

The background features a series of curved, dashed lines that create a sense of depth and movement, resembling a perspective view of a road or a tunnel. The lines are composed of small, dark rectangular segments. The overall color palette is monochromatic, using shades of gray and black on a white background.

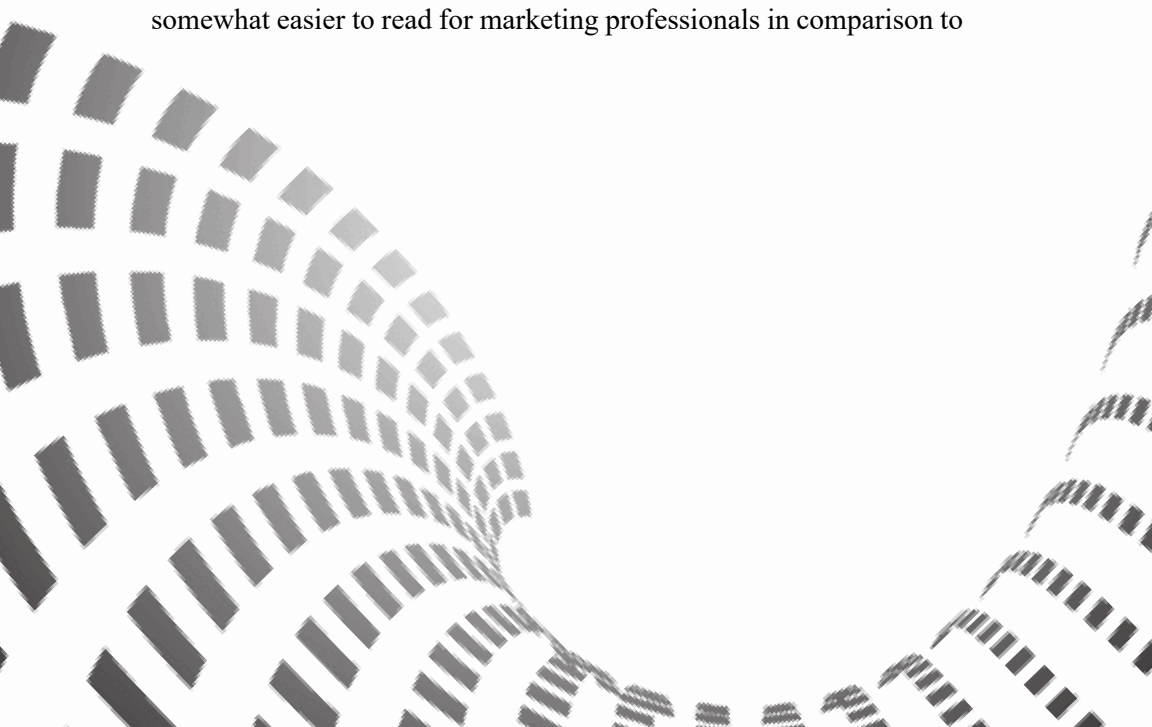
AGILE MARKETING WITH KANBAN BOARDS

Created by Femi Olajiga - Agile Marketing Coach and Team Effectiveness Trainer

WHAT IS KANBAN? A BRIEF HISTORY

Agile way of working is not restricted to software development teams, because most of its practices originated from outside software. For people that don't already know, Kanban is a term used to describe visual cards on a signboard ordered in such a way as to explain steps of a workflow or task sequence. The history of Kanban dates back to the 1940s through the work of Taiichi Ohno who introduced the concept in the manufacturing industry. Ohno was inspired by an experience he had in a supermarket while observing how stores restocked items in their inventory. He realised store clerks only replenished their storage inventory when item on the shelves were close to being sold out. His interpretation of the process he witness led to the introduction of the 'just-in-time' (JIT) process within Toyota's manufacturing plants.

Kanban was later introduced to the IT Software development industry by David J. Anderson. The publication of his book *Kanban: Successful Evolutionary Change for Your Technology Business* in 7 Apr 2010 helped accelerate the adoption of Kanban in software teams. Jim Benson is another thought leader within the Kanban space and his book: *Personal Kanban: Mapping Work / Navigating* is somewhat easier to read for marketing professionals in comparison to



David Anderson's book. The adoption of Kanban as an Agile way of working has been rather low within marketing and non-IT teams. In my experience, the application of Kanban within marketing differs to its application in IT: the same way David Anderson adapted Kanban for software teams, marketers must tailor Kanban to the context of their team.

