Assessing Your Agile Marketing Maturity Level

1. Customer-focused Cross-Functional Collaboration

1. Marketers see working deliverables frequently and use them to inspect and adapt their marketing plan/execution.

2. Marketing Value is planned, designed, built and delivered in iterative chunks cross-cutting across the marketing stack if necessary thereby increasing marketing agility – faster time to market and keeping more options open to what will be delivered later on.

3. Planning/Execution is aligned to objectives/goals

4. Frequently Inspect and Adapt with stakeholders/users beyond just the marketers on the team.
5. Work items are SMALL - can be delivered in days thereby tightening the feedback loop

2. Business-focused Customer Discovery

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3. Adaptive and Iterative Campaign Flow

1. Visualize who is working on what as well as in order to be aware of level of multi tasking and dependency on specific people.

2. Commitment to finishing work over starting new (eventually reaching a WIP level that "feels OK" for the team) to start to "weakly" constrain and improve flow.

3. Definition of what Done (Finished/Delivered Marketing Play) means is clear and adhered to ("DoD") so real flow is measured and so exceptions drive discussion/improvement.

4. Visualize work flow through the different process stages (using Kanban Board or similar) to create flow awareness

5. Planning is Continuous – Beyond the next few weeks there is a healthy mix of committed and uncommitted work – enabling business agility

6. WIP is limited across the system e.g. using Kanban WIP Limits, Scrum Sprint Commitment.

7. Visualize and focus on blocked work so major flow efficiency issues are addressed

8. Visualize work that is queued/waiting between people/workflow states to start raise to awareness reasons for queuing and identify options for reducing

9. Team is aware of different expectations for handling certain work types & people can make intelligent flow decisions according to the context

10. Visualize work variability and seek to reduce it (e.g. using Velocity/Cycle Time Control Charts) so that overall flow is improved.

4. Validate Learning / Run Small Experiments

1. Marketing Requirements that are Hypothesis are validated Using MVP (Minimally Viable Play) in a fast learning loop in order to enable safe/cheap-to-fail experiments about risky but worthy ideas.

2. Team has feedback loops (quantitative AND qualitative) in place to gauge effectiveness of the majority of marketing plays

3. Team actually leverages the feedback loops to inspect, learn and adapt.

4. Team runs multiple experiments each month

5. Team is able to A/B test a majority of marketing plays

5. Lean/Agile Leadership

1. Departments as "Community of Practitioners" rather than driving/controlling the work.

2. Leaders provide Alignment/Clarity through frequently sharing Vision & Context

3. Let TEAMS own the Customer Journey (& Pipeline) for their markets by specifying objectives but NOT tactics.

4. Leaders help out with key risks/issues their teams escalate.

5. Leaders help teams maintain flow through effective triage (Saying NO to unplanned work unless Value>>Flow, and even in that case decide what to STOP before saying "yes we can/should")

6. Leaders spend a significant slice of their time building competency of their marketers

7. Leaders avoid comprehensive detailed departmental reporting. They leverage agile cross-functional reporting/visibility/transparency together with "Go See/Gemba" – joining BRP/Demos/etc.

11. Leaders/Policies incentivize (formally and informally) lean/agile thinking - Flow, Improvement, Trust, Transparency, Whole Team, Low WIP, Safe to fail experiments, etc.

6. Respect/Empower Marketers and their Humanity

1. Frequent planning meetings (e.g. Daily Standups) are used by PEOPLE to manage/sync/plan their day to day work (instead of work scheduled by supervisors and pushed onto them)

2. Autonomy - People have a high degree of control over the project day 2 day execution – they choose which tasks to pull when, where to focus, how to deal with issues

3. Reason/Intent is communicated as part of every requirement/work item, to increase motivation as well as empower people to do the right thing for the context rather than blindly follow a plan

4. People pull to capacity at a Sustainable Pace - by using Team Estimation approaches or just pull to WIP

5. Autonomy - People have a high degree of control over their personal & professional destiny

6. Teams are involved in higher level planning and have the opportunity to take the initiative

7. Opportunity for innovation/creativity within the work and on top of the work (e.g. Hackathon).

7. Relentless Improvement

1. Regular Lessons Learned events are held frequently (every 1-4 weeks) with actionable outcomes (e.g. Retrospectives)

2. People at all levels are highly aware and involved in improvement activity

3. Actionable Improvement Work is visualized and managed using "Stop starting start finishing"

4. Improvement activity is focused on a team performance objective/goal

5. Team/Group allocates capacity/time slots for improvement work

6. Teams use experiments to drive improvement and innovate.

Why assess the level of Agile Marketing?

Teams, Managers and Coaches can <u>quickly evaluate the current capability</u> of a team/group, in order to:

- *See* how the capability measures **against the recommended level** for benefiting from marketing agility
- *Guide* the team/group on **what to improve** next
- *See*, over time, **the evolution** of agility (positive or negative trend)
- *See* **the impact** of the team/group improvement work
- *See* **the impact** of organizational/structural changes that are outside the team/group's control (costs reductions, distributed, etc.)
- *Motivate*! Get **acheivements and recognition** for reaching higher agility levels (Emphasize intrinsic motivation!)

