

HOW TO IMPLEMENT SCRUM IN THE CONTEXT OF MARKETING

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LEAN AGILE MARKETING

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How to Become Agile and Deliver Marketing Success



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PART 1 SCRUM IN THE CONTEXT OF THE WORK BY PROFESSOR HIROTAKA TAKEUCHI AND PROFESSOR IKUJIRO NONAKA

In 1986, Professor Hirotaka Takeuchi of Harvard Business School and Professor Ikujiro Nonaka of Hitotsubashi University published the article titled “The New New Product Development Game”. The article explained leadership and team practices in manufacturing companies like Honda, 3M and Toyota. The core of their discussion revolved around the importance of speed and flexibility for the survival of the business, whilst identifying the following processes as key determinants of high-performing teams:

Built-In-Instability: Team plans are based on the vision and strategic objectives defined by senior management. Leaders empower team members by offering some level of freedom and autonomy, which positively impacts team creativity. The article gave an example where senior management requested the team to deliver a project within a specified timeline, with a defined expectation and a target of reducing cost by 50%, whilst also giving the team the freedom required to execute the tasks required. The key point was that, with a good balance of pressure and freedom, team creativity will increase.

Self-Organizing Teams:

According to the article, a team must fulfill three important conditions before it can achieve high performance:

Autonomy: Senior leaders reduce their micro-management of team members by giving teams more freedom to decide how they want to do things. This does not necessarily mean the team will have

no leader, far from it! It does mean that leaders use subtle control, by allowing team members to set their own direction, as long as that direction is the same as the overall strategic direction of the business as a whole.

Self-transcendence: Thinking outside the box is a term that has different meaning in different contexts. Although not specifically mentioned in the article, one important quality of high-performing teams is the presence of “diversity of thought”. A team of people that think the same way will have an extremely limited probability of innovation.

Cross-fertilization:

According to the article, high performance in teams depends on the level of diversity in terms of skills, behaviour patterns, specialisation and thought process. The automotive company, Honda, fostered this diversity by creating teams composed of handpicked individuals with different personality traits and education backgrounds, coming from different departments, which “fostered new ideas and concepts”. Another key ingredient for the high performance of these handpicked teams was the high level of interaction between its members on a daily basis.



Overlapping Phases:

Traditional project management is structured in phases that involve a rigid, sequential process which requires one phase to stop before another one starts. Teamwork is like dancing, with the right rhythm, it produces positive results. However, synchronizing task and workflow within and across marketing teams is a major challenge.

The marketing process is a flow process that can be likened to dancing. It is not a sprint, but an overlapping flow of planning and execution tasks. According to the article, high performance depends on how the individual rhythm is combined with the team and group rhythm. Their approach recommends overlaps between project phases as opposed to having a rigid 'phase gate' approach to projects. Emphasizing increased interaction between everyone on the team can help reduce the impact of the lack of communication.

Multi-Learning:

The close interaction between team members directly impacts a team's overall learning and development. A good example was learning at the company 3M, where team members were allocated 15% of company time per week for personal development. In recent times, companies like Google permit their employees to spend 10% company time on personal development. These companies know that this small sacrifice of their employees directed time will enable them to feed their passions and, in return, foster their creativity.

Subtle Control: It is suggested that leaders and managers "should" empower their teams, although not necessarily mean relinquishing all of their authority and control over them. According to the article, leaders and managers can establish subtle control over their team in the following ways:

By employing (selecting) the right people for their team. The level of self-organisation your teams can achieve is dependent on the blend of the personalities you have hired.

By creating an open work environment for the team. How you define this statement will depend on the personalities of the people on your team.

Every team has a customer that holds it to account, either external or internal. Encourage your team to listen to customers in order to meet their expectations. If your team is satisfying customer expectations, why would you ever want to micromanage your team?

By using a team-based reward system as opposed to individual-focused reward system.

By creating an environment that allows people to make mistakes without fear of being fired.

Organisational Transfer of Learning: One of the key benefits of creating high performing teams is

the fact you can then transfer members of these teams to other teams in order to expand collective learning. Agile transformation in software teams normally starts with a pilot team before it expands into other teams. In the same vein, knowledge from software Scrum teams is currently being transmitted and adapted to marketing teams by a fair few trailblazers.

Although there are a lot of benefits to their approach, it is important to highlight that both Professor Hirotaka Takeuchi and Professor Ikujiro Nonaka stated the limitations of their Rugby approach. For this reason, I recommend reading the article with an open mind and, if you do decide to apply some of the recommended principles, make sure you carefully consider the context of your team. This is exactly what Ken Schwaber and Jeff Sutherland did when they adapted the content of the article to create Scrum for software development teams. Next I will explain how marketing teams can adapt the Scrum process specifically to marketing.