KEY PRINCIPLES OF KANBAN

Kanban in the context of marketing is all about mapping the end-to-end flow of work, from start to finish, in order to visualize work, increase speed, manage flow and reduce or eliminate frictions points. Listed below are the key principles of Kanban interpreted in the context of marketing:

- Visualize your work: use colour
- Limit your work in progress: use pull not push for capacity management
- Manage flow: clearly define the key stages of your workflow
- Communicate guidelines on how task is completed
- Early feedback

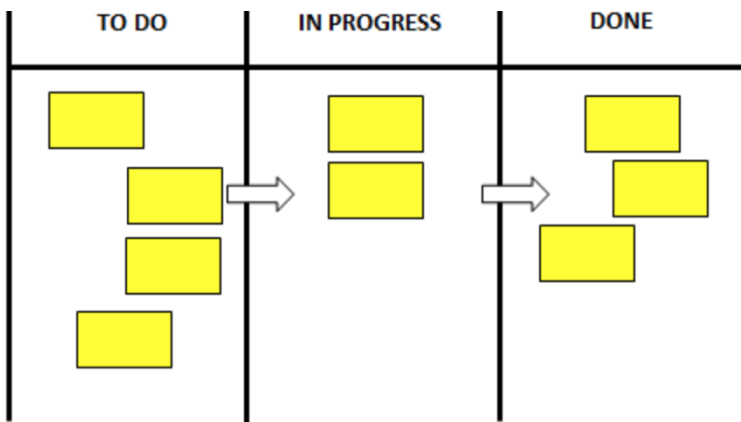
Visualizing your work

Kanban creates an environment that allows information to radiate across individuals on the team, as well as external stakeholders. By visualising team tasks and task flow, you reduce the need for

unnecessary meetings because the information on the Kanban board is a source of information updates for senior management to see how work is progressing within your team. It also highlights issues that are slowing the team down and where the team capacity is being stretched.

The visibility of tasks, their dependencies, delays and the capacity of the team to handle the workload helps to increase collaboration, which improves the effectiveness of the communication, both within the team and externally. This is the best case scenario with Kanban but it's important to highlight that your team and company culture will determine the effectiveness of Kanban in your context. Using Kanban in the wrong culture can lead to extreme micromanagement and stress for some members of your marketing team. Hiring an Agile marketing coach can help ease your Agile marketing Kanban adoption.

The effect of visualizing the flow of work reveals bottlenecks that restrict smooth flow of task within and across teams. Some bottlenecks in workflow can occur due to miscommunication, competition or personality clashes between individuals on the team. Let's illustrate this in the context of a website redesign project: if the Graphic/Web Designer is available for 2 days per week, whereas people responsible SEO, Analytics, Content, UX and Conversion optimization have the capacity for 5 days per week, the flow of work through the kanban





board will be affected because the capacity of the designer is a bottleneck. What if you outsourced your SEO, PPC, Social Media, Video and other functions to different external agencies? This would create additional bottlenecks. How would you create a Kanban board with the right flow? And what if you work in a heavily regulated industry with strict compliance procedures towards information sharing and visibility?

In the case of our website redesign example, the bottleneck will increase lead time, i.e the time it takes to start the work and complete the redesign process. And, for marketing teams with multiple external agencies that don't communicate with each other, workflows and efficiency drops continuously and considerably.

Limiting work in progress

It is important to limit the number of tasks being worked on by the team at every single point in time. Reducing the possibility of multitasking is the rationale behind setting a Work-in-Progress (WiP) limit for each member of the team. Rather than forcing tasks on people, Kanban recommends creating a pull system that allows people to take on additional tasks when they have extra bandwidth to execute them. The default way most marketing teams work is top-down, pushing tasks to the team with strict deadlines. With Kanban, marketing teams can improve the flow of work through the team, while still effectively managing internal and external dependencies.



Managing Flow

By setting work-in-progress limits you can optimise the task execution speed and flow of work in your marketing team. Depending on how you define the stages of workflow and the dependencies between marketing channels and tactics, Kanban will help team leads manage task allocation and execution more effectively.

Continuous Collaboration and Improvement

The visibility of task allocation and flow of work creates a culture of face-to-face interactions for collocated teams using physical boards. Depending on the culture of your organisation of the team, Kanban has the potential of triggering brainstorming which leads to innovative ideas.

