

Ways of Working

Agile Marketing
Agile Tools and Ceremonies



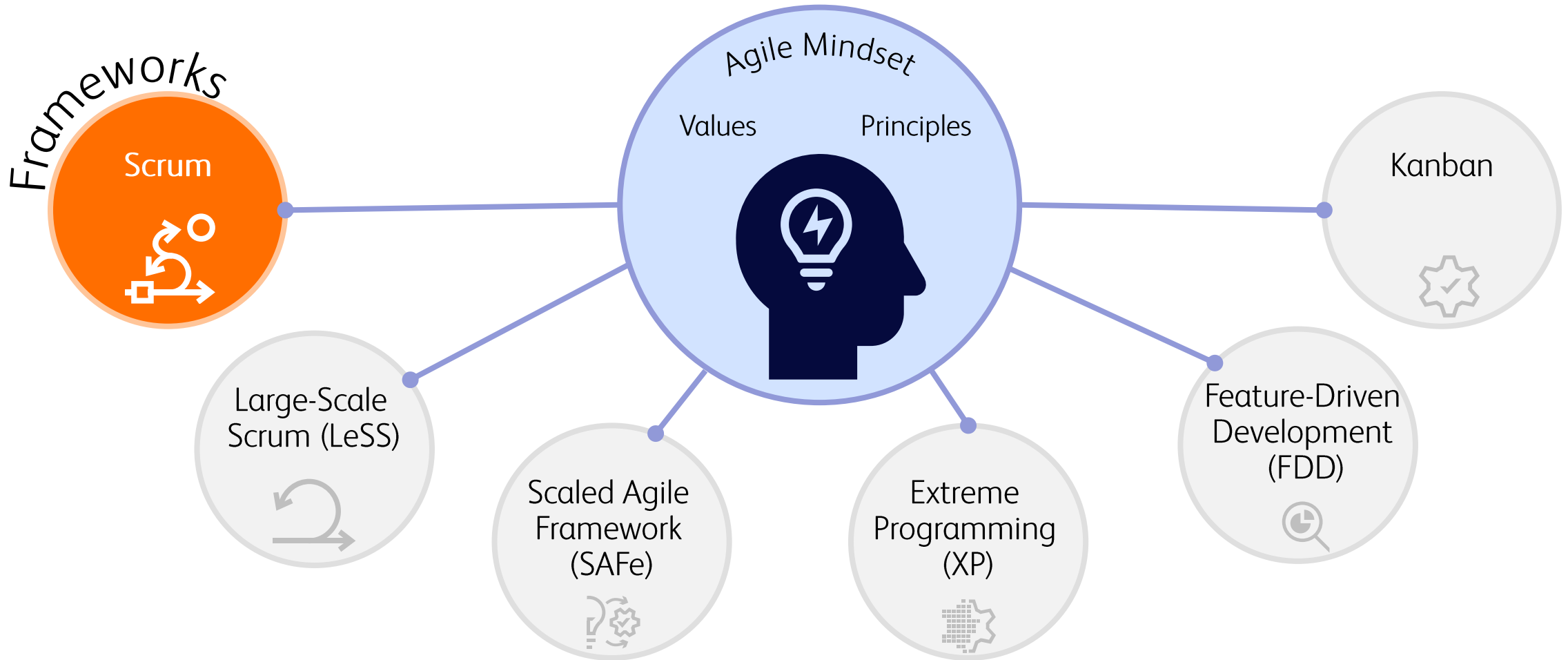
...Using a sprint-based approach to execute test and learn marketing initiatives and define work through a product backlog

We want:

- To timebox our project into chunks called sprints that will each help plan, build and run marketing initiatives
- Work with the team to improvise and collaboratively fill any gaps and mitigate barriers



There are many ways to “do” Agile, but they all share the same set of values and principles to “be” agile – we’ll be organizing our work through SCRUM



Global Standard

Competitive Omnichannel customer experience

Key Terms

Best-Practices

Benefits

SCRUM sets out simple rules to structure our work – three roles, two artifacts and four ceremonies