Key Assessment Areas

Inspired by the Agile Marketing Manifesto:

- **Customer's journey-oriented cross-functional collaboration**
- **Flexible Value-oriented Planning/Execution**
  - Flexible vs. rigid planning - Responding to change over following a plan
- **Adaptive and Iterative Flow of Marketing Work**
- **Validated Learning / Many small experiments over a few large bets**

Inspired by Lean:

- **Lean/Agile Leadership**
- **Respect/Empower Marketers and their Humanity**
- **Relentless Improvement**

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2. Flexible Value-oriented Planning/Execution

Dimension

1. Marketers see working deliverables frequently and use them to inspect and adapt their marketing plan/execution.

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Novice

3. Planning/Execution is aligned to objectives/goals

Advanced Beginner

4. Frequently Inspect and Adapt with stakeholders/users beyond just the marketers on the team.

5. Work items are SMALL - can be delivered in days thereby tightening the feedback loop

Competent

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1. Customer's journey-oriented cross-functional collaboration

1. All people involved in a work item work on it more or less in the same time period (Product Marketing/Content/Digital/Field/Sales) minimizing the overhead/waste from context switching/recalling past work.

2. 80% of the people are working on only one team at each point in time and 80% of their time is spent on team goals rather than departmental goals.

3. People work on cross-functional customer-journey oriented teams that where they can easily collaborate across functions to maximize marketing impact and effectiveness.

4. Most teams are relatively stable (Not ad-hoc teams recreated every couple of weeks)

5. Team environment is as collaboration friendly as possible

6. People pull work outside their natural function in order to make the team more flexible and effective. (T-Shaped Marketers)

7. Significant aspects of goals and rewards are oriented towards team performance/goals (rather than individual performance) driving collaboration not just individualism.

8. People work in small teams (not more than 10, ideally around 5-7) enabling good communication and direct collaboration as well as effective meetings and interaction

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The Scale

- Option 1
  - Yes/No

- Option 2 (Inspired by www.AgendaShift.com)
  - Not/Barely started
  - Early gains
  - Getting there
  - Crushing it, Consistently

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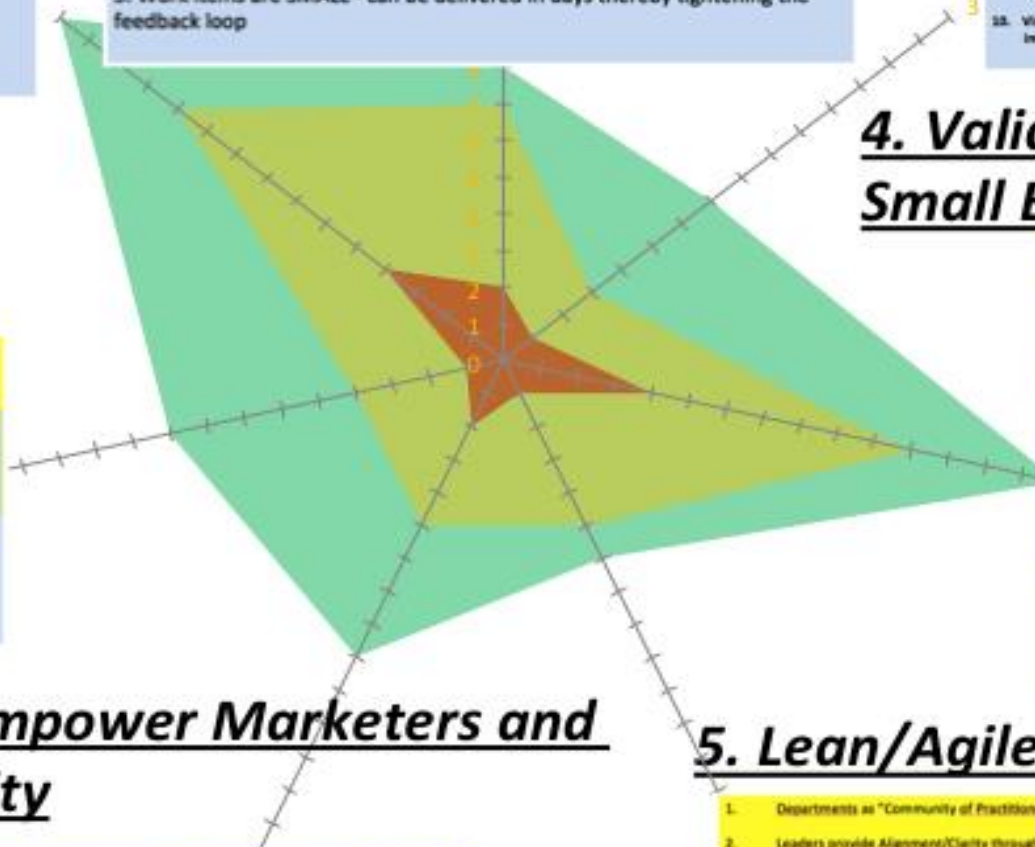
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How to use

- Go thru the dimensions, and assess level of maturity for each question.
  - Use "constellations" physical exercise, "planning poker" style discussion to look at gaps, or something like pollev/kahoot.
- Summarize across dimensions
- Identify dimensions to focus on in improvement work

- For more help to figure out how to use this – feel free to contact Yuval.Yeret@agilesparks.com

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References/Attribution

- AgileSparks Lean/Agile Depth Assessment - www.slideshare.net/yyeret/leanagile-depth-assessment

- Agile Marketing Manifesto - http://agilemarketingmanifesto.org/