BENEFITS OF KANBAN TO MARKETING

Kanban is a good way to switch from command-and-control leadership approach to a more collaborative approach that empowers individuals on the marketing team. It hinges on the fundamentals of effective teamwork through open and honest conversations. This depends largely on buy-in from senior stakeholders, coupled with the help of an Agile coach with a background in and a deep understanding of marketing.

Kanban is easier to adopt in marketing than the Scrum framework because it eliminates the stress associated with changing job roles. It also eliminates extra meetings because all team members conduct


daily meetings in front of the Kanban board. This improves task visibility while increasing team interaction and communication. Task visibility helps highlight potential bottlenecks in task execution with the team or external dependencies causing delays. Kanban can help you reduce costs by eliminating re-work and task duplication within your marketing function. It also reduces risks in your workflow because the daily conversations and interactions between individuals lead to identification of potential risks that might occur down the line, so these can be avoided or mitigated early.

If implemented properly, Kanban can also reduce multitasking and the cost of delays caused by workflow disruptions in the marketing team. With Scrum, there is always the headache of Sprints, but Kanban allows marketing teams to adopt a just-in-time process which ultimately increases productivity. Depending on your marketing structure and sector, individual workload and capacity will be different and the only way to highlight any issue to senior management is through Kanban. It suddenly becomes very clear which marketing function is overworked and understaffed.

CREATING YOUR MARKETING KANBAN BOARD

Starting with Kanban for marketing requires the following:


- Big whiteboard or whiteboard wall
- Post-it notes
- Sticky cards
- Whiteboard sharpies

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- Black tapes
 - Stop watch

If you want to use an online Kanban board, I recommend researching online to find the tool with the best functionality suited to your team requirements. You can start your search with the following popular tools:

- LeanKit
- RealtimeBoard
- JIRA
- Digite (Swiftkanban)
- Trello

These tools will help you define individual and team task flow on a tactical level, while ensuring alignment with your overall marketing strategy. It is important to start with individual kanban boards in order to understand dependencies for each person before creating the overall team and group Kanban. This process will be different for large marketing teams with multiple lines of business and product lines and can easily become messy if



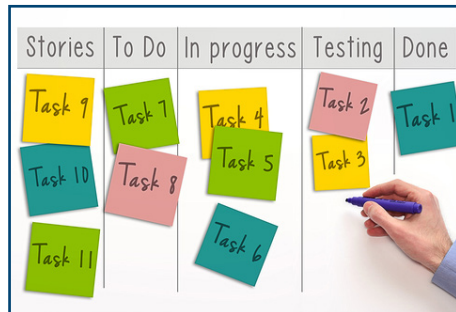
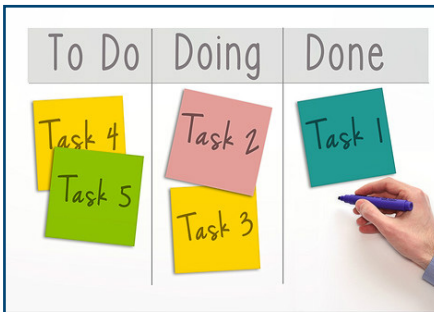
not planned properly. You need to consider the context of your task flow as a department and how it trickles down to team and individual level in the context of your team. I recommend reading Kanban books and literature, training a member of your team in Kanban or hiring an Agile coach with a marketing background.

The next step is to organise an initiation meeting with everyone on your team with the core focus of mapping out the task flow. Many bottlenecks to task flow will be highlighted in these types of meetings and depending on your culture, this can lead to improved communication and collaboration between individuals and across the team. During the meeting, each member of the marketing team will create top level themes that can be broken down into small tasks. For example, ‘create content’ is a theme that can be broken down into creating blog post(s), white paper(s), video content and other ways you could re-use the initial content created.

You don't necessarily need to be granular with creating individual and team level themes and tasks because it is better to review planned tasks during your team meetings. Assuming you have already created your physical Kanban board or subscribed to an online Kanban software

tool, you then do the following:

- Decide how many boards to create. You need to define workflow on individual, team and group level to show the flow, interrelatedness and dependencies. This part is not prescriptive because the flow of work for content marketing will be entirely different to SEO and CRO. Every marketing function has its own workflow which comprises of recurring and one-off tasks, which need to be taken into account.
- For each board, decide the number of columns and titles that align with your workflow. The popular columns are To-Do, Doing (or In-progress) and Done columns. You can be creative with your Kanban design as long as you agree on work-in-progress limits and a clear definition of 'Done'. Done is a word that describes the acceptance criteria that qualifies a task as completed. Each individual on the team creates a list of tasks they plan to work on, which include a short description of the task at the back of the task card. It is important to make sure your kanban board is located where it is visible to everyone on the team as well as to other important stakeholders.
- Prioritize tasks in order of value, urgency and dependencies. It is important to align each task to your top level marketing strategy





for easy alignment with others on your team. There is always the danger of office politics hijacking prioritization if you don't have a defined and documented marketing strategy.