APPLYING SCRUM

PART 2

IN THE CONTEXT OF MARKETING

The Scrum process is not difficult to understand or master, if applied in the right context. Scrum was originally developed by software professionals for software development projects. The cornerstone of Scrum is based on 3 process control principles originating from the work of engineers Babatunde Ogunnaike and W. Harmon Ray.

The 3 pillars of the Scrum process are:



TRANSPARENCY



INSPECTIONS



ADAPTATION

Transparency:

The Scrum Guide states that “Significant aspects of the process must be visible to those responsible for the outcome”. How does transparency apply to the marketing team? Before answering this question, first think about the structure, size and task flow within your team. Also think about what percentage of your team is collocated and how many external agencies and contractors you have on your books. Answering all these questions is the first step. The next step (arguably the most important one) is to carefully consider your overall marketing strategy.

According to research by SmartInsights.com, 50% of businesses don't have an integrated digital marketing strategy. This begs the question: what are you going to make transparent if you don't have a marketing strategy? For companies that have a marketing strategy, the first step to applying Agile marketing is to make their strategy visible to everyone within their marketing function, as well as to important external stakeholders. How you define 'important external stakeholders' will depend of your existing customer experience score.

Inspection:

According to the Scrum guide, regular inspection is important in order to ensure the achievement of the sprint goals. How does this apply to marketing? In my experience, it can be difficult for marketing teams to work in sprints. Even the concept of Kanban, where work flows through the board, can be difficult, because these processes and frameworks have been developed for non-marketing teams.

How can marketing teams inspect their work? Your organisational chart and team reporting structure will determine your inspection process. In my experience, the best way to inspect and adapt will depend on the quality of your 1-2-1 and team meetings. The success of Scrum in IT is largely based on the presence of a skilled facilitator responsible for overseeing meetings, as well as disciplined practices like timeboxing. This helps to keep everyone focused on the team goals. Inspection for B2B marketing teams will be totally different to that for ecommerce teams. An effective inspection of your team will make sure everyone is working towards expected goals and will take into account your existing team dynamics. This is where the presence of an impartial Agile marketing coach can make a real difference.

Adaptation:

In the context of marketing, adaptation ensures that plans don't deviate from the initially agreed goals. Meetings and other interaction activities are the best way marketing teams can inspect their work and adapt to limited deviations from their original plan.

Scrum Values

The values highlighted in the Scrum Guide include:

- COMMITMENT
- COURAGE
- FOCUS
- OPENNESS
- RESPECT

These values are not unique to Scrum, because they resonate with everyone irrespective of industry. As marketing teams, our values are determined by the behaviours that radiate down from the senior leadership team. The values written in the company vision and mission statements are different from the actual values that are normally reflected in the day-to-day work within an organisation. The actual values of your team will directly impact the team's performance and your overall customer experience. I once read an article about a company that claims respect and empowerment for employees in public, yet fires its employees for trivial and negligible mistakes - obviously this is not a great way to build a reputation. As a senior manager, you have to open your eyes and really see what are the values that continuously transpire within your teams.

The Scrum Team

According to the Scrum guide “The Scrum Team consists of a Product Owner, the Development Team, and a Scrum Master”. The team is referred to as being cross-functional and self-organising because it includes members whose skill sets encompass all the skills required to complete the required team tasks. What this means is that the team is structured in a way that can limit any form of external dependencies or influence. This is just impossible in the context of marketing teams because marketing team members must work with external stakeholders and agencies all the time in order to achieve their objectives. Another important point marketing teams must consider when applying Scrum is the fact that the software development teams complete chunks of work at regular intervals called “Sprints”. In marketing, it is rarely (if ever) possible to organise work in a very structured way, because of the inter-dependencies identified above. Now let's discuss the roles within the Scrum Team.

The Product Owner Role: This role is responsible for maximising the business value of the team. Scrum teams in the software industry have a list of deliverables called backlog items and the product owner is their strategic custodian. The structure of the marketing team is multi-layered and largely depends on the size, business unit and structure of the organisational chart. People are naturally resistant to change and asking marketing teams to change job title to “Product Owner” is counter productive in my humble opinion. However, that does not mean that marketing teams cannot have a role that covers the responsibilities of a Product Owner - it just might need to be branded differently.