3 Roles

-  Scrum Master
-  Omnichannel Orchestration Team
-  Product Owner

3 roles ensure clear responsibilities





Refer to OOT roles and allocation

2 Artifacts

-  Product backlog
-  Sprint backlog

2 artifacts build the base for agile collaboration

4 Ceremonies

-  Sprint Planning
-  Daily DSU / SCRUM
-  Demo
-  Retrospective

4 events structure the project rhythm

Sprint-based approach is leveraged by Omnichannel orchestration teams to plan, set up and run test and learn campaigns

Illustrative



Global Standard | Competitive Omnichannel customer experience | Key Terms | Best-Practices | Benefits

Ways of Working

Agile Marketing
Agile Tools and Ceremonies

There are 2 SCRUM artifacts – Product Backlog, Sprint Backlog

Product Backlog



A visible, single, ordered list of everything that the Scrum Team needs to do

Sprint Backlog



A sub-set of the Product Backlog items that the team selects and targets to complete that Sprint

Our backlog is broken into two parts, overall product backlog and sprint backlog (1/2)

Type	Key	Summary	Assignee	Reporter	P	Status	Resolution
<input checked="" type="checkbox"/>	MCC-46	Targeting redefined based on Sprint 1	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-45	Content redefined based on Sprint 1	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-44	Channels redefined based on Sprint 1	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-43	Sprint planning	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-42	Demo held to illustrate progress	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-41	Sprint retrospective held	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-40	Results of test and learn identified	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-38	ASC1 [Sprint 2]	Rory Semple	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-35	Playbook medium decided	Rory Semple	Rory Semple	=	DONE	Unresolved
<input checked="" type="checkbox"/>	MCC-30	MLR approval for CDP/LTC1 assets	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-29	Campaign CDP/LTC1 execution starts	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-28	Media campaign setup for CDP/LTC1	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-27	Creative agency to make new CDP/LTC1 assets	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-26	Channel strategy specific to CDP/LTC1	diego.casanova	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-25	Marketing strategy for CDP/LTC1 [Final]	diego.casanova	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-24	Marketing strategy for CDP/LTC1 [Draft]	diego.casanova	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-23	Media campaign setup BH1	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-22	MLR approval process for BH1 assets	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-21	Creative agency to make new BH1 assets	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-20	Channel strategy specific to BH1	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-19	Marketing strategy for BH1 [Final]	diego.casanova	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-18	Marketing strategy for BH1 [Draft]	diego.casanova	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-17	Channel strategy and setup for ASC2	Brett Doucette	Rory Semple	=	TO DO	Unresolved
<input checked="" type="checkbox"/>	MCC-16	New creative assets for ASC2	Brett Doucette	Rory Semple	=	TO DO	Unresolved

Product Backlog

- Encompasses all aspects of project delivery including longer term objectives
 - i.e. Dashboard delivery by Rishi and Ganesh
 - i.e. Agency onboarding
- It contains the issue links for each individual sprint backlog
- The **product owner** owns the product backlog

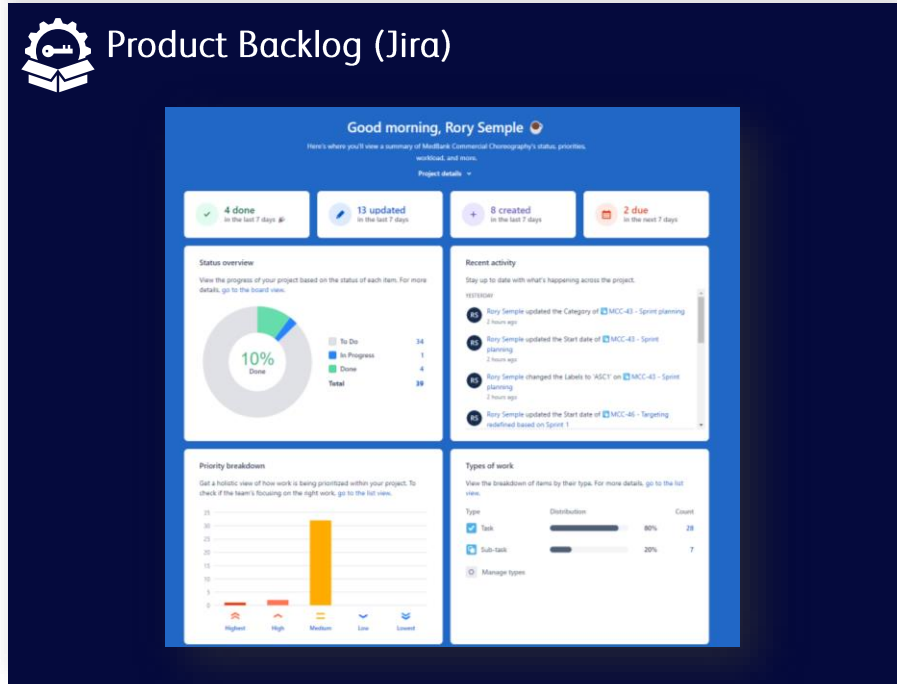
Our backlog is broken into two parts, overall product backlog and sprint backlog (2/2)

