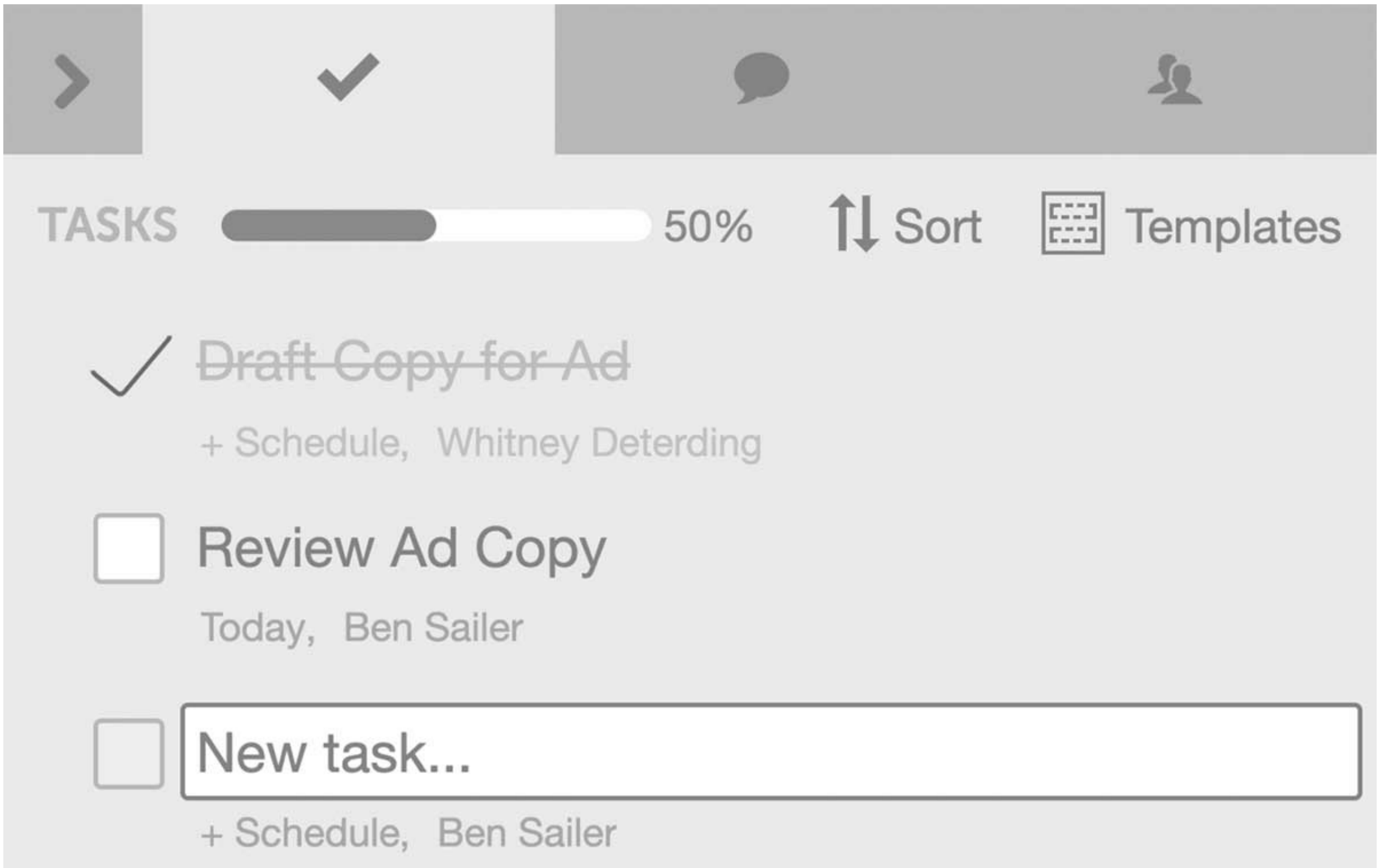
Next, you can manage projects using Kanban Project Dashboard (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details). When used with Custom Statuses, you can see every project that is each phase of completion, and move them to the right as they progress through each step:



# Plan and Implement Agile Workflows

Within each project on your calendar, you'll need to implement a workflow. And workflows are easier to implement when they're consistent.

That's where Task Templates (available on Growth, Professional, and Enterprise Work Organizer and Marketing Suite plans—see details) enter the process. They make it easy to build out checklists that you can apply with a few clicks. In addition, they can be set up to automatically assign tasks and deadlines to team members.

