The SaaS Leader's

Guide to Building a Highly Effective Marketing Team With the Agile Framework

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Thriving in a digital world demands the ability — along with the willingness — to adapt.

As marketers, we're constantly faced with new technologies, are striving to meet higher customer demands, and are looking for ways to increase our efficiencies for better end results. Adaptation is the only way to navigate this ever-changing digital space.

We know because we've done it. During the pandemic of 2020, in a season of such uncertainty, we recognized more than ever the need to be nimble and responsive to customer needs. The Agile methodology helped our team transition to fully remote work, better estimate our workloads, and level up our productivity.

The key to realizing this success is embracing the Agile framework for marketing. In this 6-step guide, learn what Agile marketing is, why it's important for your business, and how you can get started on your Agile marketing journey.

Intellegence is the ability to adapt to change.

- *Stephen Hawking*

What Is the Agile Approach to Marketing?

Originating from the software development industry, the Agile framework helps marketing teams execute deliverables quickly by working in short sprints.

This methodology allows internal teams to concentrate on the highest priority deliverables, streamline communication with external stakeholders, collaborate with colleagues, measure value, and continuously improve performance over time.

At its core, Agile marketing has four phases:

- **Planning:** In the planning phase, marketing teams settle on the work they need to accomplish within a period of time.

- **Execution:** The execution phase is just what it sounds like — teams do the work they're assigned, and leaders remove any roadblocks.

- **Measurement:** Measurement is perhaps the most exciting phase, where team members review the tasks they've completed, how fast they completed them, and how well the final results aligned with stakeholders' expectations.

- **Reiterating:** Lastly, Agile marketing teams use feedback to iterate on their existing work and improve in the following execution cycle.

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6 Steps to Get Started With Agile Marketing

Clearly, there are benefits to going Agile. But what does that look like in practice? Below, we outline six steps to embracing the Agile marketing framework.

1. Understand the Lingo

Agile can feel like an alien world. Besides new ways of working, your team has to learn a whole new language. The first step to successfully going Agile is to define its terms in the context of your team's work. Here are the main terms you need to know:

Sprint

Sprints are a specified time limit for finishing a set of client deliverables. For marketers, an increment could be a white paper draft, an SEO strategy, or preparing and scheduling a certain number of social media posts.

Sprints are an excellent way to timebox your team, ensuring they only carry out the highest priority tasks. When one sprint ends, another one begins.

At LAIRE, we have two-week sprints, but other agencies have operated in one-week or even one-month sprints. You can try different time periods to see what works for your team.

Scrum

Scrum is an Agile project management framework for getting work done. Requirements change, goals change, and situations change. Scrum embraces those changes and is executed in a series of iterative sprints, allowing for more flexibility to supply value quickly without sacrificing quality.

Imagine a rugby team passing the ball from team member to team member to get the ball down the field to score a goal. Scrum is a collaborative team process referring to the format and organization methods we use (Agile methodology) to help us move tasks through to completion.

Stories

Stories are the foundation for the work that gets done within a sprint. They represent small pieces of work that add up to the shippable product increment delivered at the end of a sprint.

Some stories will be harder to finish than others. To account for this difference, Agile teams will allocate a certain number of "story points" to each story to show how much effort (on average) is required to complete the work.

Epics

Sometimes projects are so big that they need to be split into smaller chunks first before they can be the size of a story. Epics help us to categorize the heavier tasks and link them together in a checklist type of format.

One epic comprises two or more stories and may run longer than a single sprint. For instance, if your team is making changes to your company's homepage on your website, an epic would represent the updates that need to be made and might include tasks like updating navigation items, reviewing copy, redirecting links, creating new graphics, and so on.

Playbook

Many companies have a playbook that helps document the pieces and parts of your standard operating procedures and processes to create a consistent product.

For LAIRE, we use a playbook to document all of the possible epics and stories that match the deliverables we produce in our client retainers. We use the playbook as a living, breathing template to understand the time it takes to complete each task, using story points.

We keep the playbook in spreadsheet format and regularly assess for updates needed. Everyone on our team knows how much time it takes to complete a task for our clients, which helps us better plan and allocate employee time.