The screenshot shows a Jira sprint backlog for 'ASC1 [Sprint 2]'. At the top, there are navigation links for 'Projects / MedBank Commercial C... / MCC-38'. Below this, there are action buttons: 'Attach', 'Add a child issue', 'Link issue', 'Smart Checklist', and a menu icon. A 'Description' field is present with the text 'Add a description...'. The main section is titled 'Child issues' and shows a list of six issues, each with a status of 'TO DO' and a 'RS' icon. The issues are: MCC-40 (Results of test and learn identified), MCC-41 (Sprint retrospective held), MCC-42 (Demo held to illustrate progress), MCC-43 (Sprint planning), MCC-44 (Channels redefined based on Sprint 1), and MCC-45 (Content redefined based on Sprint 1). Below the list is an 'Activity' section with tabs for 'All', 'Comments', 'History', and 'Smart Checklist History'. A comment input field is visible with the text 'Add a comment...' and a 'Pro tip: press M to comment' note.

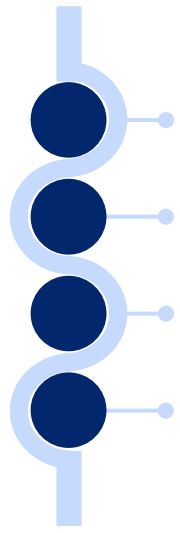
Sprint Backlog

- Contains specific tasks to be accomplished to achieve that sprint.
 - i.e. Sprint planning for Sprint 2
 - i.e. Channel definition for Sprint 2
- Sprints are populated with tasks and within those tasks are child issues that relate to that specific delivery
- The **working team, scrum master, and product owner** own the sprint backlog

We recommend using Jira, the project management tool, to manage product and sprint backlog



Step-by-Step Guide

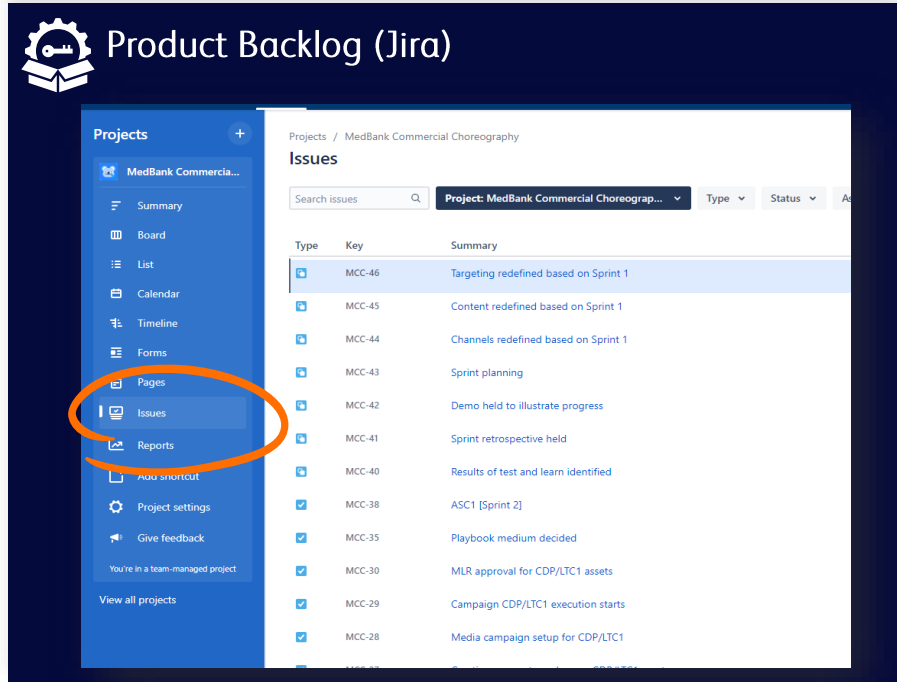


- Campaign orchestration team use Jira and assign key responsibilities to OOT team members
- Team members align on timeline of key responsibilities and activities to track in Jira
- Team members define objectives and goals to log in Jira
- Team members to track progress towards completion, and highlight any barriers or dependencies for success