The Scrum Master Role: According to the Scrum Guide “The Scrum Master is responsible for promoting and supporting Scrum as defined in the Scrum Guide”. Sounds important, doesn’t it? My view is that the fact that marketing teams already have managers makes this role irrelevant in the context of marketing teams. Why would marketing teams have to create a Scrum Master role? Although there are numerous Agile marketing articles online that suggest marketing teams should adopt Scrum roles as described in the Scrum Guide, my recommendation to marketing managers is to experiment with Scrum in the context of their teams without being dogmatic in their adoption.

The Development Team: Scrum Guide advocates the optimal size of the development team as being between 3 to 9 people. The recommendation of 3-9 individuals is also the recommended size for high performance teams and this has been established long before Scrum was designed. How would a global marketing department of 250 people distributed across different business units and geographical regions adopt Scrum? I must also highlight here that 250 people would be considered a group and not a team. An Agile coach with a non-marketing background would recommend large scale Agile frameworks like SAFe, Large Scale Scrum, Nexus and others. However, as marketers, we need to understand that such frameworks are primarily designed for IT software teams and any application of these (or portions of these) will require serious consideration and adjustment in the marketing context. So the question remains: how do marketing departments of 250 people (or more) adopt Agile marketing? The answer is simple, hire a qualified team coach with relevant formal ICF-accredited coaching training. They will be able to understand the unique context of your department and will work with you to adapt the relevant elements of Agile frameworks that will add value to you, your team and - most importantly - your customers.

Scrum Events

According to the Scrum Guide “Events are used in Scrum to create regularity and to minimize the need for meetings”. One of the things marketing teams can learn and adapt 100% from Scrum is its ‘time-boxing’ recommendation for meetings and all interaction activities, with the exception of Sprints. The time-boxing strategy planning and daily meetings will reduce time wasting and completely eliminate ‘boring’ meetings. I will explain the danger of sprints next.

The Sprint:

According to the Scrum Guide “The heart of Scrum is a Sprint, a time-box of one month or less during which a “Done”, usable and potentially releasable product (software) is created”. I quoted the Scrum Guide here to highlight the important term product. The product was traditionally considered a piece of software, until the most recent update of the Scrum Guide, when the definition was somewhat expanded. Marketing teams do not deliver “working software” or “shippable” products, and we definitely would not be able to work in sprints because the marketing calendar is already structured into 4 quarters for each year.

The success of Scrum has been very impressive in software development and its growth has given birth to multiple certification organisations that are primarily focused on software teams. Due to the expansion of Scrum outside of IT, these same organisations are tempted to diversify into other industries by selling the same Scrum framework to non-IT teams, all the while ignoring the difference in contexts. I myself paid a significant amount of money to complete the Scrum Master course and I struggle to see where this particular course can add value to marketing professionals, because the entire course content and structure caters exclusively to IT teams. This is fine for IT professionals, but not for marketing professionals. Having now gained considerable experience in applying Agile to marketing, it is my view that (as a marketer) your time (and money) is better spent on reading and understanding the latest version of the Scrum Guide and the 1986 Harvard business review article I mention in the beginning of this blog.

Sprint Planning:

According to the Scrum Guide “The work to be performed in the sprint is planned at the Sprint Planning. The plan is created by the collaborative work of the entire Scrum Team”. For teams that have a defined marketing strategy, planning meeting is an expected process by default. But one thing we can learn from Scrum teams is the emphasis on the entire team creating planning collaboratively. How your marketing team does this will depend heavily of your team dynamics, culture as well as the number of stakeholders involved. Without going into too much detail about Sprint planning, I recommend hiring an Agile coach with formal marketing training and experience to facilitate your planning meeting.

Sprint Goals: According to the Scrum Guide “The Sprint Goal is an objective set for the Sprint that can be met through the implementation of product backlog”. Teams I have worked with in the past used OKRs (objectives and key results) as guidance to ensure everyone on the team is aligned. This, again, will depend on whether or not your marketing team has a clearly defined marketing strategy.

Daily Scrum:

This is one of the most popular meetings in Scrum teams and it can be applied directly to marketing teams. Everyone on the team meets for 15 minutes at the beginning of every working day and the meeting agenda is always based on only three things:

- WHAT DID I DO YESTERDAY?
- WHAT WILL I DO TODAY?
- WHAT IS BLOCKING OR PREVENTING ME FROM DOING MY WORK?

Each person on the team then spends 2-3 minutes explaining their activities without any interruption from other members of the team. While this is one of the basic Scrum meetings, there is always the danger that such a meeting could morph into a micro-management tool for team managers with command and control tendencies. I recommend hiring a qualified Agile marketing coach for your team leader/manager to provide support with facilitating your daily meetings in a more advanced and systemic way.