Backlog

The backlog is a list of all the epics and stories not currently assigned to a sprint. Before every sprint, the team grooms and prioritizes the backlog tasks to verify they have enough information and that the most critical stories take precedence.

Burndown Chart

Burndown charts show how an Agile team burns through the stories assigned to them throughout a sprint. The x-axis represents each day in the sprint, and the y-axis represents the remaining effort in the sprint in the form of story points.

Burndown charts help Scrum Masters confirm that their team is taking on the appropriate amount of story points per sprint based on their capacity.
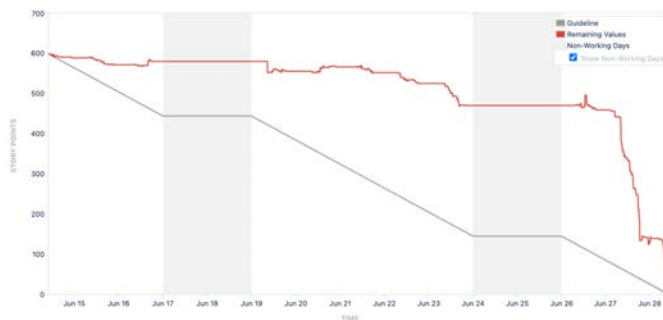
Retrospective

After a sprint is over, Agile teams will meet to discuss how it went in a retrospective session, close out the current sprint, and start a new one. The idea is to learn from what did and didn't go well.

Usually, each member of the Agile team gives their perspective, and the meeting closes with some action items for the team to mitigate any issues and continue performing optimally.

2. Define Everyone's Role

Defining who is responsible for what avoids inter-team conflict, overlooked requirements, and missed deadlines. At LAIRE, we break down the roles of our team members for each task into a few different categories:

- **Assignee:** This is the individual who will begin the task.

- **Client Advocate:** This person is the one who is managing the client account for whom the work is to be completed.

- **Implementer:** This team member is the one who executes the assigned work.

- **Reviewer:** This individual has the last pair of eyes that sees the work completed, prior to being sent for client approval.

- **Quick Fixer:** This person deploys any requested revisions after the Reviewer and/or the client has provided feedback.

Here's an example of how this could work for your team. Say you're creating a big PowerPoint presentation for leadership.

The Assignee would be the graphic designer who is handling the initial presentation template. The Client Advocate would be the person responsible for managing the task. The Implementer would be the graphic designer as they are preparing the template. The Reviewer could be a team lead to edit and ensure the design meets the presentation requirements.

No matter how you do it, ensure everyone on the team knows their part and how to play it.

> **Failure is not fatal, but failure to change might be.**
>
> *- Woody Zuill*

3. Pick a Project Management Tool

Project management is key to virtually any business function, so it's no surprise that there are hundreds of project management tools at your disposal.

When looking for a tool, make sure that it has the ability to break down large projects into epics and stories. Your team should also be able to log into the tool at any time and visually see their workload and progress (frequently represented in Kanban form).

Additionally, the software you choose should enable its users to build workflows that automatically assign the next steps in the task, such as moving the task to editors who will review the copy or coordinators to publish approved work.

Ensure your project management tool can re-assign tasks to different users, upload documents or images, and collect feedback in the form of comments. Out-of-the-box reporting is helpful as well, giving Scrum Masters insight into their teams' efficiency.

While these features are noteworthy, what matters is that your team feels comfortable using the tool. If it's not intuitive, people simply won't use it. Some great project management options are Jira, Asana, Airtable, Trello, and Notion.

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4. Implement Agile Meetings

There are four meetings in Agile methodology: Daily Scrum Standup, Sprint Planning, Backlog Grooming, and Sprint Retrospective. Unlike Agile roles, marketing teams don't need to make significant adjustments to standard Agile meetings to complement their work.

Daily Scrum Standup

Scrum Standups keep teams abreast of their peers' work and eliminate bottlenecks. Scrum Masters run this meeting every day and ask the group to briefly discuss what they have been working on and what they plan to work on that day.

Standups should take no more than 15 minutes and are typically held standing to keep the meeting short.

At LAIRE, this is something we do every morning to start the day, but since we're 100% remote, we use Zoom.