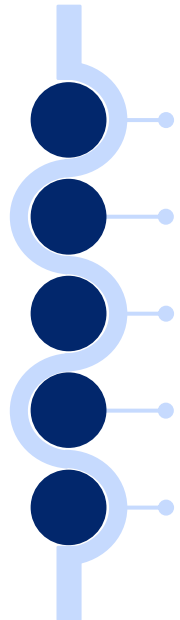
[Link to Jira \(Product Backlog\)](#)



To access the backlog in Jira Project Management, navigate to issues and use the filters to narrow down the view you wish to see



Step-by-Step Guide



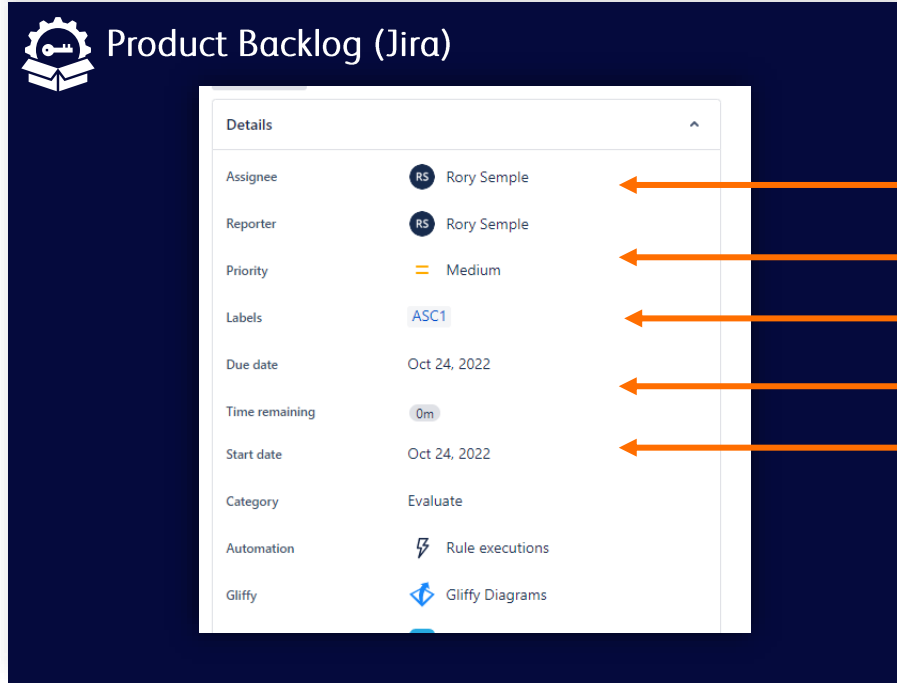
- Your product backlog will define the tasks required to reach objectives in our overall campaign

- To be able to narrow down tasks you (i.e., Product Owner, Scrum Master or team member) can select one (or a combination) of the following attributes:
 - Assigned to me
 - Label of sprint (e.g., ASC1)
 - Current status

[Link to Jira \(Product Backlog\)](#)



To maintain the Jira, we require self-regulated hygiene to ensure cleanliness and appropriate mark up



