Lean & Agile Marketing with Kanban

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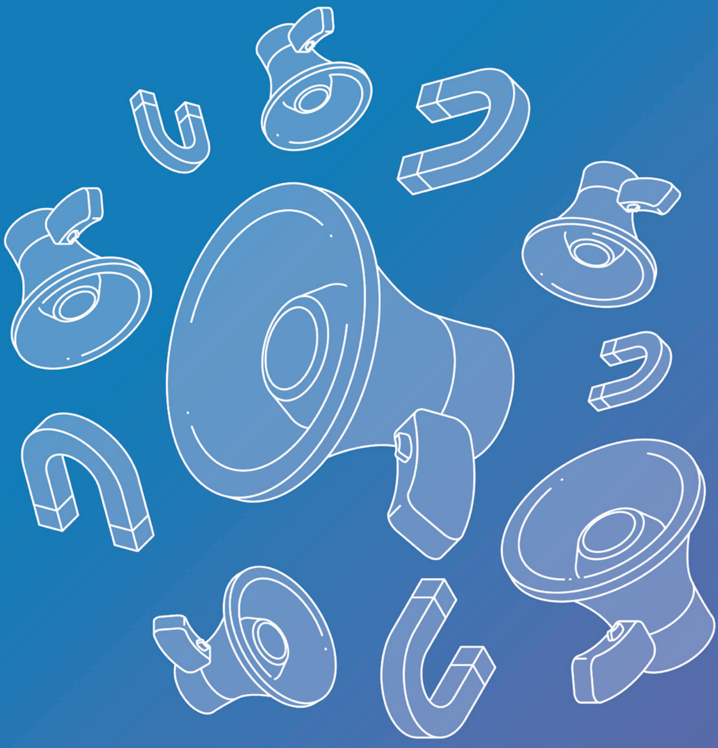

kanbanize

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INTRODUCTION

The marketing process needs an intervention.

If you're a marketer who has picked up this eBook, chances are you have either been tasked or have tasked a team member with the creation of a detailed Annual Marketing Plan for a product or service at some point in your professional experience. The pitfalls of this approach are that that same marketing plan typically does not survive longer than 2 or 3 months because something changes. Something always changes. The results are poorly allocated budgets, missed deadlines and a whole lot of unhappy people. Maybe that's why in many, if not most, organizations, marketers seem to get a bad rap.

The department itself is stuck between product management and sales, supporting both, not completely understood by either. Approaching their role from a different angle could allow marketers to take a much more dominant leadership position in the business by exerting influence on all areas of the customer experience during the life cycle. Yet, poor management, lack of visibility and difficulties in communication seem to be holding marketers back from unlocking their full potential as individual contributors and as teams.

Thomas Barta, author of "The 12 Powers of a Marketing Leader", conducted a survey that came to three very troubling conclusions about the way modern marketers are perceived and how they perceive themselves:

» Marketers are seen as the most stressed out staff: **20% of all bosses believe marketers never seem to be able to complete all their work**.

» Perhaps it is no coincidence that bosses give marketers strikingly low reliability scores: **just 49% believe marketers uphold high performance standards**.

» When CMOs were asked about their focus level, **only a sobering 60% said they were very focused**.

The deterrents holding marketers back from being focused, effective and reliable can be distilled down to five main challenges that they, as a field, have not yet overcome. Recent studies conducted by the American Marketing Association show that almost all marketing teams, no matter their size, face similar problems. Marketing managers name the following as the toughest obstacles they believe they need to overcome in order to be optimally efficient and effective in their teams:

- lack of communication with other departments (mainly sales and product management)
- lack of experienced staff
- lack of reporting
- lack of budget
- lack of expectation management with executives (ex. routine marketing plans for a year ahead)

These five core challenges have defined the way marketers are perceived within their organizations and the limits of their influence within the business. Ironically, it is precisely the marketer role operating in a product or service company that should actually have the most purview. Being intrinsically linked with the development of the product itself as well as the relationship of the customer to that product, marketers can guide every interaction with their offering. Unfortunately, it is the antiquated way in which marketers widely operate that is holding them back from rising to their true potential of overseeing customer relationships throughout the entire customer lifecycle, as opposed to only influencing what they directly manage.

Marketing's traditional methods struggle to sustain the demands of dynamic, fast-paced projects with many stakeholders and involvement from various departments because they do not place enough emphasis on visibility and communication on a daily basis. The process model currently in use relies on the fact that marketing teams, as a separate entity, can reliably predict the future—but, more often than not, that isn't the case. It also relies on the fact that marketing teams, just by virtue of their interconnectedness with other departments have established healthy communications channels with all of them. By exploring implementations of alternative methodologies that were designed to be more inclusive, flexible and adaptable to change, such as Lean & Agile, this eBook will make a case for marketing organizations' adoption of other process models more conducive to their operational success.

Applying the principles and methods for managing work, such as Kanban, that have been tried and tested in other industries, and using them in order to adapt to the increasingly malleable and iterative nature of modern organizations might be exactly what marketers need to go full throttle. Interviews with subject matter experts, case studies with real companies as well as practical discussion on applying these new methods will reveal the untapped opportunities that can transform any marketing workflow into a more efficient, stable and effective process.

CHAPTER ONE

How did I end up writing about the methods of Marketing?

While I was interviewing all the experts, some of my peers were literally partying in Ibiza.

Three years ago, I began my career in the communications industry, fresh out of university in Toronto, with an English Literature degree under my arm. Rose-coloured glasses on, I was totally oblivious to any of the challenges that might be plaguing the field to which I had set my sights—namely, marketing. If you've ever met people with a liberal arts degree or are one of those people yourself, you'll know that there are 2+ mandatory internships that you need to participate in after you graduate, or else the real world does not admit you. I had heard of this unwritten rule, consequently, an internship in the editorial department of a Canadian publishing house for poetry and novellas followed. Ready to dive into the more specialized realm of content marketing, I took an assistant position with the communications lead at a coworking space that was part of an impressive international network. The assistant position was a glorified internship, but I loved every minute of it because it let me develop two skills I believed to have been repressing—writing (essays don't count) instead of correcting and event organization (birthdays don't count).

With the two completed instances of the much coveted "work experience" under my belt, I felt confident enough to apply for a proper, full-time position at a company where I imagined myself growing as a professional. In both previous cases, my involvement was part-time and only included executing small tasks that I could not really place in the context of larger projects.

Selectively sifting through the various job offers, I applied for only two positions and was invited to interview for both. The first was a digital communication and public relations operation handling regional work for some exciting luxury brands, the kinds you hear about celebrities wearing in Cannes. The position was advertised as Account Executive, which sounded very Mad Men to me at the time.

The second, was a Marketing Manager position at a local software company called Kanbanize that had been funded by a venture fund I recognized from my work in the coworking space. I admit that the business itself as well as the position sounded a bit daunting. I had never worked in software, I had never managed a marketing team. In fact, the thing I considered that I needed most at the time was to be managed and learn from example. What drew me into Kanbanize's ad is how they positioned themselves—"Our software helps other businesses grow and achieve their productivity goals." Even stronger was the claim—"We love what we do and you'll see it when you meet us."

My first interview at Kanbanize was with the CEO (Dimitar) and COO (Bisser). Needless to say, I was intimidated. They explained the goals of their platform and the origins of the Lean principles upon which it was based. They piqued my interest about the Kanban method and how their software helped businesses apply it. During the conversation, it became clear to me that I could learn a lot from both of the people sitting across from me. It also became clear that the need to hire a Marketing Manager at Kanbanize had come about from the fact that there was no marketing team to speak of… yet. The company had recently developed its product and grown its international customer base, through the efforts of the founders and the development team, to a point at which they needed separate leadership in the inbound Marketing department.

Our conversation revolved around values and the common eagerness to learn more about the things we could do to triple and quadruple Kanbanize as a business. As I was walking out of the building, they called to schedule a second meeting. Soon after that, they made me an offer.

Parallel to my talks with Dimitar and Bisser, my interview process with the digital communications company was moving towards a similarly positive culmination. Eventually, I would have to choose to join one or the other.

Choosing regional and familiar over international and unexplored.

After a regretful email to the cofounders of Kanbanize, I chose to join the digital communications and public relations company because, at the time, it seemed like the type of industry that could incubate a lot of the skills I had already been working on. As an Account Executive, I could learn about the process of providing marketing services to all sorts of powerhouse brands that were active locally, create digital strategies for their marketing campaigns as well as work directly with brand ambassadors to co-ordinate events.

Part digital marketing agency, part traditional PR, this organization is the environment in which I was first exposed to the real trouble with marketing agencies and departments as it persists today.

From day one, the structure of the organizational process seemed broken. As a new member of the team, and a fresh pair of eyes, many of these process flaws became apparent to me from the get-go.

Here are some of the symptoms I saw—the actual condition causing these and its cure will be revealed in the coming chapters:

The process policies were undocumented, save for several binders of contracts and loose printed emails that comprised the history of the PR company's official relationships with the brands they represented.

Several Cloud storage solutions housed all of the projects that had been completed by the agency, even those that were not carried out, in other words, the inventory. The art department's inventory seemed even larger than the projects that had been realized.

Work requests were sent as e-mails, chat messages or just shouted across the room. Many of these were forgotten in transit and it wasn't clear who was responsible for what.

The manager, an obvious Devil Wears Prada aficionado with a penchant for dramatics, requested reports with success metrics that remained undefined. What were we meant to measure? What were we aiming for?

On my first week, I was given an entire account as well as an intern of my own to help me with the project. At the time, I was flattered, but now realize the reason behind this decision was the **lack of experienced staff**. The high turnover of staff, which I had heard about, but not considered seriously, meant that a lot of people were in training.

I had no idea what the other people around me were working on, so I would go around asking them and felt like I was constantly interrupting.

> A huge chunk of the day was spent in **internal meetings**.

Some people seemed to live in the office, others took 3 hour lunch breaks. Not cool.

> Apparently, we were behind schedule—with **every account**.

My role was to act as account manager to several smaller customers and build on existing strategy for their annual goals. Existing plans for these accounts were ridiculously detailed and explained the goals of strategic initiatives, why these specific smaller campaigns fit into the strategy and the budget allocation one whole year in advance for each account. These plans manifested in the physical world as endless excel spreadsheets with no specific discussion about 'the How' of executing these lofty goals. How were we supposed to work together in achieving them, if we couldn't align around the way we would work to achieve them together?

In recalling my two meetings with Kanbanize, who dealt in helping other businesses optimize their process, and in trying to answer this question for myself, I came up with some conclusions.

Conclusion 1: Marketers structure their projects using an antiquated process model.

The predominant method used by modern marketing teams, including the team I had just joined, for structuring their projects is referred to as the Waterfall method, a sequential design process without iterations. Its name isn't fancy terminology, it just refers to the way the process—supposedly—flows steadily downwards, like a waterfall, through the phases of conception, initiation, analysis, design, construction, testing, production/implementation and maintenance. It's widely used in the software development industry. The problems with Waterfall became painfully apparent when the companies that were using it became aware of the vast amounts of resources they were wasting trying to make a rigid project plan work for their customers' changing business needs.

The main problems with the Waterfall model in relation to any process, not just the development of software are that:

- It assumes that all requirements can be defined at the very beginning of a project.
- Is not a suitable model for accommodating any change at all over the course of the project.
- The working version of any project is not seen until the end of the project's life—so it can't be tested in any way beforehand.

Waterfall Software Development	Common Challenges of Marketers
• Problems are rarely known and often it's too late to fix them when they are • Need more experienced staff • No feedback loops in process • Projects go over budget • lack of expectation management with leaders (ex. development plans for a year ahead)	• lack of communication with other departments (mainly sales and product management) • lack of experienced staff • lack of reporting • lack of budget • lack of expectation management with leaders (ex. marketing plans for a year ahead)

At the end of the day, it turned out that real projects were rarely sequential and calling them sequential meant everything was delivered later than promised and almost all initiatives ended up over budget. When all predictions don't come through because they are based largely on wishful thinking, disappointment on all levels of the organizational hierarchy follows.

The problems the Waterfall process model carried with itself into the software space when it first became the norm were strikingly similar to the problems that marketers are dealing with in present day. They're basically the same problems because they are closely tied to the flaws of the same defunct approach to project planning.

True to the deficiencies of a Waterfall approach, most of the initiatives we were currently working on at the marketing agency when I joined the team were not described even in the minute details of the existing plans, but had "just come up" along the way, proving that the project was not sequential after all. We were off course in our attempt to accommodate situational changes to the initiatives we were working on.

What they lacked in discipline, they made up for in creative energy—or so I thought. Until, on my second month there… **we lost a customer that accounted for 60% of the annual revenue of the agency**.

It was definitely a blow, financially to the organization and on a personal level to the team members themselves because no one had seen it coming. The senior staff at the agency admitted that they were not sure what they would have to do now. They were not used to having to compete for their customers because most of their accounts were "forever clients" who had signed on for several years and outsourced all of their marketing efforts to the agency. Even though quality work was being produced, it was reaching the customer base sporadically and someone had taken notice. It reminded me of the "too big to fail" discussions that dominated the economic landscape during the crash of 2008.

> Predictably, things started going downhill after the loss of the top breadwinner of our business.

In the aftermath of this event, I started doing some more research about the challenges that marketers and marketing agencies were facing on a more general level and what solutions people had tried. A lot of what I found out from literature and from my mentors is summed up in this book. A year after my stint at the marketing agency, an article in Forbes called "How Agencies are Putting Themselves Out of Business and What We Should Do About It", by Keenan Beasley, summed up the core of everything my research produced. "The traditional 'media marketing mix' is flawed. It's a pinpoint in time, usually compiled long after a campaign is complete, and rarely takes into account anything that takes place before the swipe of a card," the article proclaimed. It turned out that it had been a process problem all along.

Conclusion 2: Planning a process as if it will flow steadily through its consecutive stages caused trouble for teams in other industries too, not just marketing.

Graphic representation of the difference between the three most popular models used for design processes, in, but not limited to, the software industry.

Historically, the field of software development had planned all of its projects using the Waterfall method. However, they ran into the same problems that marketing was suffering from now. That is when alternative models, such as Agile (Scrum) and Lean (Kanban) popped up in the software industry. They represented a very different way of executing larger projects.

Both Lean & Agile permeated the industry as topics of discussion because of their aim to achieve high quality, speed and customer alignment—things that development teams were having difficulty achieving with their current methods. Unlike Waterfall, these methodologies did not aim to predict the future, but rather, put policies and principles in place that would ensure the process itself could run as smoothly as possible throughout. Being Lean (instead of wasteful) was at the core of everything.

The seven main values of Lean methodology, as they became and still are popular in the world of software are:

1. Eliminate Waste
2. Build Quality In
3. Create Knowledge
4. Defer Commitment
5. Deliver Fast
6. Respect People
7. Optimize the Whole

Similarly, Agile was conceptually put forth in the form of the Agile Manifesto, which aimed to put an end to heavyweight methodologies that were crippling software projects. The main principles of Agile come down to:

1. Highest priority is customer satisfaction
2. Welcome changing requirements
3. Frequent delivery of software
4. Business people & developers cooperating daily
5. Build projects around motivated people
6. Face-to-face conversation is best
7. Progress measured by working software
8. Sustainable development pace
9. Continuous attention to technical excellence
10. Simplicity
11. Self-organizing teams
12. Regular reflection & adaptation

These principles in combination represented the antidote to the unrealistic solutions that Waterfall had been pushing up until this point.