Sprint Review:

In the context of marketing teams, a sprint review is no different to weekly 1-2-1 meetings between a manager and an individual on the team. The difference here is that the review happens in the context of the team. While I do not recommend marketing teams to structure their work in sprints, review meetings are a good way to inspect and adapt team tasks to individual roles, making sure they stay aligned with the agreed marketing objectives.

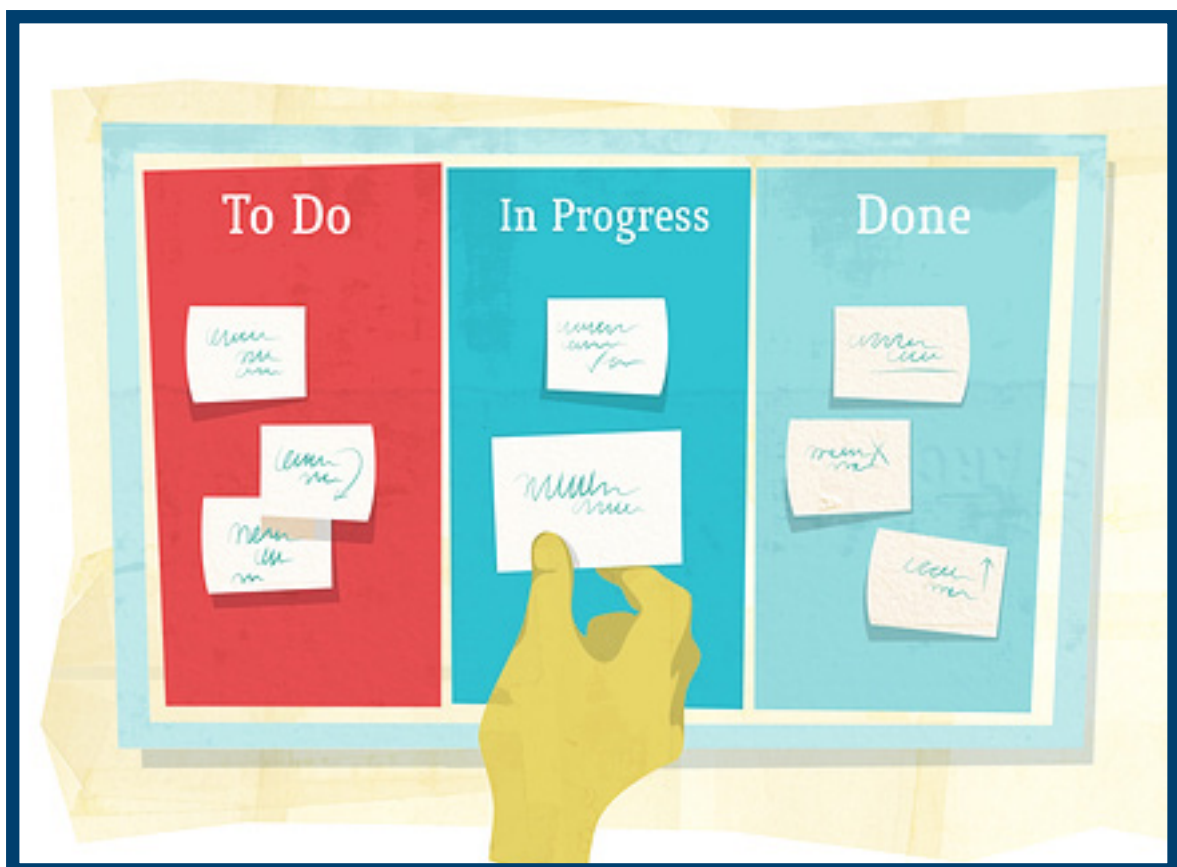
Sprint Retrospectives:

The retrospective in the context of marketing is the process by which teams evaluate their communication, task execution and interpersonal interactions at regular intervals. The primary aim of this is to resolve conflicts and identify ways the team can improve their collaboration.

CONCLUSION **PART 3**

The success of Agile in software teams is based on multiple factors. However, it is important that we understand the difference in context when trying to apply Scrum to marketing. Majority of Agile coaches currently out there are subject matter experts (Agile) with practical experience as software developers before transitioning to become Agile Coaches. Although their experience with Agile might be extensive, in a marketing team you need someone who also appreciates the complexities of the marketing function and it's role within the business. What I would recommend is that marketers read and understand The New New Product Development Game before reading The Scrum Guide. This will equip you with a broader contextual view of Scrum and how it can be applied to marketing. For a more tailored adoption of Agile within your team, however, make sure you get expert support from a qualified coach with a background in Agile and marketing.

Contact me via email at femi@cxconversion.com if you need support with Agile marketing training or coaching.



REFERENCES



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