Step-by-Step Guide

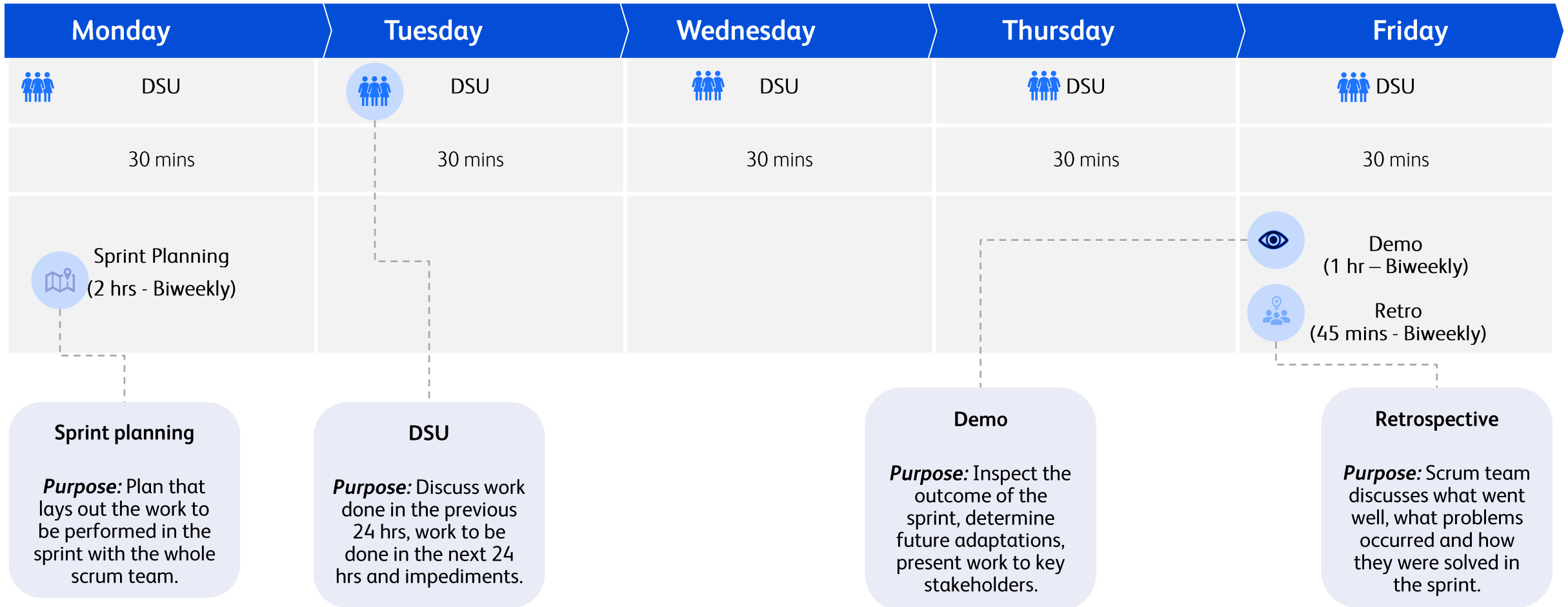
Issue Creation:

- Ensure the issues are aligned
- Prioritized based on perceived impact to the project
- Tag the campaign for ease of navigation
- Assign an appropriate due date for completion
- Consider the start date relative to the size and scope of the required ask

[Link to Jira \(Product Backlog\)](#)



Each sprint is facilitated by different ceremonies that each have a clearly defined purpose and cadence to drive results



Sprint Planning is carried out at the start of a sprint



Meeting where the sprint goal is determined, and work to be performed during the sprint is collaboratively planned, by the entire scrum team. Timeboxed to max one hour per week of sprint.

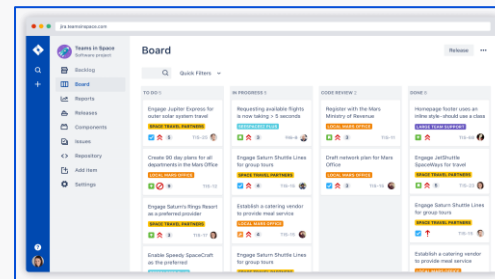
Agenda / Guiding questions

- **What can be done in this sprint?**
 - A sprint goal will be defined as the objective for the sprint
- **How will the chosen work be completed?**
 - Prioritized items are taken from the project backlog
 - The agile delivery squad breaks the work down into smaller packages and develops a plan to deliver the work. Both together make the sprint backlog.