Conclusion 3: Marketing is in a favorable position for an implementation of Lean & Agile principles.

Studies show that marketers are even more predisposed than software developers to try something new and adapt themselves to it. Despite the rather disappointing statistic about CMOs' ability to focus, the reliability of their predictions and their problematic stress levels, when 1,200 CMOs were asked to rate themselves, 90% strongly agreed that they are open and creative, so maybe there is a light at the end of the tunnel for marketers. In other words, if marketers were to pursue the implementation of Lean and/or Agile en masse in their organizations, it should take them an even shorter time than it did the IT community, a large section of which are considered more conservative and introverted, to see results because of their natural inclination to be open to novelty and to make use of it creatively. There were two methods that could be applied to the structure of our day-to-day work process in order to help us apply the principles of Lean and Agile. The methods of application for Lean and Agile are called Kanban and Scrum, respectively.

Scrum in 30 Seconds

In a nutshell, the process that Scrum advocates looks something like this:

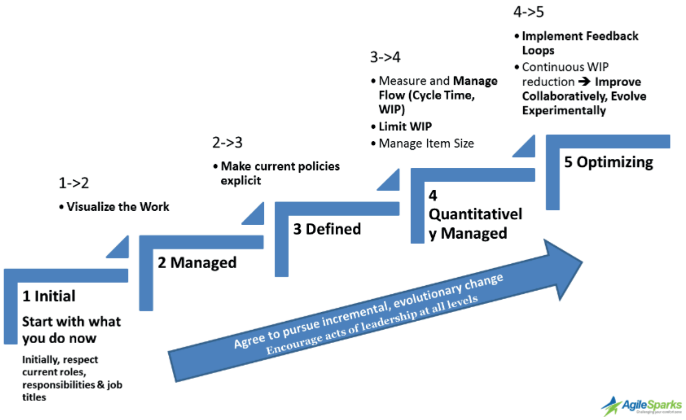
In the early days of Agile development, the Scrum method used sprints (spurts of activity during which the team completes work items for a given project) in order to break down a larger initiative through time. The sprints were generally two-week periods during which prioritized work items were actively worked on and then got released to the customer at the end of the two-week time frame. During the course of the sprint, the following takes place:

1. A product owner creates a prioritized wish list called a product backlog.
2. During sprint planning, the team pulls a small chunk from the top of that wish list, a sprint backlog, and decides how to implement those pieces.
3. The team has a certain amount of time—a sprint (usually two to four weeks)—to complete its work, but it meets each day to assess its progress (daily Scrum, also referred to as a morning Stand up meeting).

4. Along the way, a Scrum Master keeps the team focused on its goal.
5. At the end of the sprint, the work should be potentially shippable: ready to hand to a customer, put on a store shelf, or shown to a stakeholder.
6. The sprint ends with a sprint review and retrospective.
7. As the next sprint begins, the team chooses another chunk of the product backlog and begins working again.
8. The text above as well as other resources, if you are curious to learn more about Scrum, can be found on the Scrum Alliance's website.

Kanban in 30 seconds

The Kanban system is a Lean method that enables an organization to visualize its working processes and encourages a collaborative culture, however complex and multi-stakeholder that organization might be. The Kanban method originated from Toyota's Production System, which was developed in the 1950s, and began as a simple signaling system for its manufacturing workers referred to as the production kanban. The name is derived from two words "kan" which means visual/visualization and "ban" which is card or sign. The diagram below, courtesy of Agile Sparks, the members of which you will hear more from later in this book, illustrates the essentials of applying Kanban in any team, no matter the industry.



"At the core of Kanban lies a paradox: by limiting the amount of work we do, we become more productive," begins Andrea Fryrear (who you will also hear from later in the book) in her blog post on Kanban for Agile Marketing, originally published on her website. This notion, in addition to the others that Kanban promotes, resonates with marketers on a deep level because it tackles three of their most acute individual and team pains, namely, multitasking, context switching and overloading of team members.

Unfortunately, the agency I had just joined was not quick enough to recover from the loss of its main client to focus on its process, and went on hiatus instead. This was not the way I wanted to start out my career, so I went back on the job market.

I think, in comparing the agency I had chosen, over the process-centric, Lean company I had interviewed at recently, I already knew that I had found a place where I could fight for a new cause I had seen causing trouble firsthand and, this time, do it with the right mentors. That same day, I wrote an email to the CEO of Kanbanize, Dimitar Karaivanov, sharing my experience from the last several months. It had influenced my perspective on the barriers keeping people from working collaboratively and productively. Luckily, the position for Marketing Manager was still open, his reply to my e-mail was, “You made my day :).” It later turned out that they had interviewed dozens of people while the ad had been live—a whole 6 months before I accepted their offer!, but all of them came bearing a rigidly formed Waterfall mindset that wasn’t conducive to the formation of a Lean team.

On April 6th 2015, I officially became a Kanbanizer. Our goal became to bring the Lean principles for optimal process management to as many organizations as we could through the Kanban method and Kanbanize’s signature product.

CHAPTER TWO

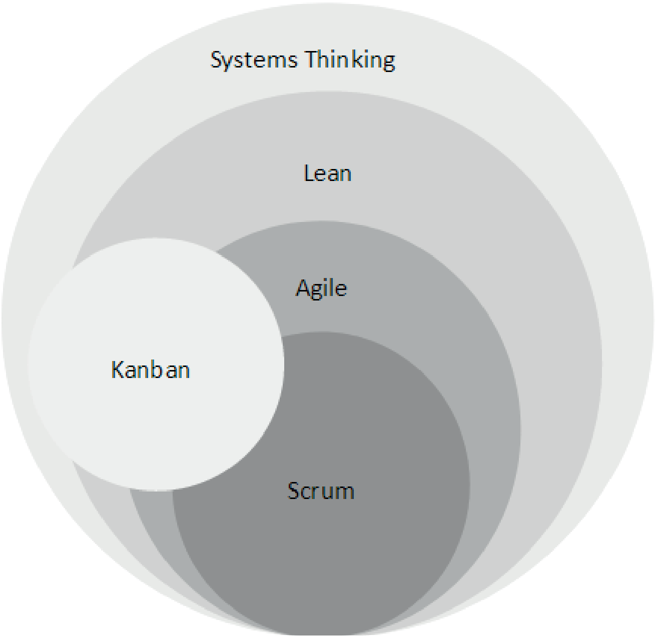
Kanbanize's Inbound Marketing Team

I have been working at the intersection of technology and creative only for 2 years, which, compared to some Marketing behemoths with decades of experience, is an extremely short time. Although short, I think a more appropriate word for my experience in this field is condensed. In the past two years, I have been fortunate enough to encounter many marketing teams that have transformed their process into a Lean & Agile workflow for best results. I have only encountered one single marketing team that started out Lean to begin with—the Kanbanize Inbound Marketing team. From the initiation of the very first member of the Kanbanize marketing department (that's me!), it was clear that the process would run much like that of the software developers in the next room. In a small part, it might have been due to the fact that the leadership team was made up of three engineers with leadership experience who had seen it all and knew that Lean, if applied correctly, can work to optimize any workflow. In a larger part, it was for the goal to create a flow of valuable content from the strategy of the developers, through the prism of the one-man army marketing team, and towards the existing customer base of the Kanbanize platform. Additionally, in governing the processes of all departments in Kanbanize using the principles of Lean, we were hoping to be able to close the communication loop between the team of developers, the single marketer and the organization's salespeople.

I had never heard of the Kanban method at all before I was brought in by the CEO of Kanbanize to put together a "mean, Lean marketing machine" with the help of the founding team. The process of building the team was an education in an alternative, just-in-time (JIT) way to market SaaS products that I have since come to evangelize and promote. In the beginning, the use of the Kanban method was influenced by the basis of the platform we were about to promote. However, it turns out that there is actually a strong argument for marketers privileging Kanban over other methods of applying Lean & Agile. After observing the daily work of marketers throughout his career in the field, Roland Smart, VP Community Marketing at Oracle, in an interview for this eBook, acknowledged that, "for the majority of marketers, it is much easier to onboard with Kanban rather than Scrum or Scrumban. It's a much less prescriptive method, it's easier for marketers to start with it. I have seen marketers in the past trying to embrace a more prescriptive method, but they overwhelmed their teams and it set them back a lot. Generally, I think it's easier when you're practicing Agile to add practices and make your method more robust and Kanban serves that well. When these same marketing teams were given an opportunity to restart the process of adoption, they started with Kanban and met in the middle between Lean and Agile."

In fact, there are two reasons that Kanban is a go-to starting point for many teams who are new to Lean. One of the main advantages of Kanban above other methods is that it encourages those who apply it to start with what they are already doing, instead of turning all of their processes on their head in order to accommodate Kanban in the very beginning. Typically, they tend to build on their existing practices and apply more principles of Lean and Kanban as time goes on and their implementation matures.

Further, Kanban is a great unifier of various proven methods because it takes on the strongest elements of Lean, Agile and aspects of Scrum in order to achieve an optimal combination.



It's time to add a disclaimer here. Since our team started out Lean under the guidance of a Lean guru with topnotch training in the subject matter under his belt, we never truly experienced the common problems that plague larger, less flexible marketing teams or agencies. However, I will explore and comment on some of specific aspects of the way we started out working that shielded us from exactly these particular, entrenched problems that I had observed firsthand at the agency from which I had just moved on. While our team scaled, we realized the exceptional approach we were applying and became more interested in the problems we could solve for other teams just like ours. We validated the assumption that there were other marketing teams out there that could benefit from some of the best practices we had borrowed from our software development colleagues and found that, like us, they could not afford to waste their precious resources, such as time and budget, on whims. We were in the same boat as most other marketing operations in which the team members are creative, but not inherently methodical.

The goals of most small to mid-sized marketing teams out there tend to revolve around:

- Conserving their time resource, meaning they needed to be faster
- Staying competitive with rival companies that already ran established campaigns in the same value network, meaning they needed to be even more effective
- Allocating funds only for high impact campaigns that could be tracked, meaning they needed to be efficient

We were going to do our best to achieve these goals and we viewed the Lean method of Kanban to act as a vehicle for the success we planned for.

I will now share some details about how our Lean Kanban team perceived the principles of Lean and applied them on a daily basis in order to counteract the challenges of modern day inbound marketing teams, what worked for us, and what didn't.

Part of the Kanbanize team at the monthly all hands meeting

I admit that the strategy was somewhat blurry in the beginning. The company had been without much of a public presence and there was little to use as a foothold for progress. Some actionable aims based on previous marketing efforts the team had executed even before I joined were:

- Social media is not a channel that converts, organic seemed to be most promising.
- Content is king, but only if it's kickass and people show their appreciation publicly.
- We are not measuring enough of the right KPIs.
- We would need a designer (there was no designer!)
- We needed to update our lead generation campaign strategy and get more trials.
- We would need to be extra efficient, because our competitors had the upper hand in terms of the size of their marketing operations.
- We should aim to optimize what was already showing signs of working, as opposed to launching experiments based on assumptions alone.

As a general approach, we wanted to make sure we emphasized our alignment with the first principle of Lean, namely, Value. As a policy of the team, from the very start, we would only work on the ideas for which we saw demand in our value network and addressed the users who could use our SaaS product to solve a particular set of problems. In other words, we eliminated ideas that would not target our value networks directly or that we could not validate using a data-driven approach. Anything under the vague but familiar hat of “brand awareness”, projects such as billboards, ads in a social media that is considered fun instead of professional, and floating pamphlets had to go.

Cultivating a value-driven mindset is difficult in any team, not just in the field of marketing. What was unique to how we did it at Kanbanize was the dedication to the theory of Lean and the ongoing investment, on the part of the leadership team, that went into educating Lean thinking in new members over the course of our growth.

As a result of:

- Lean Crash Course sessions with our Lean guru in-residence, Dimitar
- The ongoing development of a small library of marketing books that spoke to our relationship to process and the way we wanted to approach our work
- Participation in all sorts of webinars on Lean in other industries
- Customer discovery calls with companies that were already practicing the Lean principles
- Presentations between team members (that came a bit later as our team size tripled and quadrupled) for the purpose of knowledge sharing

Our team focused on marketing hacks that would build upon each other and continue to bring returns (measured as number of new trials, increased traffic to our website, SEO benchmarks or even accumulated data from experiments) even after we had shifted focus to a different campaign. For example, we opted for building high-quality content, link-building with industry influencers and landing page conversion experiments instead of social media, television ads, billboards and the like. As Lean marketers, we found ways to measure each of our endeavours and allocated a more significant bulk of the budget only towards campaigns that showed promise during the experimentation phase—a stage in our workflow, as shown on our Kanban board.

As it stands right now, most modern marketers rely on a combination of CRM tools, copious excel charts, digital calendars and physical notebooks in order to stay organized. This multiplicity as well as their predisposition to multitasking (those who favor the right hemisphere of their brain have this tendency) means that they end up neglecting to structure, manage and improve their actual workflow—the stream of daily tasks that their team members take on in order to deliver value to their customers. We decided to use the Kanbanize platform in order to place an emphasis on our marketing process and unify the various tools we would typically use for managing our tasks. We recognized that tracking all of their work items from initiation to completion using explicit policies in a way that allows us to collect data from the process as a whole can be beneficial in several ways:

- It can help keep track of cost of campaigns in relation to other metrics.
- It can help us report to each other, our external stakeholders and to higher management.
- It can nurture knowledge sharing and continuous improvement.
- It can help align with other continuous deployment models in their organizations.

We aimed to create a flow of marketing efforts that would make us more visible to our existing customers as well as potential users of our platform. Each campaign enabled its preceding and following campaigns in building a stable stream of content towards our target audience instead of an expensive blitz.

Building on top of the first principle of Lean, is the creation of a value stream (the second Lean principle), which meant that we wouldn't deliver value in spurts, but in a continuous, stable flow towards our current and potential customers. We tackled the challenge of structuring our process and creating a pipeline for our measurable campaigns and the tasks associated with them. Although most creative teams experimenting with Kanban begin working on physical Kanban boards, using post it notes, we started with a digital Kanban board made in Kanbanize. We believed the visual nature of the method as well as the ability to generate reports, monitor analytics and track efficiency online would help us with the continuous improvement of our process. We considered it an investment for the future as our team grew and our campaigns became more sophisticated. Like our counterparts in software development, we used terms like delivery to describe when something we deemed valuable was on its way to our target network. The difference between this approach and campaigns "seeing the light of day" was our ability to keep a very targeted eye on whom we were delivering to and how often as opposed to just "delivering at large".

The third principle of Lean is "flow", cultivating the best way for work to flow through the system. In practice, it can first be achieved through the meticulous discipline of adhering to the rules of Kanban on the board and applying essential work in progress limits to the various stages of progress. Flow means never waiting for someone to assign you work and always having a supply of work items from which you can draw.

The stricter the WIP limits, the smoother the flow of work through the system. As your process matures, you will be able to tweak these limits in order to channel work items through the stages and queues of progress when you are ready to take them on.