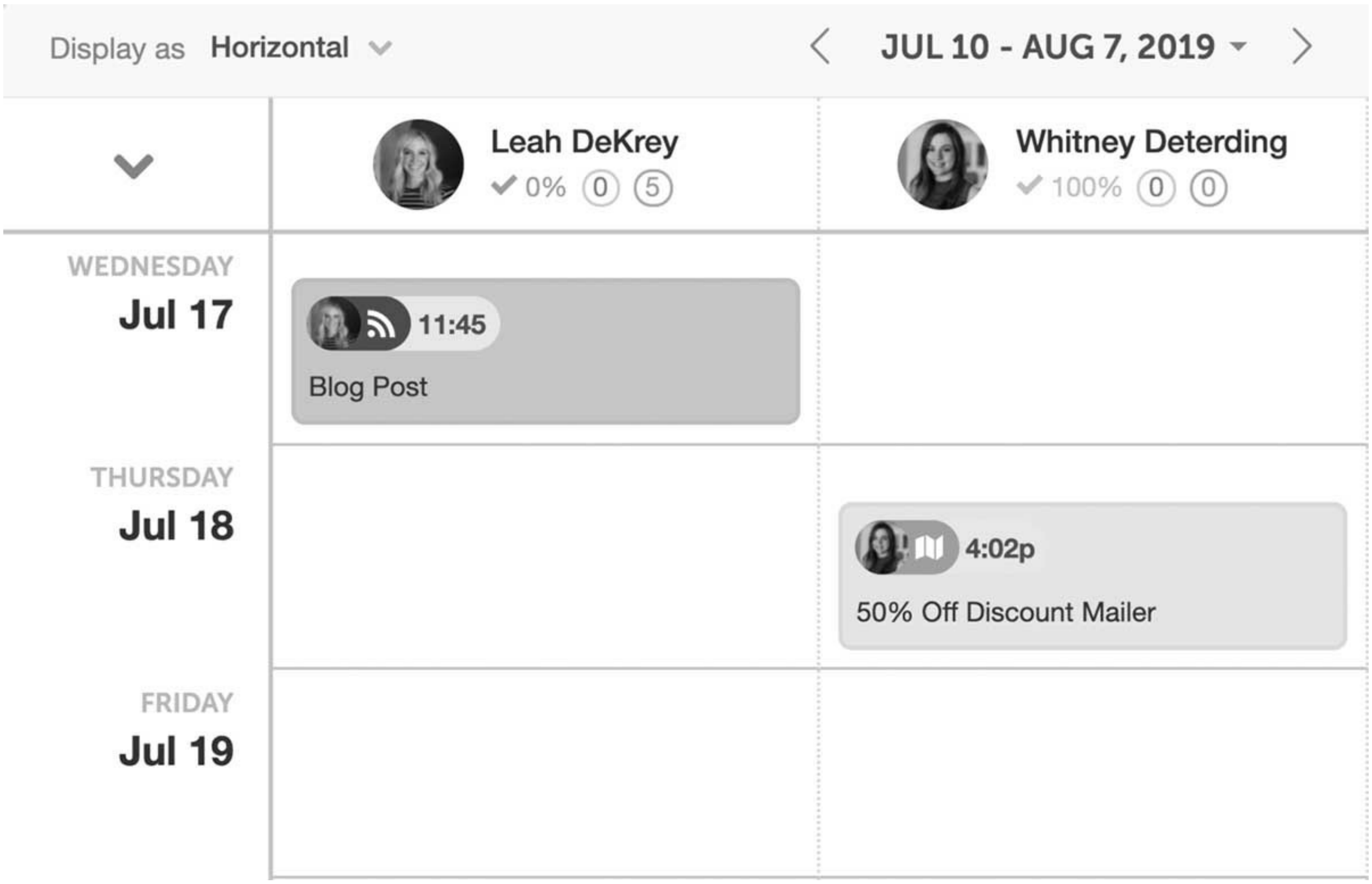



Within each task, you can add Task Approvals (available on Professional, and Enterprise Work Organizer and Marketing Suite plans—see details) to create approval workflows for each task as well (meaning a task can't be checked off and considered complete until it has been reviewed).

In addition to this, Task Rules (available on Professional and Enterprise Work Organizer and Marketing Suite plans—see details) can help streamline and automate workflows by automatically adjusting your project status once certain tasks are checked off.