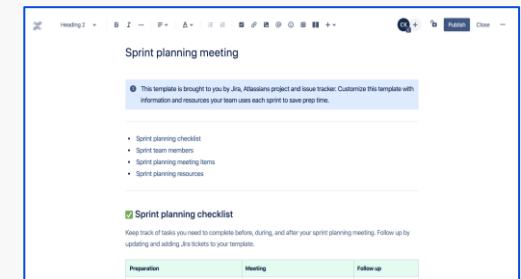
Attendees

- Scrum master (co-lead)
- Product owner (co-lead)
- OOT

Resources

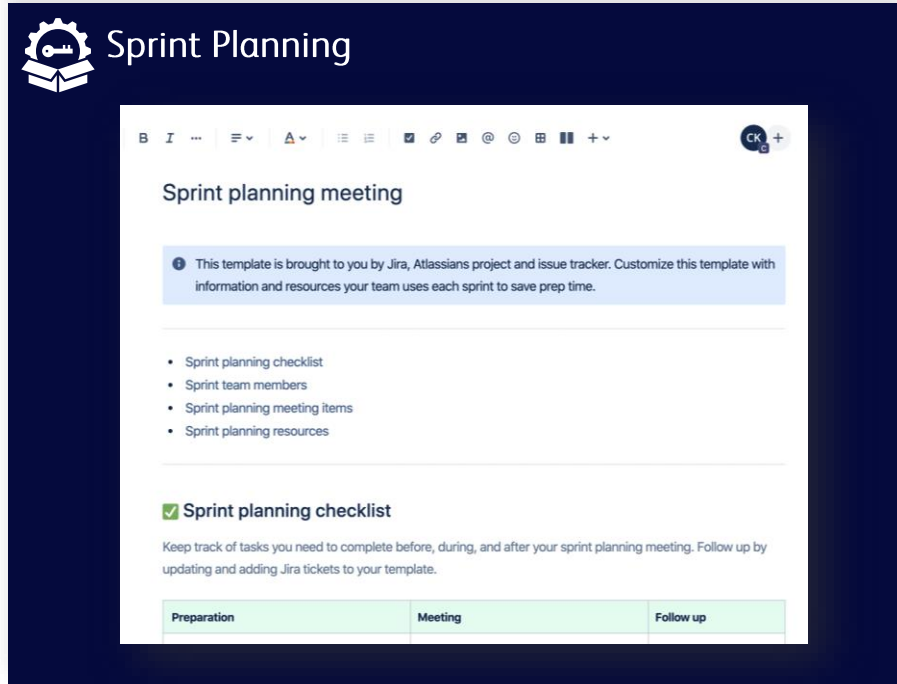


Jira Board



Sprint Planning Template

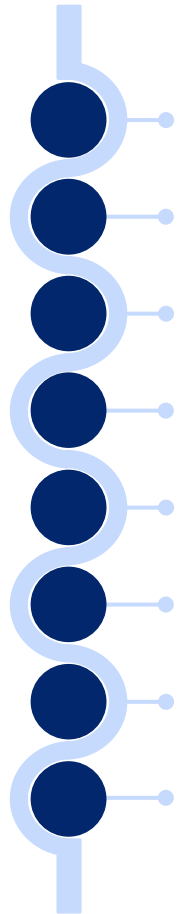
We recommend using a sprint planning template to help define sprint plan



[Link to Sprint Planning Template](#)



Step-by-Step Guide



- Product Owner to define sprint goal
- Product Owner to prioritize tasks in your sprint backlog
- Product Owner to assign tasks to team members
- Product Owner to set the duration of the sprint
- OOT to ideate initial strategy and campaigns ideas
- OOT to prioritize winning strategy and campaign ideas
- OOT to set daily goals and milestones
- Product Owner to track using project management tool
- OOT to identify sprint challenges, barriers and solution on mitigation tactics
- At the end of your sprint planning meets, you should have completed the list above

A Daily Stand Up (DSU) is carried out at the start of the day so everyone is aligned on the work to be done in the next 24 hours



Daily 30 minute morning meeting to synchronize activities, discuss impediments and create a work plan for the next 24 hours

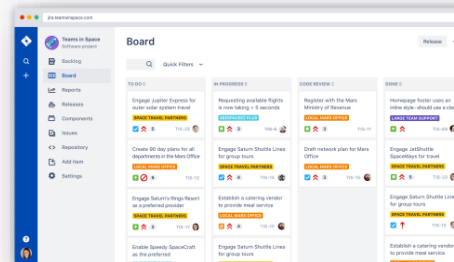
Agenda / Guiding questions

- **What did I do yesterday** that helped meet the sprint goal?
- **What will I do today** to help meet the sprint goal?
- **Do I see any impediment** that prevents me or the agile delivery squad from meeting the sprint goal?