In our experience, the flow only became interrupted if a new team member joined the team. In cases such as these, the fourth principles of Lean, called the “pull” principles, is absolutely crucial in dictating the pace and efficiency of the flow of the process itself. At Kanbanize, flow stabilized when work was pulled from the Requested column of our board into In Progress selectively and only when the dedicated assignee could take it on fully by committing to getting it done.

Although we knew that we might never reach it, we were aiming for perfection, the fifth and final principle of the Lean methodology. The trainings our leadership team organized within the department, among team members and with invitee external coaches, were aimed at developing individual skills to the peak of ability and beyond. In the second year of our marketing operations, the CEO introduced a timely reading bonus that would help us develop an internal library with books related to the field of marketing. Taking out a book meant that a presentation about lessons learned from it later followed. Our Kanban board also helped us track new knowledge acquired by various members of the team via events, books being read, webinars attended and so on.

We later introduced a company-wide wiki that we referred to as the Kanbanize "know-how" portal. These are both great experiments that you can borrow and apply within your teams if you want to motivate more knowledge sharing and continuous improvement of the overall accumulated knowledge among the team members.

As I mentioned earlier, a lot of teams starting out with Kanban begin by mapping their process on a physical board. However, when dealing with dynamic campaigns, metrics and knowledge sharing, the choice to use a much more sophisticated digital tool with automations built-in was a no brainer. Being a very tactile person, I can get behind the idea of maintaining a physical Kanban board onsite for its presence and the opportunity to interact with it regularly. However, executing all of your work in parallel and in even greater detail on online boards has a whole range of enhanced benefits that any team can take advantage of at the very start.

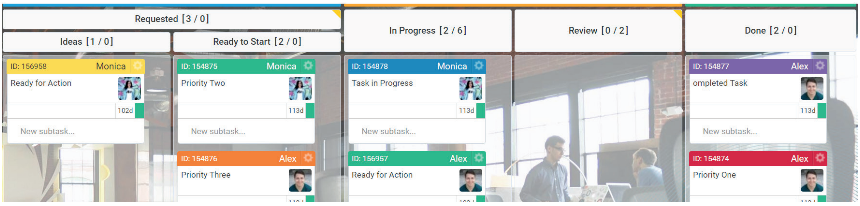
There were three (and logistically even more) very specific disadvantages to just keeping a physical Kanban board that we foresaw from the get-go:

- We were not able to collect much data from the board manually
- We noticed it was excluding remote team members who were not based on site at the company office
- We anticipated that managing the whiteboard, with papers would get crowded and might end up even more chaotic

My first exposure to working on a Kanban board was a digital one, created with the guidance of Dimitar, Kanbanize's CEO. We were hoping a digital Kanban board would mean we could:

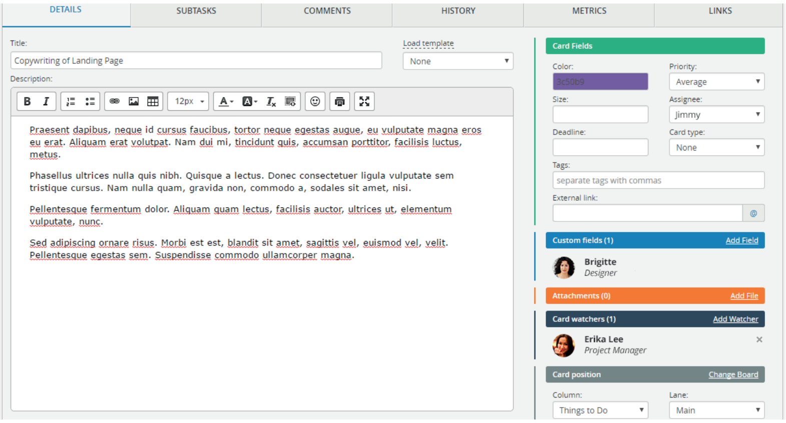
- Include our remote team members as users on the board and effectively collaborate on projects we were running together
- Have access to our boards on-the-go through Android and iOS apps
- Get detailed analytics about our process and define areas of improvement
- Generate internal reports using specific data collected over the course of the work process
- Potentially automate parts of our process so we wouldn't spend too much time writing post-its, changing status of tasks manually, blocking tasks and making recurring tasks by hand every day or every week
- To have the ability to communicate with our developers and sales teams via the online platform by linking related cards on our board with cards on their Kanban boards

Our very first digital Kanban board in 2014 looked something like this:



It had a very basic structure, so as to facilitate our first steps of applying Kanban. Our team had already grown out of the board several months in. We had hired a designer and more additions to the content team. This meant that we were able to undertake a lot more and more sophisticated marketing initiatives. However, it also exposed new problems in our process.

One of the problems that was specific to our marketing team was that we had only one designer available to us. He was the obvious bottleneck, constantly receiving work requests, sometimes only as a verbal “could you also do this…”. Our team established a pull mechanism in which Kanban cards for every task assigned to the designer were created in the Requested section of the board and prioritized based on the marketing team deadlines. From that moment on, the designer was responsible to pull work one card at a time when he had the bandwidth to take it on. When the design card was moved to the Done column, the team could add the designs to the various ongoing campaigns. A typical Kanban card on our board looked like this:



The structure of a card in Kanbanize

As we got used to working on our Kanban board, we became even more specific about the stages of our process. By the 6 month mark, our board had a lot more people working on it and a much more detailed structure from which we could collect valuable data about the way we worked:

Requested		In Progress								Done
Ideas	Ready to Start	Follow Up	In Progress	Waiting on Relative	Waiting For Review	Review in Progress	Review Complete	Tracking Others	Experiment in Progress	

IDEAS

was a glorified backlog with the top contenders for our next tasks but nothing urgent.

READY TO START

was a column reserved for tasks that directly contributed to one or more of the marketing campaigns at hand in that particular time frame.

FOLLOW UP

would keep the cards that were brought back from the Review section and needed to be refined in order to move to Done. These were often higher priority and would be addressed first thing before the others.

IN PROGRESS

would host cards that were currently being worked on.

WAITING ON RELATIVE

would keep clusters of cards that were linked to each other with a relative relationship and were waiting for one or more of their relatives to reach this stage in order to move to Done as a cluster.

WAITING FOR REVIEW

is a queue column for cards that are waiting for a review from the team lead.

REVIEW IN PROGRESS

is an activity column in which cards are actively being reviewed by the team lead.

REVIEW COMPLETE

is a queue column in which cards have been reviewed and pending implementation to be moved to the final step of their completion.

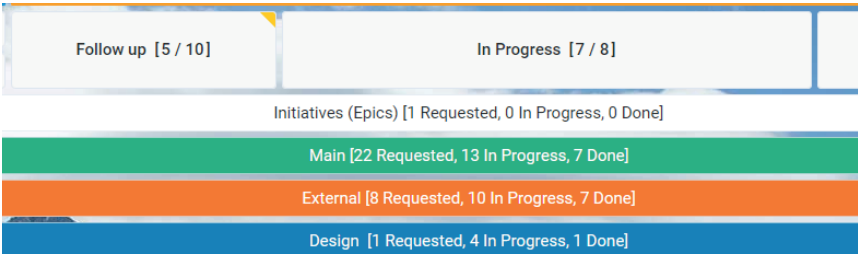
TRACKING OTHERS

would keep cards, the progress of which relies on a third party's actions.

EXPERIMENT IN PROGRESS

hosts cards that represent experiments we are actively tracking or have been running for several weeks, in order to keep them at bay in our minds and more accessible on the board. These tend to be reviewed every week or every couple of days depending on the overall duration of the activity.

Our swimlanes allowed us to separate the types of tasks we encountered.



DESIGN

Any type of ongoing design work or requests for design work lived here.

EXTERNAL

Content work on which we were collaborating with stakeholders.

MAIN

Pieces of internal proactive campaigns led by the marketing team.

INITIATIVES (EPICS)

Ongoing or planned initiatives related to Keyword clouds we had developed for Search Engine Optimization purposes.

In order to maintain a stable flow within the process, without work items cluttering up in some stages of the work progress, we imposed WIP limits. Each of our team members could have a maximum of two endeavors in progress at once. Since our initial Kanban setup, our WIP limits have become even stricter, with one task in progress per person for a single board. In the traditional marketing game, multitasking is often commended. However, we decided to try the Kanban approach and optimize for efficiency, not for juggling between tasks. It wasn't easy and we believe it won't be easy for anyone who is used to another way of working. As our team grew and our discipline evolved, we imposed stricter WIP limits that allowed only for one item in progress per team member. It changed the way we thought about our work entirely. Committing to one choice and seeing it through is difficult in any scenario and it will cause discomfort within any team.

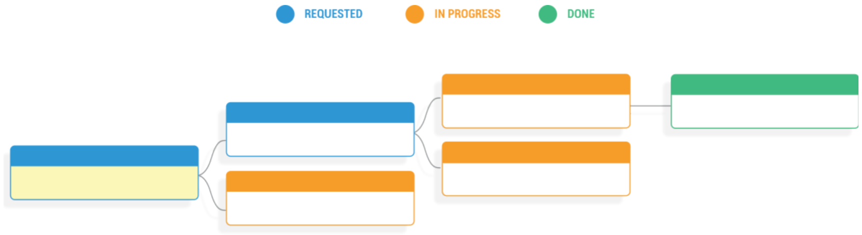
In our case, we decided that this was the best strategy for the team as a whole and the adaptation process to the new WIP limits was felt positively among the team members when they became more used to it. The result was less multitasking and, consequently, more work getting completed as opposed to abandoned. Essentially, this eliminated the inventory of half-completed articles, pending campaigns and collaborations I anticipated would accrue—as it has during any other project I've worked on. In our humble marketing powerhouse, if you started something, you had to bring it to some sort of conclusion, save for exceptional circumstances.

We implemented specific features of Kanbanize in order to structure our process into a predictable and reliable work flow of consistently valuable campaigns.

Business Rules within the system were set up in order to auto-create recurring task cards in the Requested column of our board based on need. These rules also sent email notifications to the team members if the WIP limits were exceeded. Further, another business rule would automatically archive tasks from the Done column after they had spent one month there.

The graphs and charts in analytics were our secret weapons to answering the tough questions that seemed to be pressing a lot of marketing managers in our network. Those we had heard from had shared that they had no specific data about how long projects or types of work items were taking and were not making optimal use of their possible metrics they could glean from their process. We were using the historical data collected from our workflow to define a reasonable probability of “When will the campaign prep be done?”, “How many of the tasks we just pulled from the backlog will be done by this particular date in our calendars?” and others.

Setting up card relationships in a hierarchy was another helpful mapping feature of digital Kanban boards that would have been near to impossible on a physical board—I’ve seen people show relationships using strings between post-its. For us, it was essential to be able to show the way individual task cards relate to each other and how they relate to larger portfolio parent cards, which we referred to as campaign cards. Campaign cards got tracked on a Master board that upper management and team leads could keep an eye on, while we worked on similarly sized work items connected to each larger initiative campaign card on a dedicated Marketing workflow Kanban board. Links were also used in in the Initiatives swimlane to link smaller work items to larger goals.



As a subcategory of the available card relationships, predecessor & successor is the one we used the most. It allowed us to enforce the order in which cards needed to be completed without any superfluous meetings or communications. In other words, if the defined predecessor card was not in the Done column, then the successor card could not move from the Requested to the In Progress section.

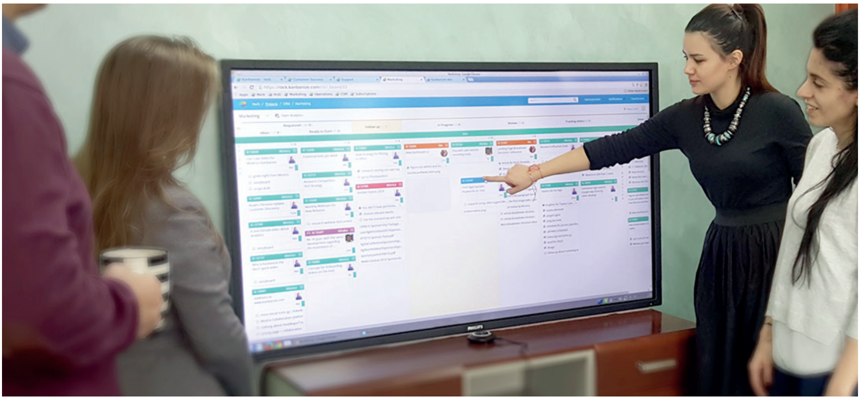
Blocking cards in Kanban means that you can add visual “alert” indicators to cards on your board that are clogging your flow. Blocks are usually added when there is an issue with a work item that is keeping it from progressing further in the stages of its process. The visual indicator shows to the other members of the team that there is a problem with which you might need assistance in order to move your task forward. Kanban encourages that team members with capacity swarm on tasks that are blocked in order to unblock them as soon as possible and keep the workflow steady.

On our main dashboard, measuring process efficiency became a way of tracking the work patterns of the team as a whole. Efficiency measured the ratio between how long our task cards spent in the queue columns, waiting for someone to allow them to continue on in the process, versus how long our cards spent in activity columns, being actively worked on by a member of the team.

We also applied some Lean & Agile best practices that could create a predictable pattern to sustain the workflow within which we were working on the digital Kanban board.

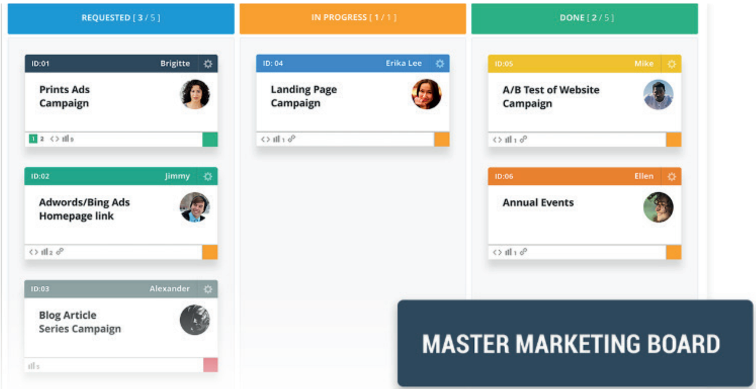
For example, we implemented the Agile practice of daily standup meetings so we could share goals, achievements and struggles on a day-to-day basis. We would meet (and continue to do so) at an odd time (10:08am) each morning. Lateness was not tolerated and we remained standing for the duration of the meeting to make sure it wouldn't drag beyond the 15 minute time limit we had set for it.

The image below is actually an excerpt of an interdepartmental stand up meeting between Sales and Marketing when we still managed to fit both teams in the same room. We split the meetings up because we no longer fit in our largest conference room and having everyone in one meeting meant it ran way too long every time.



At first, the split created some miscommunication woes, meaning that any contact with a trialling or paying customer on the side of marketing was followed by a team member's trip to the sales department to find out whether anything of note was pending or had transpired previously with that person, in terms of upsells, feature requests, and any feedback that might have been collected. We found a way to combat this by creating links between cards that were related to customers who already existed in the sales, customer support or customer success boards. Each customer represented a portfolio parent card that could contain its history as the group of its other relative cards. This allowed us to form clusters of action items about an organization or person, like a map of our relationship with them.