## See Your Team’s Workload and Run Status Meetings

If you’d like to see all your team’s tasks during daily standup meetings, use the Team Management Dashboard (available on Professional and Enterprise Work Organizer and Marketing Suite plans —see details). This shows everything that everyone is working on (perfect for viewing the day’s work on your conference room TV).



## Collaborate and Manage Version Control

After your team leaves their daily standup, CoSchedule supports them getting their actual work done. Discussion Threads (available on all Startup, Growth, Professional, and Enterprise plans—see details) help organize correspondence around projects, so files and messages don't get lost in inboxes or internal chat apps.


Files can also be stored and shared using the Asset Organizer (available stand-alone with Growth, Professional, or Enterprise plans or as part of the Marketing Suite—see details), an effective digital asset management solution designed with marketers in mind. The team will always be able to find what they're looking for and share files between one another easily and efficiently:

## Execute and Publish Projects

When it's time to ship work into the world, CoSchedule customers can leverage integrations with WordPress (available with all Content Organizer and Marketing Suite plans—see details), all major social media networks, and internet service providers including MailChimp, ActiveCampaign, Campaign Monitor, and Constant Contact (available on Growth, Professional, and Enterprise Content Organizer and Marketing Suite plans—see details) to automate scheduling and publishing.

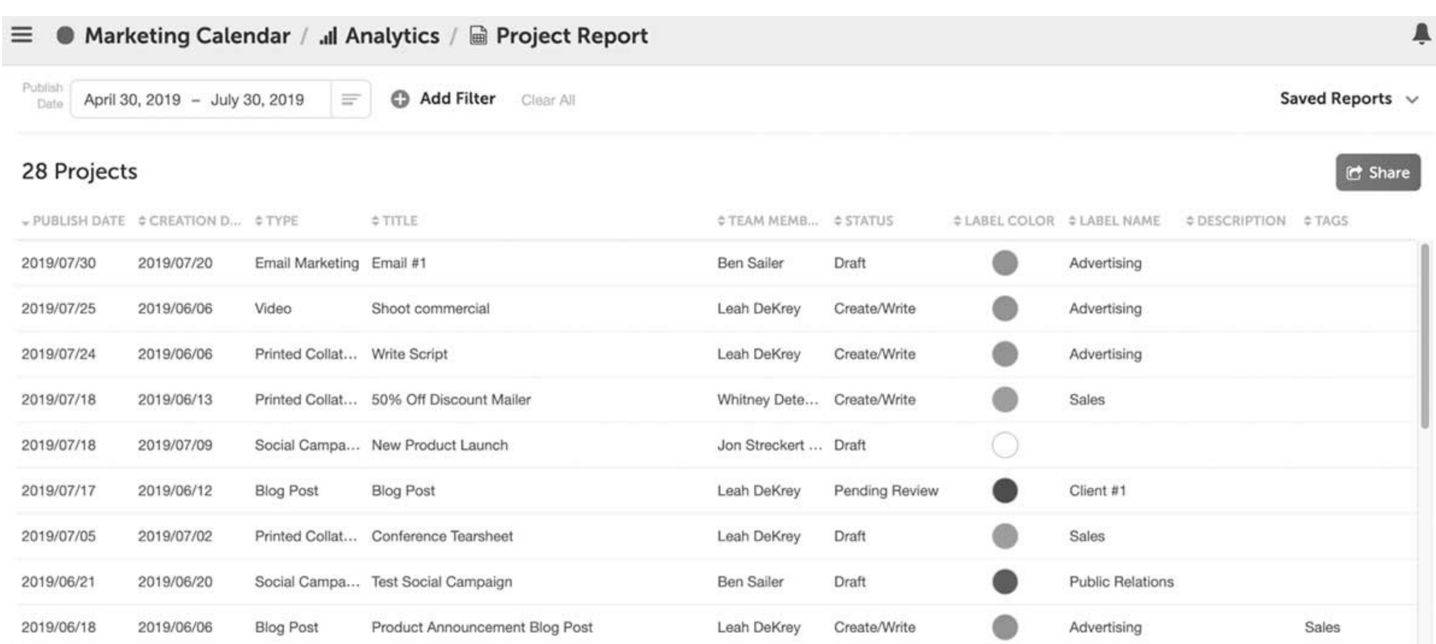
Checking off tasks and setting custom statuses also makes it clear to the team when projects have been completed.