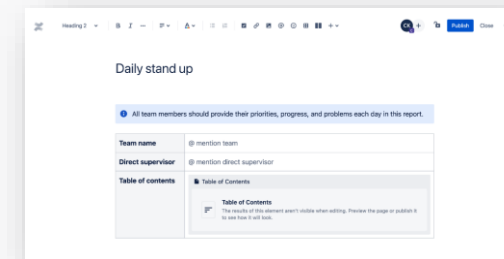
Attendees

- Scrum master (lead)
- OOT

Resources



Jira Board



Daily Stand Up Template

The demo takes place at the end of the sprint and the product backlog is adjusted (if required)



Discussion regarding the outcome of the sprint, determine future adaptations, present work to key stakeholders; based on that the project backlog will be adjusted if needed. Timeboxed to max. 1 hrs per week of sprint

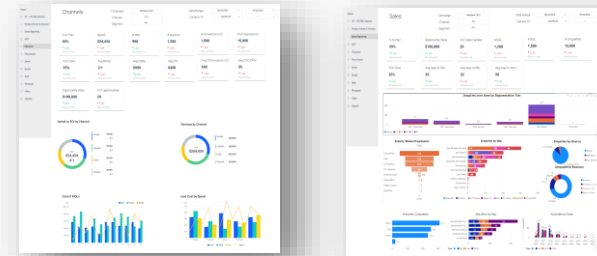
Agenda / Guiding questions

- Marketing Team demonstrates the work it has “done” and answers questions about the achievements
- The entire group collaborates on what to do next so that the demo provides valuable input to subsequent sprint planning

Attendees

- Scrum master (lead)
- Key stakeholders
- Product Owner
- OOT

Resources



DDA Developed Campaign Dashboard

The retrospective takes place after the sprint review and before the next sprint planning meeting



The scrum team discusses what went well, what problems occurred and how they were solved in the sprint. Timeboxed to max. 45 mins per week of sprint.

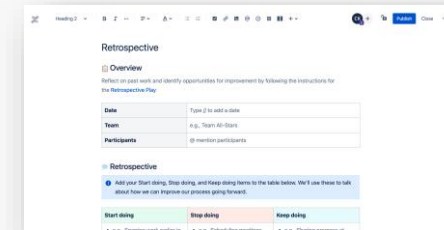
Agenda / Guiding questions

- How did the last sprint go with regards to people, relationships, process and tools?
- How can the way the team works be improve?
 - Usage of new tools
 - Changes in workflow or structure
 - Establish ways of working and new processes

Attendees

- Scrum master (lead)
- OOT
- Product Owner

Resources



Retrospective Template



Create a standing weekly block for optional group working time

To ensure team has dedicated space to regularly come together and solve problems



Proactively monitor and encourage ceremony attendance

To ensure the team know that ceremonies are not optional



Ruthlessly time-box ceremonies to ensure efficiency

To ensure ceremonies don't become a burden



This is difficult – that's okay

All teams find switching to agile tough at the beginning; sticking with it will yield great rewards



- 1 The agile way of working is **iterative** and there is incremental marketing and **continuous feedback**, which allows us to be more **customer-centric**. In the traditional waterfall way of working, customer feedback is only collected at the end.
- 2 The agile mindset drives 4 key **behavioral shifts**: Being people-centric, outcome focused, working in collaboration, and responding to change.
- 3 Many organisations have seen significant **business benefits** as a result of their Agile transformations, increasing their **customer satisfaction**, innovation, decision-making speed and process efficiency, as well as **employee engagement**.
- 4 **SCRUM** is one framework to operationalize Agile and is based on a “marathon of sprints”.
- 5 **MVPs** are key to the agile way of working, and they enable us to **continuously develop, test and improve** based on frequent customer feedback.
- 6 **SCRUM** sets out simple rules to structure our work – two **roles**, two **artifacts** and four **ceremonies**.