Follow this link if you want some tips about Running a Better Stand up Meeting with your team or simply initiating it at all within your organization. This visual infographic will make sure you start out this extremely valuable daily tradition right from the get go!



As I mentioned, we structured our promotional campaigns using portfolio cards that acted as parents to all sorts of other child cards of different Kanban boards (eg. Content Board, Design Board) all converging on a Portfolio Campaign Board. This view is synonymous with the Initiatives (Epics) swimlane.

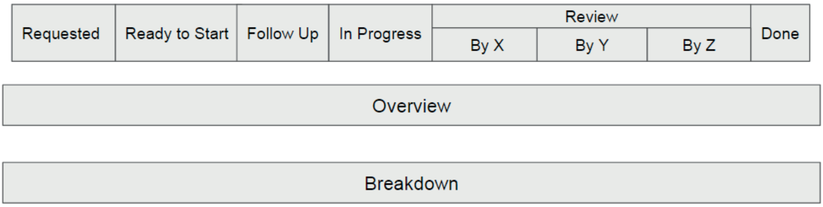
On the dedicated marketing Kanban board, work items that contributed to one specific campaign were linked with each other and the clusters were then, if required, linked to work items on external boards. For example, if we were running a paid campaign, the cluster would be linked to a card on the Purchasing board within the account in order to track costs in a place where the Accounting department could keep track of them.

We used parent, child, relative and predecessor/successor relationships in order to visualize dependencies for entire campaigns. Although we had many conceptual ideas in the backlog of the board, the team members agreed that an idea became actionable only when it was broken down into smaller, manageable work items that had their own concrete deadlines. This was our way of ensuring that huge work items did not linger in the workflow too long and would not cause our process to stagnate because they were unclear and open-ended.

Dimitar, the CEO, as well as myself, the team lead, took advantage of the Master Marketing board and the Initiatives swimlane in order to keep an eye out for aging in progress portfolio cards that acted as vessels of all other task cards related to a single project. Being able to visualize a campaign as a cluster of cards with hierarchies allowed us to get at-a-glance status updates for entire projects without switching between 3-4 different boards where ongoing activities were being hosted. The progress of the relative or child cards of the parent were acting as knowledge radiators and giving us vital information about ongoing initiatives, the status of which ended up influencing part of the strategic discussions that were going on beyond the workflow level.

> We even collaborated with freelancers we were working with on SEO initiatives using a Kanban board in our Kanbanize account.

The two freelancers had access to the board on which they would communicate, plan and break down projects and objectives so that their work did not live only in their inboxes. In a way, we introduced them to Kanban as a method and they loved it! The structure of the board we shared with them looked something like this:



In which when either Person X, Y or Z had to Review a work item in their column, an automation would send them notifications in-app as well as to their inbox. The idea was that even though these freelancers might not work with us on the Kanban board everyday, the structure of our work with them was still based on the policies we had working internally with the team. This way, even those team members not communicating directly with the freelancers, could check on the Kanban board on which all of the initiatives were planned.

The Overview swimlane, similarly to the Initiatives swimlane in the larger Marketing board, houses ongoing larger objectives while…

The Breakdown swimlane contains work items linked to cards in the overview swimlane and represents the work breakdown/ mapping of the larger aims above.

How do you aim for perfection? Measure everything.

Measuring everything we undertake became a topic of crucial importance in our team after a run of several early campaigns that we had had high hopes for, but we ended up disappointed. Failed campaigns will happen. The problem with ours was that we didn't know why they had flopped. We guessed a lot at the reasons and tried to compare with similar campaigns we had seen prosper around the web. Mostly, we felt clueless and we weren't sure what we could improve in order to fix the poor performance of our efforts.

Then, we read "You Should Test That" by Chris Goward, founder and CEO of marketing optimization agency WiderFunnel. "You should test that" is a great reminder to check our instincts against reality and reconsider what you think you know. Think you have the best offer for a campaign? Sounds fantastic. Test it. Let the data prove your hypothesis right. Everything else we had heard about 'best practice' in marketing was not working for us and definitely raising more questions than answers. The right answer, it turned out, is actually always the same —you should test that. I consider this book to be a turning point in the whole Kanbanize marketing team's journey. It represents the point at which I think we became analytical marketers and began to measure … almost everything.

> Ok, but how do you know which metrics are the right metrics to track?

Depending on the campaign, you can use any number of the metrics listed below to validate the outcome of your experiment:

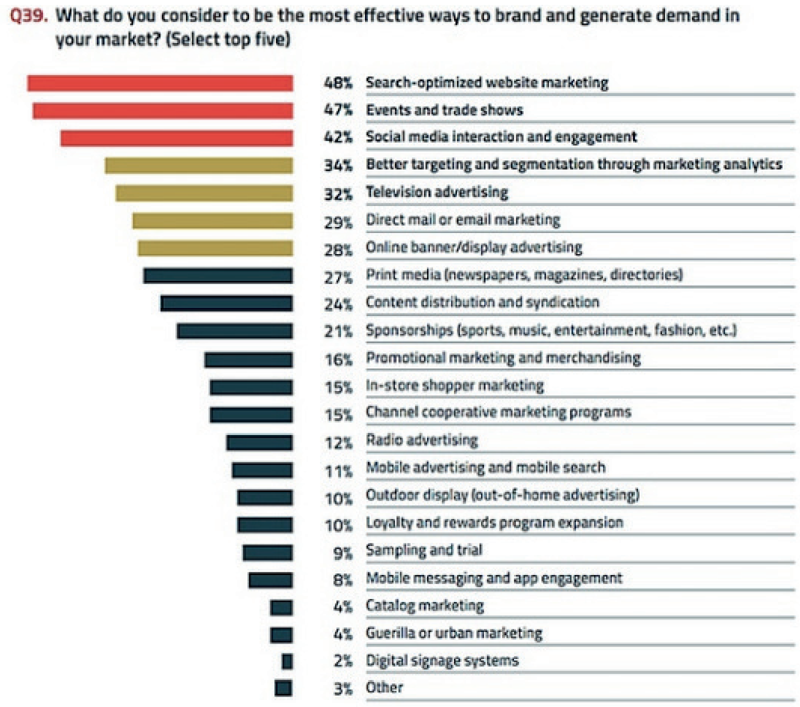
Common Content Marketing Goals and Associated Metrics

GOALS	POSSIBLE METRICS
Brand awareness	Website traffic • Page views • Video views • Document views • Downloads • Social chatter • Referral links
Engagement	Blog comments • Likes, shares, tweets, +1s, pins • Forwards • Inbound links
Lead generation	Form completions and downloads • Email subscriptions • Blog subscriptions • Conversion rate
Sales	Online sales • Offline sales • Manual reporting and anecdotes
Customer retention/loyalty	Percentage of content consumed by existing customers • Retention/renewal rates
Upsell / cross-sell	Sales for new products / services

From Content Marketing Institute's The Complete Guide to Influencer Marketing Strategies, Templates & Tools

And in the chart on the next page are just some of the possible activities marketers could be experimenting with in order to generate leads from their target market in order to help their organizations achieve growth.

Of course, it comes as no surprise that with so many simultaneous efforts and activities going on around marketers all the time and so many metrics being calculated in order to define the success of every effort, their day-to-day work is often referred to as "chaotic", by themselves and their cross-departmental team members. Yet, in the slew of so many KPIs to be measured, some of the most important ones often get neglected. Namely, process metrics. Marketers don't seem to be focusing on them enough.



Source: State of Marketing 2014, CMO Council

Process flow metrics are indicators similar to the performance indicators marketers already use for their experiments and content, however, they are geared towards measuring the ongoing performance of the internal team itself over the course of a campaign or a selected period of time. If a marketing team wants to go Lean and be flexible to change, they must adhere to the Lean principles of "flow" and monitor the way work progresses through their value stream in order to continuously improve upon their own process. Improving upon their process can actually improve their output, and therefore, their results.

Good flow metrics can mean that tasks move from Start to Done predictably and steadily as the system becomes more and more reliable to the team and to external stakeholders. In fact, we can measure the metrics of our own workflows and use these in order to triple or quadruple the results that we already measure in the end.

There are various metrics you can track in regards to the way you work as a marketer, on the individual and the team level. In the case of the Kanbanize marketing team, the analytics arsenal linked to our digital Kanban board allowed us to collect reports about our own team's efficiency as well as measure the success of our campaigns based on KPIs we were tracking within our Kanban cards. Each of the analytics for Lean marketing discussed below was carefully monitored by the team and the collected data was kept on archive with the monthly and weekly marketing reports.

For example, successful vs unsuccessful link-building outreach pursuits were measured using custom fields in our Kanban cards. We used our digital tool to generate pie graphs that could visualize our success rate on a weekly basis. We currently hold a success rate of 20% for link-building outreach efforts, which includes pitches, responding to journalist queries and writing to connect with media editors. We have been monitoring this metric and experimenting with ways of improving it.

In monitoring our block resolution time (how fast we managed to remove the issue causing a work item in progress to be put on hold), we noticed a 50% decrease of the time it used to take our team to address blocked cards and resolve them so they could move forward through the process. It meant we were dealing with blockages faster and not letting cards just idle in the flow.

To this day, the essential flow metrics we keep an eye on internally are:

- Process Efficiency—What is the ratio between the time a work item just sits there after being started and the time you/ your team spend actively working on it after starting it?
- Cycle Time—How long your tasks take to reach the done state?
- Throughput—How many work items exit your system in a given time frame?
- Work in Progress (WIP)—How many work items are considered in progress at a given or past time or time frame?

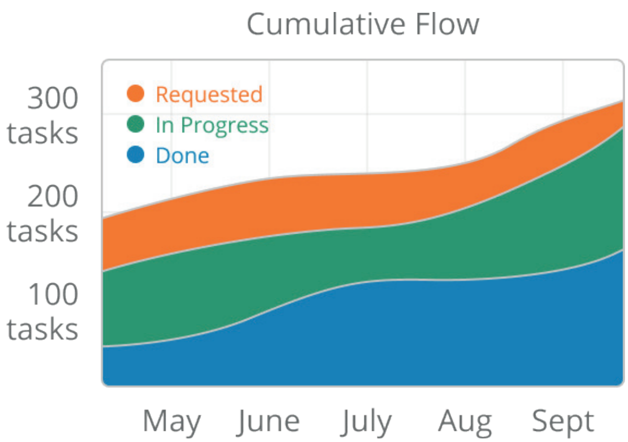
By monitoring these indicators and aiming to improve them with each passing quarter, our team managed to improve our own delivery patterns as well as the quality and speed of our work.

Here are the tools we used to monitor these indicators. Technically, you can generate these charts manually, if you are working with data collected from a physical board. However, as we were working with a digital one, these metrics were collected automatically and visualized using the following super handy diagram structures.

You can monitor how stable your process flow is by measuring arrivals and departures of work items to your Kanban board.

The Cumulative Flow Diagram (or affectionately referred to as the CFD) offers a concise, coherent visualization of the three metrics of flow—cycle time (how long you spend actively working on a task or tasks), throughput (how many tasks were finished at a given point in time or time frame), and WIP (how many tasks are being worked on at a given point in time or time frame). The cumulative flow diagram can synthesize massive amounts of information and present them in a view that anyone can navigate at just a glance. Visualizing your team's flow this way provides you with both quantitative and qualitative insight into past and existing problems.

The main purpose of the cumulative flow diagram is to show you the stability of your workflow over time and assist you in keeping your team on the right track towards process perfection as you accumulate completed tasks in a healthy way.



A simplified CFD that shows the three main sections of a Kanban board as bands growing upwards, accumulating finished work in the blue Done band of the chart.

The **x-axis** is the time frame for which you're tracking.

The **y-axis** accumulates the number of work items that are in the system and its distinct bands at a given time, in the Requested, In Progress and Done sections of your Kanban board, unless otherwise specified.

What to aim for when monitoring your CFD

The band that represents the work in progress (it's green in the image above) grows in parallel to the Done band. This means that there is a steady flow of new work being started and a steady flow of work getting completed.

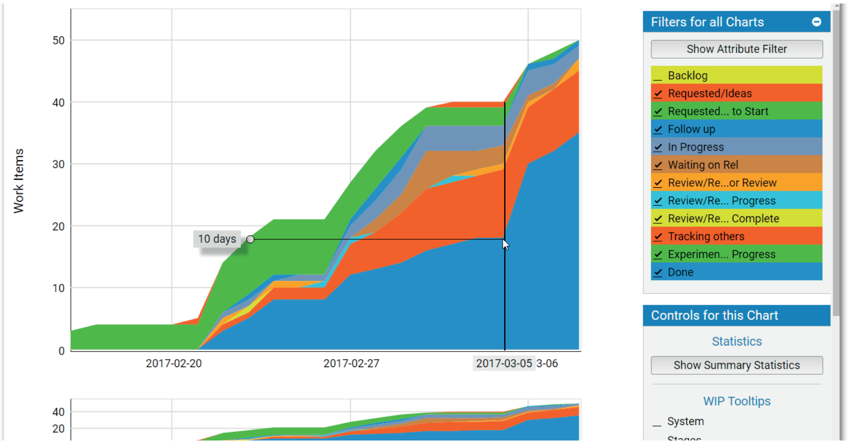
What *not* to aim for when monitoring your CFD

In Progress band of the CFD is not growing in parallel to the Done band. This means that your work in progress is more than it should be or sporadically changes—some weeks you have tons of work in progress, other weeks you have no work in progress.

Backlog band getting huge means you are accumulating an inventory of ideas that are not being prioritized—that people in the community call backlog grooming and it is done by project managers or team leads.

Done band of the CFD is not growing. In other words, no finished work is leaving the system. Bad news for any customer waiting to receive any value on the other end, but actually bad news for you and your team because you are not delivering ready work to anyone.

In Kanbanize, the CFD monitoring the marketing team's process stability looks something like this for a two-week period in the spring of 2017:



Although this segment looks a bit erratic, in its full, wide format, the CFD should look gradual as it grows over time.

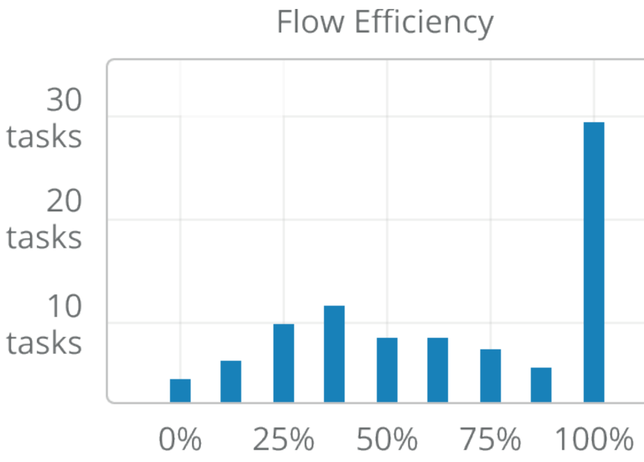
If you label the columns on your Kanban board, you can measure how efficient your team is

From the perspective of a Lean marketing manager, efficiency is a hot term that needs to be kept at bay. Is the team working efficiently and making the most of their time resource? The flow efficiency of a process can be calculated as the ratio between the total value-adding time and the total lead time required to complete the work items that flowed through it. In theory, the following data is tracked and then plugged into a formula:

- Value adding time is the time frame in which your team or equipment actively works on a task
- Lead time is the entire time that is required for an assignment to be completed
- The difference between the two can be referred to as waste and should be minimized

A Kanban board really helps you measure these two times, so you can figure out the ratio between them. By labelling the columns of your Kanban board, representing phases of your process, as value adding columns (where work is being worked on the whole time it's there) or queue columns (where work waits), you can track the sum of all the time it spends there. A digital system will also add wait time to a work item when it has been blocked in the flow. Like timers for your work items! One for active time, one for waiting time.

