



How To:

MANAGE MARKETING PROJECTS AND PEOPLE

(without going insane)

FACING THE CHALLENGE

Marketing departments face the perfect storm of issues: too-small budgets leading to too-few people with huge financial return expectations.

To keep shifting priorities in check, marketers need to adopt an agile framework, like Scrum, to bring visibility -- and productivity -- to the forefront.

THE BASICS ON PM METHODOLOGY

AGILE VS. WATERFALL



AGILE

Agile is an iterative, flexible methodology that increases visibility into projects and adapts to evolving requirements. Agile works best with smaller, cross-functional teams.

Scrum is a framework, or set of practices, that is built around this methodology.



WATERFALL

Waterfall is a sequential process that is followed linearly during a project lifecycle. Waterfall attempts to plan the majority of a project before kickoff, which leads to a more controlled process. The tradeoff is its inability to adapt to updated requirements.

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WHY DOES AGILE WORK SO WELL FOR MARKETERS?

A successful marketer must be quick on their feet and quick to deliver.

Many unknowns can appear during the execution of a project, and responding to them swiftly is more valuable than attempting to predict them before they happen.

CREATING AN AGILE TEAM

ROLES & RESPONSIBILITIES

The roles of a traditional Scrum team are Product Owner, Development Team, and Scrum Master. Let's adapt these roles and apply them to our marketing team.



INITIATIVE OWNER

What do they do?

The Initiative Owner "owns" the creation and priority of all work items. They elicit requirements throughout a project and ensure each deliverable adds value towards the end goal of a project.



EXECUTIONAL TEAM

What do they do?

The Executional Team are the problem solvers of Scrum. The Initiative Owner explains the work items, but it is up to the Executional Team to create and implement the solutions, much like a development team.



SCRUM MASTER

What do they do?

The Scrum Master is the enforcer of all Scrum practices. Their main role is identifying and removing impediments that are preventing the Executional Team from accomplishing their work.

Events Coordinator

Digital Marketing Manager

Marketing Manager

Graphic Designer

Website Developer

Marketing Manager

Project Manager

Marketing Director

Marketing Manager

AND SOMETIMES, YOU'RE ALL THREE!

In a modern marketing department, team members are asked to wear many hats. It wouldn't be surprising to find an marketing manager running an email campaign, building and sending the emails and coordinating additional resources as needed.

The ABC's of Scrum

Although there are different roles in Scrum, they are extremely collaborative during the cycle of a project. Let's take a look at a standard Scrum cycle, from idea to delivery.

STRAIGHT UP SCRUMMIN'

Here's an example of the Scrum framework in action. The execution takes place during a 1-4 week timebox, called a Sprint, while other items are inputs or outputs in the cycle.



The eight items listed here are crucial to the success of a sprint.

Think of them as pieces to a puzzle: if you don't have all the pieces in place, you are not setting yourself up for a good sprint.

Let's dive deeper into the pieces of the agile puzzle.



Project Backlog

What is it?

The Initiative Owner compiles and prioritizes a list of tasks to be accomplished, usually based on internal and customer requests. These backlog items are often grouped by a main goal or feature, like a marketing campaign.

How often do you do this?

The backlog should always be updated with tasks and priority.



Sprint Planning

What is it?

The Scrum team meets to clarify requirements of the upcoming initiative the goal for the upcoming sprint. Starting with the most important task, the Executional Team commits to the tasks they believe they can complete during the sprint.

How often do you do this?

The Sprint Planning is held before every new sprint starts.



Sprint Backlog

What is it?

After the Scrum team commits to the tasks, the tasks are moved from the Project Backlog and into the sprint. This is called the Sprint Backlog, and is the sole focus of the Executional Team during the sprint.

How often do you do this?

The Sprint Backlog is the result of every Sprint Planning meeting.



Daily Scrum

What is it?

The Executional Team members are often working on separate tasks towards the same goal, so they meet to share progress. This brings visibility into the remaining work, and highlights any blockers in their way.

How often do you do this?

The Scrum team meets every day during the sprint.



Backlog Refinement

What is it?

The requirements of the Project Backlog tasks are often not fully defined. Backlog Refinement allows the Executional Team to provide more detailed and technical requirements around the task, and estimate the level of effort needed to complete the work.

How often do you do this?

Refinement is often ongoing conversations during the sprint.



Sprint Review

What is it?

During the Sprint Review, the Scrum team gives a demo of what they accomplished during the sprint. The Initiative Owner ensures that the tasks that were committed to in Sprint Planning meet the requirements and goal of the sprint.

How often do you do this?

A Sprint Review is held at the end of each sprint.



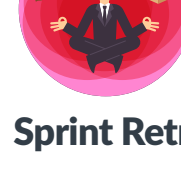
Project Increment

What is it?

This is the result of the team's hard work during the sprint. The tasks that were completed make up one or several deliverables that add value to the initiative. Some examples are landing pages, emails, or ad designs.

How often do you do this?

Ideally, each sprint ends with one or several deliverables!



Sprint Retrospective

What is it?

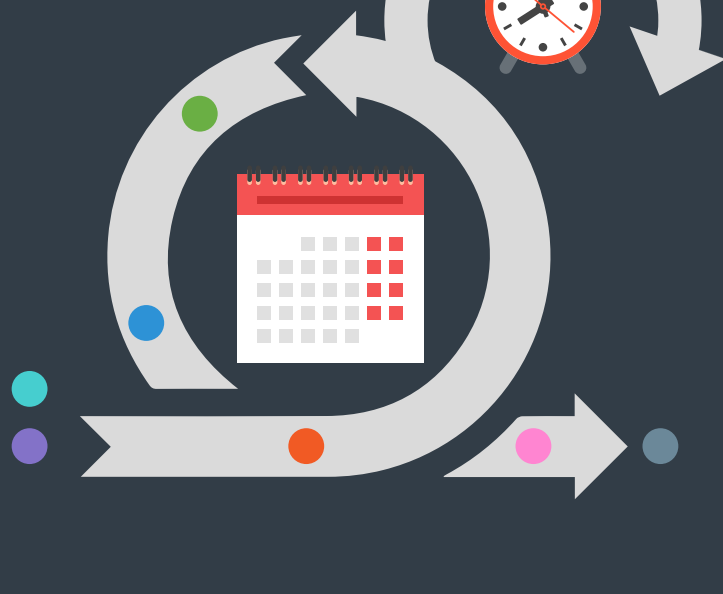
The Sprint Retrospective is exactly how it sounds -- a time to reflect on the sprint as a whole. As Scrum is an iterative process, the retrospective is a dedicated time to ensure the team is always improving.

How often do you do this?

The Sprint Retrospective is also held at the end of every sprint.

Take It Away

- Marketers live in an ever-changing industry and need a flexible, adaptable process
- Agile brings more visibility and accountability to your projects
- Scrum is the most used agile framework, and works well for small teams charged with delivering quality work



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