Sprint Planning

Sprint Planning meetings occur on the first day of every sprint. In these meetings, teams select the stories or epics they will work on in the coming sprint.

After a few sprints, Scrum Masters will have an idea of how many story points their team can handle. During Sprint Planning, Scrum Masters should keep tabs on how story points are stacking up against the team's baseline sprint capacity.

Backlog Grooming

Backlog Grooming sessions occur at the end of every sprint to prepare for the next sprint planning meeting. The Agile team reviews stories in the backlog and moves them up or down depending on priority.

In these meetings, the team also surfaces any vague requirements and refined stories that need more detail.

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Sprint Retrospective

Sprint Retrospectives critically evaluate the sprint and take each team member's feedback into account.

At the end of each sprint, team members review the work completed to understand why some tasks took more or less time, how clients responded to deliverables, and what techniques or tools were useful. Teams might also use these meetings to assess their velocity or the value delivered per sprint.

Retrospective meetings often bring up larger discussions for overall improvement or takeaways that can then be implemented during the next sprint for greater success. It's a learning process!

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5. Run Effective and Productive Daily Standups

Standups shouldn't be long, boring status update meetings. Instead, they should be capped at 15 minutes and focus on three things: what team members accomplished yesterday, what they hope to accomplish today, and any potential impediments to their plans.

It's often most convenient to host Daily Standups in the morning. That way, if roadblocks arise, relevant team members have time to huddle afterward to resolve problems. It's helpful to hear what team members are working on and creates a sense of inner accountability.

6. Actually Use Your Retrospective

> **If you adopt only one Agile practice let it be Retrospectives. Everything else will follow.**
>
> - *Woody Zuill*

With our busy schedules, it can be easy to treat Retrospectives like a throwaway meeting. But falling into that trap does yourself and your team a disservice.

These meetings should be safe, blameless spaces for team members to provide feedback. When people abide by these tenets, Retros can surface invaluable insights about how team members work, over-demanding departments or sectors of your business, or poor communication internally.

Make a running list of things to be addressed and group them into themes. Go theme by theme, asking your team for direct feedback. After your team has hashed out the root causes of issues, write out the action steps to fix each problem. Assign these items to appropriate people to ensure you see incremental improvements over time.

How Might Your Team Benefit From an Agile Approach?

Knowing what you now know about an Agile approach, take the time to imagine what implementing this methodology could mean for your company. Beyond revenue growth, here are some other things to look forward to after adopting Agile:

Flexibility: Whereas waterfall projects have to be executed in a particular order, Agile projects can be completed asynchronously. New tasks can be added to the work plan, or less-important tasks can be swapped out for more immediate tasks. As such, Agile marketing teams are incredibly well-equipped to respond to emerging trends or changes in direction without significant interruptions in production.

Working Smarter: Being scatterbrained is no longer an option in the modern workplace. To get things done on time, you need a strategy. Agile is perhaps one of the easiest ways to keep your team focused and on task. With time-boxed sprints, prioritized backlogs, and Retrospectives that identify areas for improvement, it's tough not to increase productivity and motivation among your team.

Clear Results: When a team logs their work and reviews it in Standups every day, it's easy to measure progress. With Agile marketing, teams will eventually determine their average working speed, capacity, and output. Agile reporting makes it easy to give clients accurate deadlines and see new work coming down the pike. Plus, your team will thank you for making their lives less stressful.

Accountability: Agile revolves around accountability. Teammates are constantly sharing information, showcasing their work, and raising concerns about obstacles in their way. Agile marketing teams use project management tools that display everything team members are working on, so there isn't an opportunity to hide or stay siloed. With Agile, transparent communications are inevitable.

Make Agile Your Ally

Putting on our Agile hat forced us to prioritize our work like we never had before.

The Agile methodology has enhanced our internal communication, allowed us to forecast our workloads accurately, and put our client work into perspective by documenting how much time we spend on their deliverables and juggling low- and high-priority client requests. With the six steps above, you'll be well on your way to achieving this too.

Ready to expand and implement a new strategy to boost your conversion rates? AND support your SaaS sales teams to exceed their goals?

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