Simple enough? Furthermore, applying the principles of the Kanban method can actually help bring Lead time and Value-adding time closer together by motivating constructive behaviour in the team and making them aware of tasks that are spending a lot of time blocked or waiting on someone to take action. Getting a visual on how long their work spends loitering can encourage the team to fight to bring their efficiency percentage up as a collective effort.



A simplified flow efficiency chart that shows a distribution of how many tasks fit into the categories of efficiency percentages outlined in the x-axis.

The **x-axis** represents percentages of efficiency that certain tasks in the system might have achieved up until a certain point—a ratio of their individual cycle time/ individual time spend in queues.

The **y-axis** represents the frequency of tasks in the system that fit the description of having the specific efficiency percentage.

In the graphic above, it looks like most tasks in the system at this point in time have an efficiency of 100%—with almost 30 tasks fitting into this category.

What to to aim for when monitoring your flow efficiency chart:

If the probability distribution is in favour of the right side of the x-axis and most tasks in the system have an efficiency rate of over 50% it means that they are spending more than half of their total lead time in activity columns. They are getting worked on more than they are waiting. Although you can improve this rate even further, 50% is a good efficiency to aim for, especially when you first start out measuring this metrics.

What *not* to aim for on your flow efficiency chart:

If the probability distribution is in favour of the left side of the x-axis and most tasks have an efficiency of 40% and below, you should aim to reduce the time your tasks spend in queue columns.

If all of your tasks have a 100% efficiency rate, which is nearly impossible, it means you haven't labelled any queue columns in your process. You probably have them in your process without even knowing it. Don't be afraid to admit to some queues in your process, they can actually help you be more effective in the long-run. For example, a Waiting for Review column is a queue that collects work items that need to be reviewed by a team lead or manager before moving forward in the process. More often than not, work items will wait there for some time until they get some attention from the reviewers and this will make the bottleneck very clear so you can improve upon it.

> You can make project forecasts based on the data your Kanban board collects

You can even make predictions about how many items your team will complete in the future using historical data collected from your Kanban board. You can use a technique used to understand the impact of risk and uncertainty in financial, project management, or cost-related activities. I don't think it's as popular in marketing as it should be so…have you heard of Monte Carlo simulations?

Whenever any statistician says Monte Carlo Simulation, someone out there in the world goes "Seriously?" Many have been thrown off by the name of this method of defining the probability of something taking place in the future. It's only quirky because it was named after Europe's elite gambling destination. Otherwise, it's a completely legitimate and recommended way of forecasting the future of your team projects.

Fun fact about Monte Carlo? Local citizens are not allowed to gamble or even step foot in their own casinos.

Fun fact about Monte Carlo *Simulations*? The Monte Carlo simulation is a mathematical technique that helps you account for risk when you are making decisions using groups of numbers.

It relies on a large number of random simulations based on historical data to project the probable outcome of future projects under similar circumstances.

From the project manager's perspective, Monte Carlo can take the throughput data of their team's workflow for a past time frame (January 4th–February 4th) of their choice and predict the probable throughput data for the same team for a future time frame (e.g. February 4th–March 4th). In other words—how many work items they will complete or how long it will take them.

For any day in the future for which you want to project results, the Monte Carlo algorithm will use the characteristics of a random workday in the past time frame to run several options of how many work items the team is likely to get done on a given day within a future time frame.

Of course, it cannot account for extraneous circumstances, but it doesn't pretend to either. By running 10k or more trials, the Monte Carlo expresses results in a probability distribution, not a certainty. Probability distributions are a much more realistic way of describing uncertainty in variables of a risk analysis. They give you a clear, visual distribution of the likelihoods of things actually taking place while you get to make decisions together with your team and your stakeholders. Now, that's a game changer! It means deadlines in marketing teams can actually be based on probability as opposed to wishful thinking.

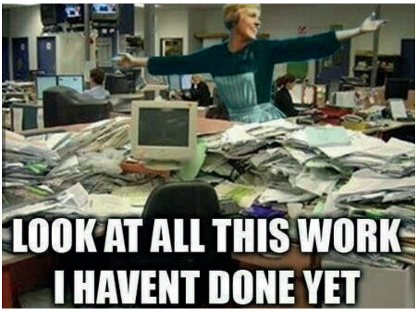
When can you use the Monte Carlo Simulations?

- When you want to anticipate how many tasks your team can finish in X amount of time
- When someone gives you a specific date and you have to predict how many work items your team will have processed by that time
- When you want to set realistic deadlines (based on historical data from your team) for upcoming projects and initiatives

What happens a lot of the time when you don't use Monte Carlo Simulations for forecasting is the equivalent to trying to get a basketball through a hoop while blindfolded. If you've ever met me, you know that I like explaining situations in business and project management with *memes*. So here goes.

Here's the scenario in which you can totally win by using Monte Carlo. Your marketing team has a client. You've set the parameters of a campaign for a new product that the client is developing and now you have to set the deadline for its completion. Your customer is majorly excited about this new initiative and wants to get it out into the world as soon as possible. This also means that, whatever campaign you are planning, chances are, the client wants it done 'yesterday' so they will ask you how soon you can get it done. The worst thing you can do is give them an optimistic estimate off the top of your head. More often than not, your clients will make the deadlines and only consult you at the end of their estimation process of what suits their business needs. You should know the nitty gritty of your work process as well as the details of the project you are about to undertake so you can formulate future deadlines based on historical data about the way your team works now.

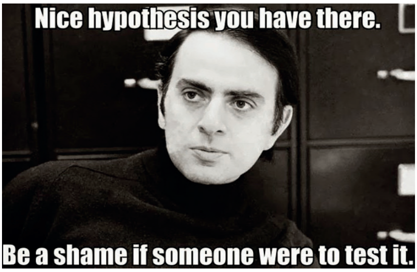
When it comes to the mention of deadlines, this is your team when the organization acquires a new client.



If you give them 'guesstimations' based on your wishful thinking and honest desire to bring their business value and satisfaction, this will probably end up being you on the day before the deadline.

On the day of the deadline, your customer will look like this.

And…you're stuck! You'll have to extend the deadline or, worse, lose the client all because of the planning fallacy that took place at the very beginning.



So, the next time your client sets a strict deadline for your team's next initiative, let this be you.

Then test it using 10k trials of a Monte Carlo simulation that has been collecting historical data about the workflow of your team since you began working on your Kanban board.

With a probability distribution in hand, you will have a tried and tested statistical equation to back up your proposal for a realistic deadline that is as risky as you and your customer decide you can live with. Monte Carlo Simulations are expectation management at their best!

What seems to be most important is that, in tracking these metrics in general, the Lean principle of continuous improvement becomes entrenched in the way we decide what we will work on, how we will approach it and how we will measure it. Using the CFD gave our team a sense of the tasks we were accumulating and the trends we could expect in our process down the line. The Flow efficiency chart showed us where our work items were wasting time waiting in queues. I admit that Monte Carlo simulations are a recent exercise in forecasting for our team because we learned more about it later than the two other charts. So far, our process of planning has been closer to "guesstimation" rather than statistical probability, but we're excited to follow our own advice and "test that".

Overall, within 3 months of using our online Kanban board, we noticed the following results:

- No more "he said, she said" just data right on the board, accessible from anywhere with an Internet connection. It minimized the need for constant reporting and prevented information loss.
- Remote team members became more included in the work process and, consequently, took on more initiative and responsibility.
- Encouraged knowledge-sharing and the tracking of information in a communal database (the board itself) for the sake of continuous improvement.
- The team began to base more of their suggestions on what would bring value to our customers and identify new ones rather than any other just "cool" ideas.

Within 6 months of using our online Kanban board, we witnessed the team transform the way we approached our process in terms of the positive habits we managed to entrench in our routines:

- Queues in the process were identified and labelled
- WIP limits became stricter and the blocking of cards as a policy was more widely adhered to.
- Team began to focus on improving the metrics of their own process in addition to campaign KPIs. Metrics such as card cycle time and overall efficiency of processes became important to the team.
- With a clear process for testing, research and education —the team became more eager to test something before jumping into things haphazardly.
- Automation got rid of a lot of the manual aspects of managing recurring tasks, WIP limits and assigning recurring tasks.
- The board provided more visibility for external teams and contributors to know exactly what the team is prioritizing at a given point in time.

We had developed a more predictable and stable flow in the way we dealt with requested tasks and entire campaign breakdown. We became one of the most consistent teams in the company.

Over the course of the development of our Lean Kanban marketing team up until this point, our team's efficiency has increased threefold, Kanbanize as a tool has transformed into a feature-rich platform, our organization has tripled in size and we have begun to expand to new markets. Needless to say, we believe in the power of Lean and recommend a Lean Kanban implementation to any marketing team out there.

So, we started sharing our results with the community...

With these results in hand, I became more adamantly vocal about the implications of applying Kanban to Marketing. The first time I expressed my ideas about the role of Lean and Kanban in Marketing was in the fall of 2016 on Scott Brinker's excellent website chiefmartec.com by exploring some key takeaways from the case study of the inbound marketing team at Kanbanize, as I have with you. Kanban had worked extremely well for our team and I wanted to find out if it had worked for others in order to validate the approach itself as it pertained to Marketing. Since then, I have identified so many reasons why Kanban for marketing teams rocks! In the beginning, I had these five basic marketing problems in mind and I thought that Kanban, as I practiced it with our inbound marketing team at Kanbanize, solved them quite well.

Kanban's solutions to your marketing problems

MARKETING PROBLEM

Marketing never stops.

Unless the agency gets fired or a product gets retired, marketing will keep rolling out new campaigns. Marketing of a product or service is continuous, experimental and builds upon itself, which means that there will always be expectations for a new conceptual approach or strategy that can move the organization to the next level.

KANBAN SOLUTION

Building a process flow.

Like Marketing itself, Kanban is flow-based, continuous and encourages practitioners to build upon their implementation of it. Building a flow around work items makes a marketing team more dependable and reliable while at the same time complementing the natural course of the marketing process.

MARKETING PROBLEM

Most marketing teams have problems with deadlines and planning ahead.

Forecasts in marketing tend to be based on customer demands or wishful thinking. This ends up causing a lot of missed targets, swelling budgets and deadlines that pass long before the initiative is actually finished. Crafting the annual Marketing plan is often described as a "charade" because it hardly ever stands the test of time and always gets changed a couple of months in.

KANBAN SOLUTION

Using historical data to adjust expectations accordingly.

Kanban deals in Takt time, not iterations. What does this mean? It means that it values a commitment to one's role and the quality of one's work rather than deadlines. Based on the historical data accumulated from a team's working Kanban board, probabilities about reasonable due dates that can be agreed upon with stakeholders can be put forth. These due dates can serve as guidelines for the team to follow in order to ensure that they are moving forward at a steady pace.

MARKETING PROBLEM

Marketing teams mostly place an emphasis on the desired results, not the process.

In other words, marketers measure results-oriented metrics such as engagement and number of people who decided to try a product post campaign, but do not keep track of whether they are improving their own process internally over the course of a campaign. It is these process metrics that have the potential to triple or even quadruple the results measured in the results post-op phase.

KANBAN SOLUTION

Defining a team’s progress and measuring improvement.

Mapping our work items on visual boards allows us to break down larger initiatives into smaller, similarly sized tasks that begin to flow through a distinct structure. This allows us to measure improvement. Also, by urging Marketing teams to define explicit policies when it comes to how these similarly sized tasks flow through the set process, Kanban manages to get us thinking about the way we work and how we can make the most of what we do for even better results. In a way, it puts us in a position to think one step ahead in the name of reaching even greater heights.

MARKETING PROBLEM

Marketers multitask like it’s nobody’s business.

Marketers switch between tasks and contexts a lot because their departments are usually working on more than one project at a time and everyone wants to contribute in some way. The result is a whole lot of waste in the process. We’ve all been there.

KANBAN SOLUTION

Using Work in Progress Limits.

The essential work in progress (WIP) limits applied on an individual or system level help teams prevent multitasking and finish the work they start. Additionally, having rules about how many work items are in progress at once can also prevent overburdening of the team and the team members, which is quite typical in creative environments.

MARKETING PROBLEM

Creative teams have problems with communication, among themselves and with others.

Communication is a big part of marketing, in fact, some argue that marketing is communication. So why do marketers spend so much time in meetings and, at the same time, feel misunderstood by other departments within their organizations? Marketing teams tend to generate many ideas and the fleshing out of these ideas takes time and effort, especially when we are always aiming to be unique. What is discussed in a marketing meeting often concerns many aspects of a product or service's public image. That's why these creative sessions might drag on longer than expected and create a time suck for the team's resources.

KANBAN SOLUTION

Improving visibility by mapping your workflow.

The visual nature of the Kanban board means that it acts as a radiator of information for the Marketing team as well as other teams that have access to the board. A Kanban board can indicate when the progress of a task is blocked, who is responsible for the task, how long the task has spent being worked on, what stage it is in, its dependencies and much more… at a glance. By updating a Kanban board regularly, a Marketing team actually invests in the visibility and the transparency of their own work process. Hosting quick and efficient daily standup meetings can help marketing teams focus on what is most important and weed out "cool" ideas that don't seem actionable or measurable. When they do decide to pursue a project, mapping it on an accessible Kanban board can eliminate some of the friction between Marketing and other departments, such as Product and Sales, when it comes to knowing what they are currently working on.

Listening to the community's feedback

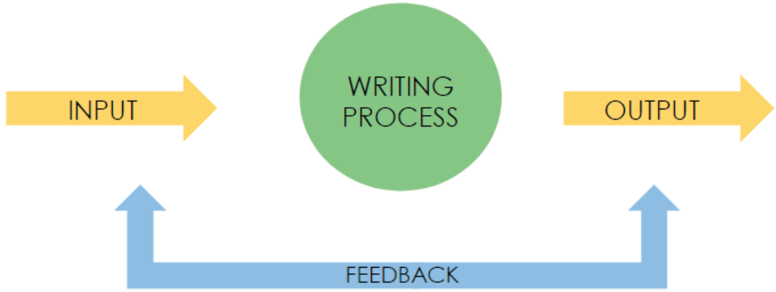
When our team decided to chronicle everything we had learned so far in this eBook, we not only mapped it on a Kanban board, but also followed up with the feedback loops that made this project a true exercise in transnational Lean writing. Over the course of the writing process, I had the amazing opportunity to be invited to speak at two events in the UK and Ukraine, respectively. At these events, I promoted a call to action that would help create a healthy feedback loop between my potential readers and my process itself even before the official publication of my book. At the end of my lecture, I gave out my contact information to all in attendance and encouraged anyone who found my talk interesting to reach out in order to receive the first two chapters of the Lean and Agile Marketing with Kanban eBook I was currently working on as a teaser on which they could give feedback. This allowed my future readers to actually have input on the way the book was developing while it was still in production.