# Measuring Team Output

How do you know that any of this is helping you ship more work? Team Performance Reports (available on Growth, Professional, and Enterprise Work Organizer and Marketing Suite plans—see details) automate on-time task completion so you can know who's getting their stuff done on time (and who's lagging behind).

This can help you understand who needs more things to do and who needs work taken off the plate. In turn, this can also be useful for better estimating your time in the future when planning sprints.


Plus, you can get detailed reports around specific projects and types of projects using the (suitably named) Project Report (available on Professional, and Enterprise Marketing Calendar and Marketing Suite plans—see details). This allows you to share your team's marketing activity with key stakeholders and generate custom reports you can share via exportable spreadsheet or PDF:




| PUBLISH DATE | CREATION D... | TYPE | TITLE | TEAM MEMB... | STATUS | LABEL COLOR | LABEL NAME | DESCRIPTION | TAGS |
|---|---|---|---|---|---|---|---|---|---|
| 2019/07/30 | 2019/07/20 | Email Marketing | Email #1 | Ben Sailer | Draft | | Advertising | | |
| 2019/07/25 | 2019/06/06 | Video | Shoot commercial | Leah DeKrey | Create/Write | | Advertising | | |
| 2019/07/24 | 2019/06/06 | Printed Collat... | Write Script | Leah DeKrey | Create/Write | | Advertising | | |
| 2019/07/18 | 2019/06/13 | Printed Collat... | 50% Off Discount Mailer | Whitney Dete... | Create/Write | | Sales | | |
| 2019/07/18 | 2019/07/09 | Social Campa... | New Product Launch | Jon Streckert ... | Draft | | | | |
| 2019/07/17 | 2019/06/12 | Blog Post | Blog Post | Leah DeKrey | Pending Review | | Client #1 | | |
| 2019/07/05 | 2019/07/02 | Printed Collat... | Conference Tearsheet | Leah DeKrey | Draft | | Sales | | |
| 2019/06/21 | 2019/06/20 | Social Campa... | Test Social Campaign | Ben Sailer | Draft | | Public Relations | | |
| 2019/06/18 | 2019/06/06 | Blog Post | Product Announcement Blog Post | Leah DeKrey | Create/Write | | Advertising | | Sales |

## Get Agile With CoSchedule

Hopefully, this guided tour will help you find your way around CoSchedule as you implement agile marketing within your department. Now, all that's left to do is get down to work. Start small, take it slow, and eventually you'll be completing more work, delivering projects on time, and proving marketing value in your organization.

From all of us at CoSchedule, here's to your marketing success!

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### WITH ADDITIONAL CONTRIBUTIONS FROM . . .

# Julie Neidlinger

Julie R. Neidlinger is a writer, artist, and pilot from North Dakota. She has been blogging since 2002 at her Lone Prairie blog, and works as a freelance writer and visual artist.

# Also By CoSchedule

*How to Create a Marketing Strategy That Will Skyrocket Your Results By 9,360%*

Tasked with creating a marketing strategy but don’t quite know where to start? It can be tough to know where to begin, and trust us, we’ve been there before too. That’s why we created this comprehensive and easy-to-follow guide to developing and documenting marketing strategies that work. It’s based on the same first-hand experience that has helped build CoSchedule into a leader in the marketing software-as-a-service industry.

Read and download the complete guide at: **coschedule.com/marketing-strategy/**

*The 10X Marketing Formula: Your Blueprint for Creating ‘Competition-Free Content’ That Stands Out and Gets Results*

This book’s title tips off the premise: WE’RE AFTER 10X MARKETING RESULTS. This means the return we expect, and are resolved to achieve, is ten times over what we put in. We aren’t looking for 10 percent year-over-year growth; we’re laser-focused on blowing the roof off last year’s, last month’s, and last week’s numbers.

TO DO THIS REQUIRES A MINDSET SHIFT. You can’t expect 10x results from copying everyone else. What worked for someone else isn’t a guarantee to work for you. This means drafting a binder full of charts and best guesses and calling it a marketing plan is doomed to fail. It’s too crowded and the world moves too fast for “copycat marketing.”

This book is about finding those strategic shortcuts. It’s about short-circuiting the path to jaw-dropping growth. YOU HAVE TO FIND YOUR OWN WAY — and the 10x-Marketing Formula is that path.

Buy the *10X Marketing Formula* at **coschedule.com/10xbook** or download chapter one (email signup required).