- Unlike the Scrum framework that forces teams to create Product-Owner and Scrum-Master roles, Kanban does not require any change in roles and job titles because you start with your current team structures.
- Meetings: This will depend on whether your marketing team is collocated or distributed. Schedule your daily meeting in front of your physical board or have your online board on a big (shared) screen and discuss the tasks for the day. The conversation should include task prioritization and task list for the day. I recommend assigning a member of the team to facilitate your meeting and rotate this task across all members daily. Also remember to assign someone to sync your physical and virtual board if you decide to use both types of Kanban boards at the same time.

boards for globally distributed teams. Also bear in mind that how you define teams, groups (whether collocated or distributed) is important.

Set up your Kanban Board near to your team workspace if possible, because proximity of your board is extremely important to ensure visibility. Some teams combine online and physical Kanban boards for added flexibility.

Do you have your marketing function in-house or completely outsourced to external agencies or consultants, or a mix of both? How you choose your Kanban will depend on your answer to this question.

Depending on the Kanban software tool you choose, it is important to consider the dependencies of tasks within the team and how much dependencies on external stakeholders will impact your workflow. The structure of Kanban boards will vary for each individual on the team as well as team level boards. There is no 'one size fits all' approach to Kanban.

For example, I have a physical .






CONCLUSION

Creating a Kanban board is extremely easy, but at the same time it can create new problems for your workflow if not implemented properly. In the simplest form, you can decide to use a physical Kanban board or an online Kanban software tool. Based on my experience, I recommend physical boards for collocated teams and online boards for globally distributed teams. Also bear in mind that how you define teams, groups (whether collocated or distributed) is important.

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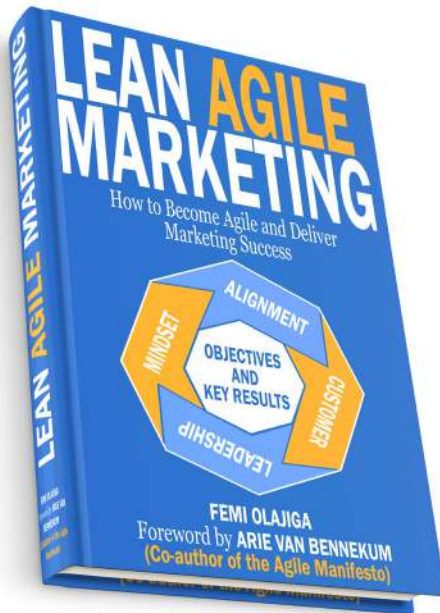


For example, I have a physical Kanban board in my office with three columns:

- To Do
- Doing
- Done

Then to the side of my board, I have a list of 10 high level projectops, one of which was my own website redesign project. Instead of breaking the project down into multiple tasks, I decided to go with ‘Website Redesign’ as the task description (some people also like to call it ‘user stories’). Under my Kanban board, I have the breakdown of what I plan to work on daily, which is normally 3-5 tasks that I have the capacity to complete. I don't use post-it notes because I found them messy, but instead I write with whiteboard sharpies to make things easier and tidy. Then on another side of the board I have my top level strategy, vision, KPIs and targets. The point I am trying to make is that you don't have to follow the rigid approach to your Kanban design, as long as you follow the important principles of Kanban. Some teams get urgent and priority items pushed to their board and you, therefore, also need to plan your capacity to cater for the unexpected. Text-book Kanban and the stuff we hear in conferences is different to what happens in the real world of work, so feel free to experiment and adapt Kanban to the context of your team as much as you need to.

After implementing Kanban within your marketing team, you might then argue your preference for physical or online Kanban, but my recommendation is that you start with the context of your team to decide what works for you. Feel free to contact me if you need support with your Agile marketing implementation, I offer tailored on-site and virtual training workshops and coaching sessions.



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