The first event at which I spoke was BrightonSEO, a conference that has come a long way since being held in a room above a pub. It now attracts global authorities on SEO and Content Marketing as well as thousands of people who work in this field so they can share experience, innovations and new trends about Marketing amongst each other and improve collaboratively. As part of the Business track of BrightonSEO in 2017, I spoke on the topic of Lean and Agile Marketing with Kanban in front of an audience of about 100 people, most of them mainly coming from marketing agencies in the UK. The people I spoke with at the event and then later via email (those who answered my call to action) had definitely felt the pains of a chaotic workflow with no structure or discipline. I was happily surprised to hear that what I had to say made sense to this crowd. Furthermore, they began finding more and more ways they could apply Kanban that I had not even thought of yet. One of the examples that excited me the most was the one an audience member shared later via email—print journalism! “Your talk made me realise that production teams in print journalism essentially use Kanban without even realising. Because deadlines are so tight, we moved Indesign and printed pages through a series of folders until they were ready for press so that we knew exactly what state they were in.” Wow!

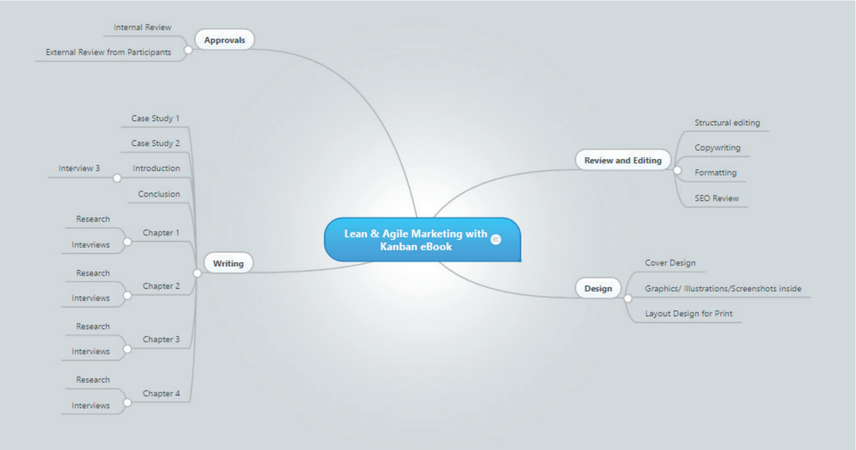
The only surviving footage of my participation in this event. Thanks @C_Catalina!

A delayed flight and missed connection actually prevented me from attending Agile Eastern Europe, the event in the Ukraine at which I was meant to speak about Lean Marketing once again, in person. However, a two-way live stream to the Kiev Ballroom allowed me to still carry out the lecture as well as receive feedback on the first chapters of my book. Thanks technology! Next year I'll attend all the events as a hologram of myself...just kidding...

Using the comments received from the members of both audiences that contributed to the improvement of the content of this project, I successfully created a feedback loop that allowed me to test a viable piece of the whole text on a segment of the relevant readership.



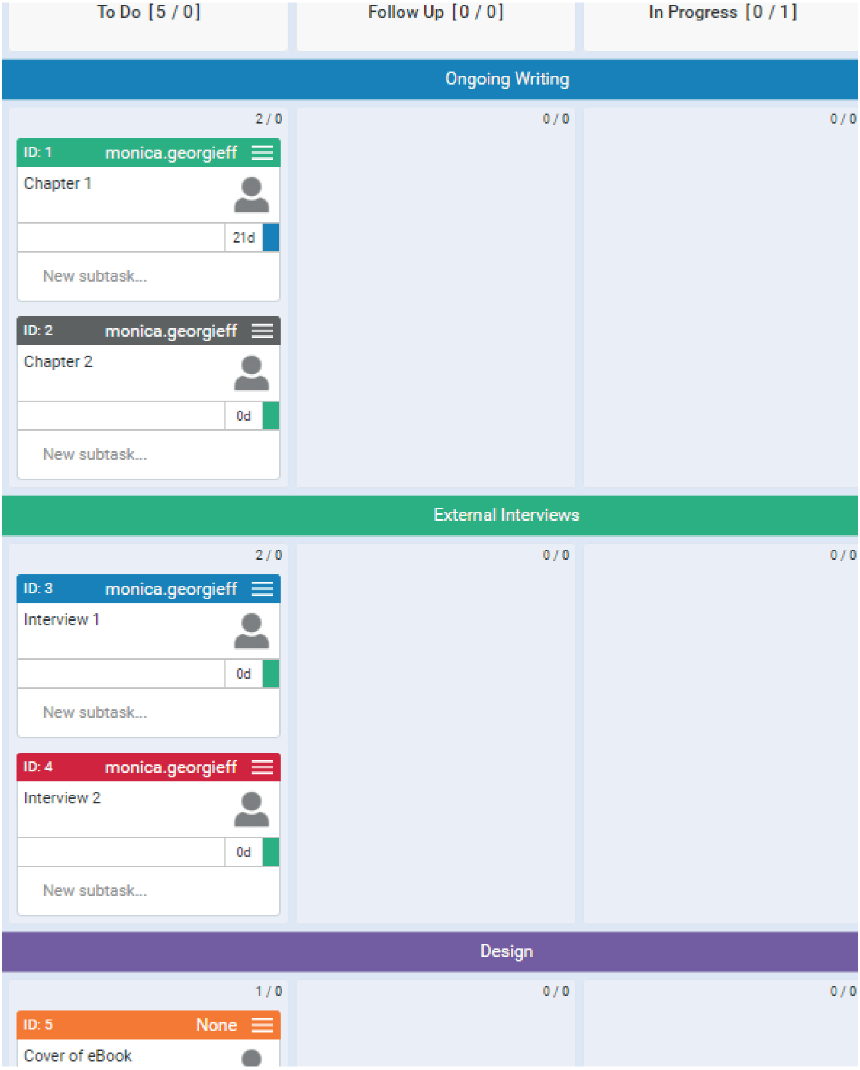
In order to show you that you can really break down any project on a Kanban board to immediately make it more accessible to remote team members, more actionable for yourself as an assignee and more visual in the context of its execution—here is a breakdown of how I approached the writing of this eBook.



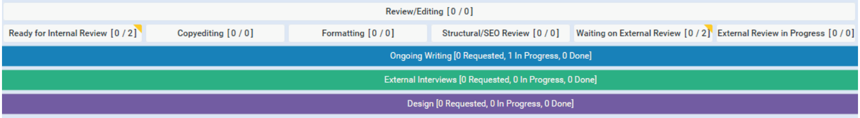
This is a project breakdown that I made in MindMeister in order to quickly illustrate the various work items associated with putting together the eBook. However, here, there is no workflow, priority, indication of the order of events that needs to occur, measurement of any kind, and reference about who is responsible for what.

Now, check out this breakdown mapped on a Kanban board with a specific workflow in place and in mind. I broke it down into pieces so that it could be easier to see and decipher the various stages through which the modular work items from the larger project (the eBook as an initiative unto itself) will pass in order to be added to the final result—the book!

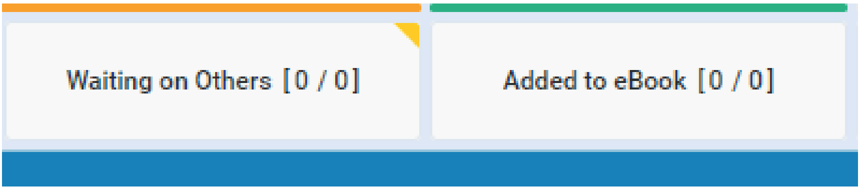
The Requested Column will be populated by the To Do Chapters, Interviews Yet to be Carried Out and Designs necessary for the completion of the project, as planned above. The In Progress section will keep work items that are currently being executed as well as a Follow Up column for additional changes that might come up during internal or external review:



The Review process, as described above:



Waiting on Others is reserved for situations in which I wait for a reply from the interviewees I have invited to participate or in other situations when my work is pending on a third party. Done, in my case, is when a part of the book has gone through all stages of review and has ended up Added to the eBook:



What's great is that, on an online Kanban board, you can collaborate with other people working on the same project as you, no matter where they are in the world.

We called the most recent step forward in our own continuous improvement Flow-e.

If your marketing team operates even remotely close to the way ours does, then you will understand the problem we had left untackled. We had Kanbanized most of the parts of our process and really started to approach our tasks with Lean thinking and principles in mind. So, naturally, processes that had seemed fine before, now seemed inefficient, when observed through the lens of this newly acquired mindset. We could no longer ignore the waste generated by a process so quotidian, so familiar, that we were surprised it had not occurred to us before.

> We could no longer ignore…that process was email.

There had come a point at which some members of the marketing team were getting a new email to their inbox every 8 minutes of any average workday. Most of which contained an action item that we then transferred to a Kanbanize board where we could actually process it effectively with the help of other team members. With the leadership of our CEO, Dimitar, we developed an idea.

Why couldn't we have Kanban email? With a flow, a Kanban board, columns and everything all in our inboxes? Most of the emails we get contain an action item that can be ignored or completed, but in all cases, the email had to be processed by someone, you or a colleague. You rarely know what an email contains before you open it, browse through its contents and decide whether to act on it urgently, act on it later or move it right into the trash.

Think of your inbox like a backlog that requires grooming or a task that requires processing. Each email received requires your consideration, to an extent. You might delete emails that are just passing ideas or offers in which you might not be interested. However, the emails that contain todos become important and require a workflow if they are to be processed as efficiently as possible while also tracked for the record. Otherwise, important information gets lost.

In an article from March 2014, the Harvard Business Review, tackles this issue by asking the almost rhetorical (at least from what I've seen) question—"Do you leave emails in your inbox so that you remember to read or tackle them?" A lot of us do this, but this habit represents a fundamental problem in the way we deal with the loads of information that we filter through our email clients. The HBR article agrees, "...If so, you're using your email to manage your tasks—and those are actually two very different things. Using a separate task manager, one that ties in closely with your email, can help you spend less time sifting through your inbox, and more time getting your most important work done."

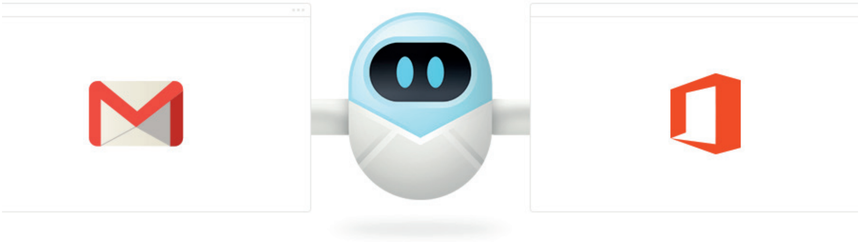
> Why do we tag these two activities onto each other if our email clients don't support this by themselves?

"The reason so many of us fall into the trap of conflating email and task management is that email is inextricable from much of what we do in work and in life: many of our tasks arrive in the form of email messages, and many other tasks require reading or sending emails as part of getting that work done."

That's why we thought up Flow-e. We affectionately named

Flow-e after Pixar's Wall-e, who was also created to deal with waste, but of a very different kind.

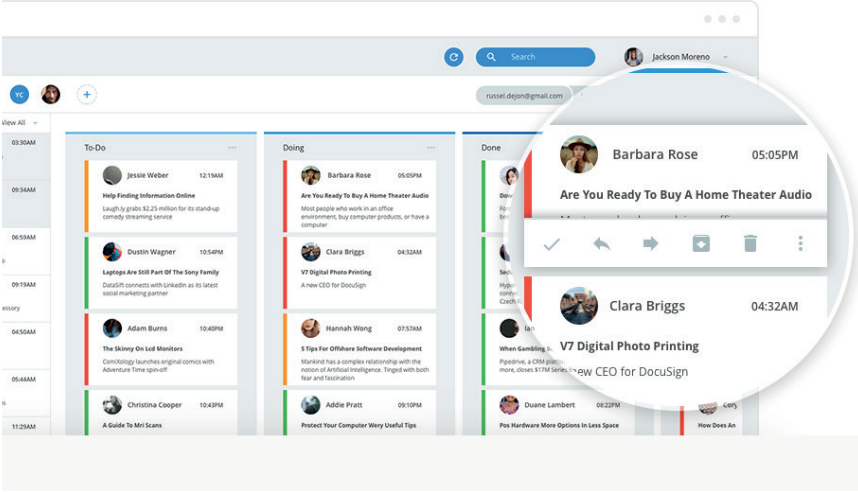
We created Flow-e so we could have a way of turning our boring Outlook inbox into a visual task board with a workflow of its own. That way, we can follow our natural inclination to act on the work items that arrive from this channel, but also be smart and efficient in the way that we process them. Hooking Flow-e to your Gmail or Outlook means that the system will update automatically when you receive new mail so you can now check incoming messages there too. The Kanban interface allows you to customize a workflow with stages when it comes to processing these incoming requests. You drag and drop new mail as it goes through the phases of progress that are now part of your inbox workflow.



Flow-e at birth, circa 2017

What Flow-e wants most is for you to never forget an action item from an email again and to go through emails more quickly, efficiently and thoroughly than before. She aims to prevent waste by optimizing the way you process your messages on a daily basis. By tackling your email using the Kanban method and its principles, you can actually build your inbox into an even more reliable and actionable communication channel. Nothing will slip past you.

This is what Flow-e looks like on the inside. Those are all your e-mails on the left and the Kanban workflow therein on the right.



From everything you've learned about Kanban in this eBook, you probably recognize the distinct To Do, In Progress and Done stages of a visual Kanban board tagged onto a Backlog of your own incoming mail, queuing to be processed. If you're just starting out, processing email in this way can get you speaking Kanban more fluently. If you're a Kanban master, try adding Kanban to the way you process your email communication and let us know if Flow-e helped.

Other things you can do in Flow-e:

- Add todos to your emails
- Set up meetings that come out of your email communication
- Create timelines
- Set deadlines to your emails when you need time to work on your response
- Keep your data (Flow-e just reads your inbox and visualizes it, we don't store anything on our servers)
- Delegate tasks to team members

As marketers, we represent the gateway between the external world of customers who love and use our products and our internal departments like Sales and Product, with whom we also communicate every single day. Arguably, marketers have the most communication channels to deal with because we are on the crossroads between our customers and the teams we collaborate with inside our organizations.

Turning our inboxes into a workflow that we can improve, adapt and depend on can help us continuously optimize the communication in our entire organizations. Further, we can use this as a base to build upon the processes we maintain on an even larger scale.

Our team has been testing Flow-e internally for the past couple of months and we love it! Soon, we will be ready for a wider release so everyone can have a Lean way to tackle their inbox and never ever forget tasks and meetings that get committed there.

CHAPTER THREE

A Brief History of Lean and Kanban

So, how did Kanban, a manufacturing method developed in Japan in the 1950s, become popular in IT in the 2000s? What we are seeing in the new millennium is quite a shift from the physical request board with sticky notes for car parts in a factory, in other words, Toyota's kanban.

How Kanban looked when it was developed at Toyota.

In the late 1940s, General Motors ruled the automotive game in the United States and beyond from their headquarters in Michigan. At the time, the Toyota Motor Corporation based in Aichi, Japan, was a relatively unknown foreign car maker that could best be described as the underdog of the industry. In efforts to improve the efficiency of their production process, Taiichi Ohno, a Japanese industrial engineer and executive at Toyota, developed the Toyota Production System, which later became known as Lean Manufacturing. By observing the way a supermarket operates, only ordering in stock when needed as opposed to keeping inventory, Ohno encouraged the Toyota company to adopt a Just-in-Time pull mechanism to their factory operations. From now on, they would only build a car when the car was requested by a customer. In other words, they wouldn't push out useless inventory by guessing at the potential demand, but instead, pull existing requests for their vehicles and focus on building the requested car as quickly and as high-quality as possible. He posited that if they managed to do it right, they would waste less resources, work faster, cut back on their costs and, eventually, beat the notoriously wasteful American car companies that were dominating their market.

He began promoting his method by introducing the types of waste in their process that they would need to avoid and or totally eliminate.

These "Seven Wastes", as he called them, came down to:

1. Delay, waiting or time spent in a queue with no value being added
2. Producing more than you need
3. Overprocessing or undertaking non-value added activity
4. Transportation

5. Unnecessary movement or motion
6. Inventory
7. Reduction of Defects

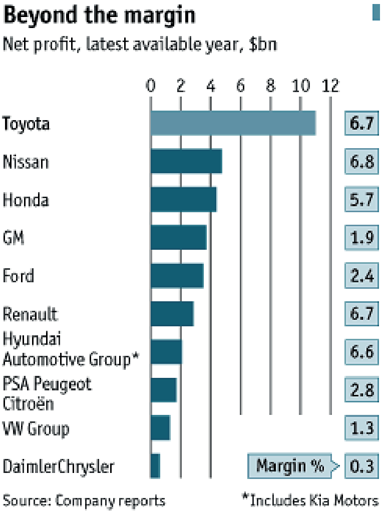
In theory, the identification of these sources of waste was a healthy exercise in critical thinking. However, in practice, how would the teams at Toyota prevent these common wastes on a daily basis in the factories? Taiichi Ohno had an idea about how to make that happen as well.

He introduced the principles of a hands-on method that would structure their process workflow in such a way that it would make their process less wasteful. He referred to it as 'kanban' (literally meaning signboard or billboard in Japanese), which referred to a scheduling system for the just-in-time manufacturing he describes that would use visual queues to control the factory supply chain.

This meant that large boards that could be accessed by anyone in the factory were brought in and set up to show the various stages of progress of various initiatives in the company, whether they be the building of a car, the introduction of a new process or the design and development of a new model.

One of the first applications of what Toyota referred to as, kanban, for the first time in history.

Today, Toyota is the top grossing car manufacturer in the world. Here are the statistics from their net profit in 2005, when they officially solidified their position at the top of their industry on a global scale.



The Economist that year issued a report (from which the chart above comes) in which Toyota was highly praised, "here is the world car industry, and then there is Toyota. Since 2000, the output of the global industry has risen by about 3m vehicles to some 60m: of that increase, half came from Toyota alone. While most attention over the past four years has focused on a spectacular turnaround at Nissan, Toyota has undergone a dramatic growth spurt all around the world. Japan's industry leader will soon be making more cars abroad than at home. It has overtaken Ford in global production terms and is set to pass Chrysler in sales to become one of America's Big Three."

The company itself credits kanban as a key player in its success. Consequently, if a car manufacturer can make such an amazingly transformative turnaround from underdog to dominant car maker in the world, what can be said for other industries that are seeking the same effect?

Enter the first Kanban for Knowledge Work team.

Right around the time that statistic about Toyota came out in the Economist, one of the first IT teams at a US company called Corbis, owned by Bill Gates, decided to experiment with the method in their development department.

In a blog post from February 2015, called "The Secret History of Kanban", Darren Davis, the Development Manager at Corbis at the time of the experimental Kanban implementation, refers to the company as "a media licensing company…with an uncanny ability to lose money." Sounds dire, indeed.

At the time, David Anderson, one of the current leaders in using the Kanban method in knowledge work, stepped on as the Senior Director of Software Engineering at Corbis. He had previously noted, during his work in IT, that software developers and engineers saw many of their pain points addressed in the best practices that efficient manufacturing producers were using to stay on top of their game. Influenced by the managerial writings of Eliyahu Goldratt and Donald Reinertsen, Anderson's goal became to put structure back into the software maintenance process and the first milestone on the path of its achievement was the application of a Kanban system within the team.

What kinds of problems was the IT team at Corbis dealing with? Why did kanban, an approach popular mainly in the manufacturing field, make sense to pursue to fix their troubles?

According to Darren Davis, what was most problematic was:

- An unpredictable, inefficient process (The sustainment engineering effort was in shambles)
- Wasted time/poor time management (Long meetings that were aiming to be quick and tight, but dragged on due to many issues)

David Anderson introduced several concepts to the team that could help with the way they considered their process and its improvement:

- Rely on historical data for probabilistic means of determining when your project is likely to be done
- Think of software as inventory that could go stale, don't let it build up without being released

In Anderson's post about the history of Kanban in Knowledge

Work and his time at Corbis, he recalls the initiation of the visual Kanban board in January 2007 to illustrate the flow of work through the value stream, "Darren Davis suggests that after a series of successful releases from the maintenance process improvements seem to be stagnating and there appears to be so much variation in flow that no one can understand what to do next. He suggests that we should visualize the workflow using a card wall implemented on a white board across the hallway from his cubicle. The idea came from one of his team members. So a board goes up on the wall."

A slightly more modern take on the huge Kanban ledges that we saw in the Toyota factory, we see a more compact, modern Kanban board that uses a whiteboard, dry erase markers and post-its in order to format the visual signs and cues necessary to move the process along. The Corbis team's first physical Kanban board looked like this:

In the image above, the different colour post-its represent different types of work that are mapped on the board, a legend differentiates the types of work in the bottom, left corner. The completed work is on the far right, outside the board, serving as the team archive. In his talk at the LeanAgileUS conference in Ft. Lauderdale (February 2017), Darren Davis recalls that this cluster outside the board began to spread around the board on the wall and onto the ceiling while promoting a feeling of accomplishment within the team. Although the team had a rough start moving work through the queues, as we read in Davis' blog post here, they helped the process along by asking the hard questions every morning at the standup meeting in 15 minutes or less:

- Is there anything blocking you that's not on the board?
- With the issues on the board, is there somebody actively working to clear the issue?
- Do you need anything from management to get the issue cleared?

By shaping up their Kanban board, enforcing policies on it and introducing standups in a healthier way than they had during their sustainment process, the team drove other incremental changes that began to look more like the Kanban for IT teams that we know today.

Davis recalls the importance the Kanban board began to signify within their team, "you could stand back and get a picture of the overall system health, where the bottlenecks were, what the batch size of the next release would be, or you could stand closer and see that the same developer was assigned to multiple items and needed to be refocused on a single task. The board also became the focal point of discussions and planning for a variety of people on the team."

David J. Anderson is often referred to as the "father of Kanban" in the software development industry because of his pivotal role in crafting literature and networking opportunities that would help popularize Kanban in the world of IT. His first book, Agile Management for Software Engineering, published in 2003, served as the theoretical basis upon which the first Kanban team for knowledge work structured their implementation. His later book Kanban: Successful Evolutionary Change for your Technology Business, published in 2010, presented a more practical approach, informed by his experiences with bringing the intellectual framework that would help transform several other teams in the industry after the team at Corbis. In his works, David Anderson solidified the five principles of the Kanban method in knowledge work. The following principles would govern the breakdown of project on the newly implemented visual boards:

1. Visualization of the workflow

Fun fact? On average, people remember 58% of what they see and 10% of what they read. Kanban bets on the importance of 'seeing' in comparison to 'hearing', 'smelling' or any of the other senses. Vision is our dominant sense, it allows us to comprehend more quickly and to remember for a longer period of time what we see. If we are able to observe the flow of our work through a colour-coded, accessible and, most importantly, highly visible system, it makes a difference to our collaboration and communication as well as our individual understanding of the state of work.

2. Limiting Work in Progress

There should be strict limits on how many items could be worked on at once by a given team or a given team member at a time, so as to avoid overloading and multitasking. Limiting the number of unfinished items that are allowed to stay within the process motivated people to stop switching between tasks, reduced the work items that were left half-finished throughout the process steps and, ultimately, reduced the time it took for a work item to pass through all the phases of progress until it was completed.

3. Managing Flow

The goal of the Kanban board was to help manage the flow of work within a team in such a way that they could cultivate a smooth flow of finished work that could be stable and predictable. This way, more sophisticated ways of analyzing the process and making conclusions based on historical data could be implemented.

4. Making Process Policies Explicit

Without clear expectations of the certain stages of progress that were described on the Kanban board, the team would lose their way and each member would make use of the process structure differently, for mediocre results. In order to really work like a well-oiled machine, explicit process policies should be visually represented on the board in some way and followed strictly by all members of the team using the board.

5. Improving Collaboratively (using models & the scientific method)

Once the Kanban system is applied, it creates a platform around which the team can continuously improve. With a structure of managing work, the teams will be able to experiment, measure and transform certain parts of the process to see if they would have even more success along the way. Committing to always looking for more ways to be perfect is something that began to differentiate the Toyota company from their competitors and became a cornerstone of their professional philosophy.

Although Corbis as a company might have been ahead of its time, see Corbis on the Verge of Profitability, an article published by Reuters in 2005, and Bill Gates sells Corbis Picture Library to Visual China Group that came out later in the Financial Times in 2016, when the business was finally sold, their software process has improved dramatically since the inception of Kanban. According to everyone who was part of the team there, Kanban was a success and it helped the development team in the United States make the best of what they were working with.

As someone who has introduced Kanban in a field where it was not yet popular, it seems natural that David Anderson was the right person to comment about the potential of Kanban to cross over beyond the field of IT and help non-IT, business teams take advantage of its theory as well as its practice for optimal results.

We caught up with David to get his opinion on Kanban's transference to teams in the field of marketing.

So, David, will Kanban take in another industry? Will it have the same results.

I was always cautious in the beginning about making any claims that Kanban was applicable to a broader field than just software development. Around 2010, we began to see people applying it in recruitment departments and I had one client in Argentina where they "kanbanized" the whole company including finance and sales.

We now see significant adoption in marketing departments, ad agencies, web agencies, HR departments, market research firms, law firms and architectural offices. There have been sufficient examples that I'm now confident that Kanban can help all professional services business where the work product is classified as "intangible goods."

David Anderson teaching his professional masterclass of future Accredited Kanban Trainers

What is the future of Kanban, in general?

It's always difficult to make predictions, especially about the future!

However, we see broader and broader adoption across a wider set of professional services industries, using better and better tooling. Large scale implementations are coming and some firms are currently working towards up to 100,000 employees using Kanban to manage their daily work.

Large scale implementations require methods for scheduling, sequencing and selecting work, as well as strategies for risk hedging, demand shaping and managing capacity. We call this Enterprise Services Planning or ESP.

If the last 10 years have been about Kanban gaining acceptance, the next 10 years are about ESP gaining broad adoption across entire enterprises of thousands or tens of thousands of people.

What makes Kanban good for creatives, and not just engineers?

Creatives need help like all of us to relieve them of overburdening, to simplify stressful situations and smooth out the demands in their environment. Kanban helps people focus. It helps them achieve "flow", to focus on their customers and deliver better work product, faster and more predictably. Kanban enables people to take back control and take pride in their work again.

What will be most challenging to grasp for any marketer who is trying to implement Kanban within their team?

The first step is always to recognize "Who is the customer?" "What do they ask [us] for?" and "What are their service delivery expectations and tolerance thresholds?" The next step is to be able to view your own business as a network of services and to visualize a workflow of value-adding activities that are performed for each service. Next is to recognize that all service delivery activities have natural limits to their capacity and to act accordingly, set limits and respect them. These are things that are natural for people in physical, tangible goods industries but counter-intuitive for knowledge workers. If you can do these basic things then things will get dramatically better very quickly.

Kanban or Scrum, which method of application is better?

This is really a false choice. Kanban and Scrum aren't equivalents and they shouldn't be used to address the same issues. Scrum is a basic process that immature organizations adopt to help them organize their work. Kanban is generally applied to existing workflows where there is already some process discipline and a mature understanding of what service is being provided and the workflow required to do so. Kanban is used for improving existing processes. Scrum is used to provide basic process discipline. It uses a simple batch commitment and time-box mechanism. For many professional services batching and time-boxing aren't natural fits. An agency, for example, is unlikely to batch work from several clients or several campaigns. Kanban provides greater flexibility to tune up existing service delivery workflows and work in a manner that is natural to the business domain.

At the end of the day, do you buy the idea that digital marketing teams will use best practices from software development successfully?

I don't think of Kanban as a "best practice from software development". I think of Kanban as a collection of management disciplines that were initially applied in software development.

So, no I don’t see marketing departments adopting best practices from the software industry, what I see is marketing professionals learning to manage their work more effectively and provide improved customer service while enjoying a higher level of engagement and professional pride in the work product they are creating.

Kanban boards and the Lean principles are undergoing a transition out of the IT niche and into the mainstream.

The Kanban method, as a way of achieving further efficiency in a process, has proven its worth in the manufacturing and information technology sectors. Most teams agree that the necessary discipline, commitment to self-enforced policies and the quest for perfection are difficult concepts to adopt and a Kanban implementation goes along with some growing pains to really take off. However, successful applications of Kanban have brought success to teams in a variety of very disparate industries, such as legal, finance, healthcare, construction, software development, event management and more. The Lean principles on their own have managed to make such a significant impact on so many teams worldwide that the method of their application, Kanban, is on the verge of becoming a “no brainer” for entire leagues of project managers the world over.

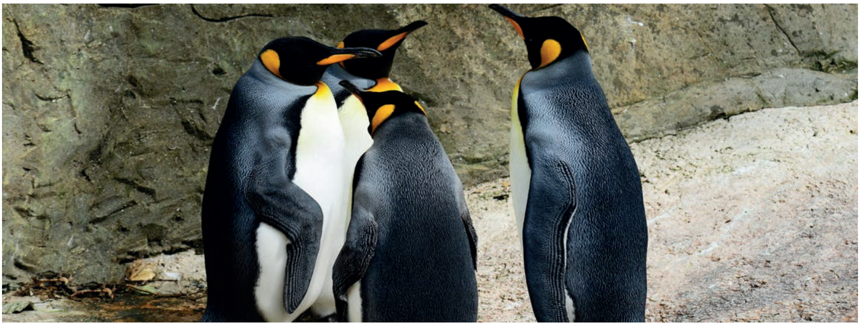
Those who have brought Kanban into their organizations and invested in educating their team members in Lean have never regretted it.

To support flexible and customizable implementations of Kanban in different sectors, Kanban software solutions have popped up in various formats in the software as a service world as open source or paid solutions. Physical Kanban boards, like those pictured above in the Corbis scenario, are widely being used as teaching tools during the education period of a new organization in the process of getting "kanbanized" before they are replaced by more sophisticated, digital boards that can accommodate remote team members and collect data from the work process automatically.

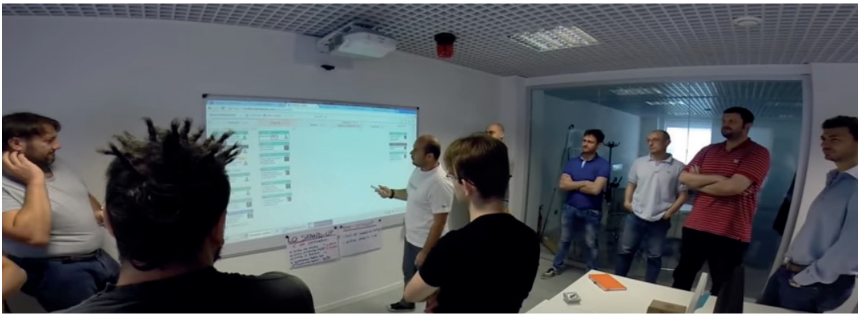
Team member accessing an online board made in the Kanban software for Lean management, Kanbanize (that her team in the office is working on) from the comfort of home.

Online Kanban boards, like the one pictured above, can be accessed from anywhere where there is an Internet connection, can update live automatically, can be configured to execute automations for recurring tasks and can, most importantly, collect data from the workflow that is used to generate forecasts and reports for stakeholders. We will get into that a little bit later, but what you need to know about Kanban as it exists today is that it is mostly applied through online software tools.

In order to maintain the visual aspect of the accessible Kanban (as we saw it in the middle of the factories at Toyota) and also to prevent the Kanban board from becoming just another tab on someone's computer, teams have found awesome, innovative ways of showcasing their digital Kanbans in the professional space.



A team doing their morning standup in front of their digital board on a dynamic touchscreen. Just kiddings...it's penguins! But, a standup is a similar to this, look at the humans below.



Onebip is a monetization enabler for Digital Merchants and App Developers that runs its processes on Kanban and Kanbanize as their platform. This is one of their morning standups.

Italian organization Onebip has also found a way to run their stand ups with a digital board that is physically present in their space, but also allows them to interact with their remote team members across the ocean. If you're accessing this book online, check out the Youtube video they made describing how they found a way to modernize their standups. For those of you reading the hardcopy, you can access the video at the link in the brackets (goo.gl/dmjTAl).

For education purposes, learning the principles of Lean and Kanban has also been fashioned into a board game. The getKanban board game was developed by Russell Healy, a consultant from New Zealand, who made the game so consultants could have a fun and simplified way of teaching new Kanban aficionados the basics of the method.

A group playing the (getkanban.com) getKanban board game at an educational event.

So, now that you have the context of how Kanban started and how far it has come in various industries—what is its future? If Kanban, as it was introduced in manufacturing at Toyota, and as it was introduced in IT at Corbis and many other companies in the same field, can work well for organization that were experiencing very visible process problems and inefficiencies, would the marketing industry be a likely candidate as the next frontier? In the next chapter, we will discuss why Kanban, as it has evolved in other industries, is particularly suited to marketing teams and consult with some professionals in the field who have successfully brought Kanban into digital agencies and marketing operations within larger companies.

Let's check out how they did it in practice.

CHAPTER FOUR

The Lean & Agile Marketing Community

As we grew the Kanbanize marketing team and explored the international community of those professionals in our field who were operating in similar ways, we met a lot of awesome people. I will always be extremely glad that the like-minded people we got in touch with for the writing of this book, for collaboration on articles and overall exchange of ideas were welcoming, inclusive and genuinely excited to talk about what we could all do better. This type of approach, I find, always wins out in the end. We were even more thrilled at the opportunity that they gave us to answer some of our most pressing questions about what the future holds for Lean, Agile and Kanban in terms of marketing.

One person who noticed the Kanban solutions to marketing problems is Andrea Fryrear, now an enthusiastic editor of theagilemarketer.com, an awesome website with wonderful content related to the baby steps towards applying Lean and Agile in your personal and professional endeavours.

She is also the author of Choosing from the Agile Buffet: Your Guide to Finding the Perfect Agile Marketing Methodology as well as Death of a Marketer. In addition, she is the Oxford-educated, Chief Content Officer of Fox Content and a Member of the Top 100 Content Marketing Influencers and Top 60 Marketing Speakers....so, if that wasn't enough she also loves volleyball, which in itself is enough to make me trust her.

Our content marketing team met Andrea during the outreach for this book and she was kind enough to let us know what her thoughts were about the future of the trade and the role of Lean & Agile in the world of marketers.

Andrea Fryrear speaking in front of a full house at the Digital Summit in DC.

How can marketers benefit from implementing best practices from Lean & Agile methodology?

There are more benefits for marketers in adopting a Lean/Agile approach than I can count. We can more effectively prioritize the work that matters, increase strategic alignment within the department and across the organization, and minimize the craziness of our day-to-day work. And that's just for starters.

Basically, Lean and Agile are the only sensible options for managing the complexity of modern marketing.

What does the IT crowd have in common with the Marketing crowd?

The main thing that IT and marketing have in common is that we've both experienced a professional situation that simply wasn't working. Missed deadlines, long hours, ineffective planst—they were a burden on IT years ago and they're a burden on marketing now.

In fact, given the complex technology we use daily, and the increasingly digital nature of marketing, marketers are behaving more and more like developers all the time.

> Agile helped developers, and it can help marketers too.

Is there any impediment to marketers adopting Kanban or Scrum in their teams? Something they should watch out for?

I think a lack of time holds marketers back from making all kinds of process changes. We're so busy trying to keep our heads above water that we don't stop and look for a better way to swim for shore.

The barriers to getting started with Scrum tend to be higher than Kanban. Because while Scrum calls for major up front adjustment, Kanban emphasizes on visualizing your current workflow. In both cases, however, busyness and a lack of knowledge can keep marketers from taking their first steps toward greater agility.

The main thing I'd caution marketers to watch out for in the early days is complacency. Don't relax and pat yourself on the back because you went Agile. It's an ongoing process of continuous improvement, not a one-time fix. It needs regular attention to truly thrive.

What are the organizational flaws that modern marketing teams experience that make them look for a leaner method of structuring their process?

There are so many, it's hard to know where to start.

First we have interruptions from above, in which executives demand work to be done at a particular time.

Then there are lateral interruptions that involve other teams asking marketing to contribute to their work with little notice.

And then there are structural flaws within marketing itself. Marketers are plagued by the fear of missing out (FOMO), which often leads us to start a lot and finish very little.

Each of these manifests itself in different ways, and each one can push a marketing team toward greater agility.

Kanban, Scrum or Scrumban is best for digital marketing teams?

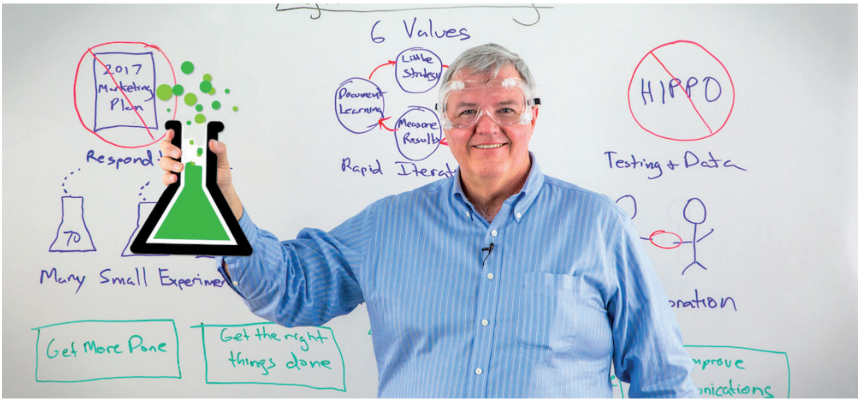
I honestly don't think you can prescribe a single approach that works for all, or even most, digital marketing teams. Each team has to be prepared to think critically about their unique situation and identify the best starting point for themselves, with a willingness to iterate on process.

With that said, if you don't have any idea where to start I'd suggest marketers start with Kanban or Scrumban, simply because these methodologies don't demand a change in their current workflow. But timeboxes may need to be added, as may more specific roles, so be prepared to make adjustments as you go.

How did you get into the Agile Marketing game? What role do you see yourself playing in this new trend in the way people work?

I came to Agile because it seemed to be a common sense solution to common marketing ailments. I put it into practice on my team, saw the results it produced, and I've been trying my hardest to spread the word ever since. My hope is to share this new approach to marketing with any and everyone who's interested in hearing it, so that marketing can take its place as the growth and innovation driver that it could be in the modern organization.

Andrea Fryrear is part of the same community as Jim Ewel, the next thought leader in the field of Agile Marketing that you will meet as part of this book. They often participate in industry events together and are vocal about the application of Agile methodology in contexts outside of IT. They collaborate often because they are the perfect mix of marketing savvy with a deep understanding of the software space and its best practices. Their content covers topics such as choosing the right Agile methodology for your team, coaching your team through the change, organizing and managing Agile teams, and making a smooth transition to Agile.



My favorite ever photo of Jim Ewel, in front of the infamous Moz WhiteBoard. Watch his WhiteBoard Friday guest appearance and read the accompanying blog post on The 6 Values (and 4 Benefits) of Agile Marketing.

The Kanbanize team met Jim in a very motivating stroke of luck during a discovery process for new opportunities. We wanted to collaborate on external content with people who thought that Lean and Agile would rock in marketing and any other industry. Jim runs a website called agilemarketing.net that we had all been following, so Dima (one of our gladiator content strategists) gave the idea of being a bit more proactive and showing off what we were working on to Jim via Skype. Basically, we became big fans of his. He had us at, "I love marketing. I think it's one of the most difficult and one of most exciting jobs in any company. I also think it's one of the least understood jobs."

Turns out, Jim had accumulated a ton of experience in coaching Lean while he ran his own companies, which he was kind enough to share with us, when we reached out (Thanks, Jim!) He used to be CEO of InDemand Interpreting, a technology-enabled medical services company that was in a bad way before he rebuilt the executive and sales teams, raised over $15M in private equity and increased sales by 225%. The result? InDemand was named three times to Inc.'s list of the fastest growing companies in the US. In 2014, Jim was a founding member of a company called Adometry that was sold to Google. Did I mention he already had 12 years of experience at Microsoft behind him before he did all that and more?

P.S. He went to cooking school in France…twice. So, don't mess with Jim.

Check out what he has to say about the use of Lean and Agile methodology in the context of marketing as well as what sorts of tips he can give teams that are just starting out their implementation of these best practices within their organizations. Here are the main takeaways from our interview with Jim Ewel:

Marketing teams can choose from flow-based methods (like Kanban) or iterative methods (like Scrum) when they structure their workflow depending on how much control they have over their work.

Either can work. I find that teams that don't have a lot of control over their work, either because they service other groups within the company (Creative/Design teams, for example) or they must respond in real-time (social media, for example) tend to favor flow (Kanban or Scrumban). Teams that have more control and are production-oriented (Content Marketing teams, for example) tend to favor iterations (Scrum).

> This approach facilitates the collaboration between marketing and other departments—like Sales and Development.

It does this in two particular ways. First off, if marketing is tracking their work on a Kanban board, this provides a great communication tool for other departments to see what marketing is working on and the status of work items. Second, if marketing invites other departments to contribute to the prioritization and definition of work items, either in the classic Sprint Planning meeting or in a more informal "fill the queue" meeting of Scrumban, this helps improve collaboration.

> Scrum and Kanban make sense for a marketing workflow.

All marketing departments have an existing workflow, however, too often this workflow is undocumented, inconsistent in its application, and the result is either lower quality or an achievement of quality by heroic efforts. Scrum and Kanban provide concrete ways to model and enforce that workflow, which also helps expose the waste and the bottlenecks in the workflow. It also improves team cooperation, and helps teams produce work in a consistent fashion without late nights and heroic efforts.

If Lean & Agile methodology lends itself to marketing, why did it take so long for adoption?

I'm not sure I agree with the premise of the question that it has taken "so long" for adoption. The term Scrum came from a 1986 paper called 'The New New Product Development Game' by Takeuchi and Nonaka. Jeff Sutherland and Ken Schwaber codified much of what we now think of as Scrum in the early 90's. The Agile Software development manifesto was published in February of 2001. Scrum and Agile Software development didn't go mainstream until the late 2000's. So we're talking 15-20 years. The first mentions of Agile Marketing were around 7-8 years ago, the Agile Marketing Manifesto was less than 5 years ago. That being said, Marketers are, by the very nature of their work, less process driven than software developers. Or at least they document and argue about their process much less.

What metrics should marketers be monitoring on their Kanban boards? Should they even be working on Kanban boards?

Yes, they should definitely be using Kanban boards. The visual aspect of Kanban boards is essential. Depending on whether they're practicing Scrum or Kanban/Scrumban, they should measure different things.

Practitioners of Scrum should measure:

- Sprint goal success rates
- Velocity
- Time to market
- Practitioners of Kanban/ Scrumban should measure:
- Lead time
- Cycle time
- Efficiency (time in work columns divided by time in queues)
- Throughput

However, it is very important for practitioners of both stripes to measure business success. It's not helpful to be pushing bad marketing out the door more efficiently. You have to select the right metrics up front to measure your marketing, and not select vanity metrics.

Some tips for marketing team just starting out adopting Lean & Agile…

- Tip 1: Build management reports. If Agile fails, it's usually because management doesn't support it.
- Tip 2: Get some training. I offer training, but so do a number of other wonderful people.
- Tip 3: Implement Agile in an Agile fashion. In other words, don't wait until you have the entire journey mapped out. Start somewhere and iterate your way to success.

There are some differences in emphasis when it comes to Lean or Agile marketing teams, but both put an emphasis on gradually improving over time through empirical observation of what works. The difference is that Lean is more about eliminating waste in a process that changes only slowly over time, whereas Agile is primarily about responding to change, even if that means some inefficiencies.

How do you get management on board with an implementation?

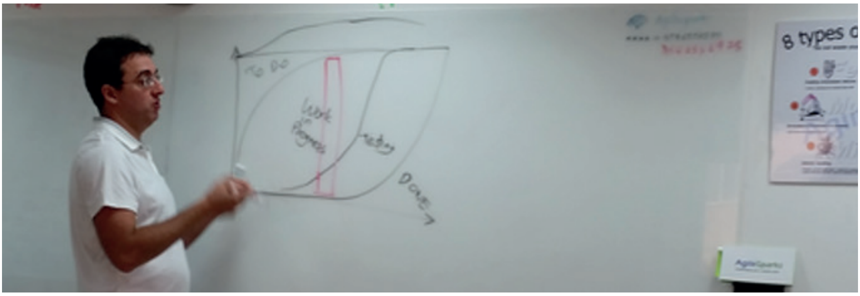
Every situation is different, but the key to getting management on board is to get them to agree to give it a chance, and then to deliver results and shout from the rooftops about those results.

What do software and marketing have in common? You've seen quite a bit of both.

The best software and the best marketing teams solve problems in an elegant way. Instagram allows people to modify their photos in a completely elegant way—that required very good design and very good programming. Apple's current ad for their bluetooth headphones, and even more directly, their original silhouette ads for the iPod, solve a marketing problem in a very elegant way—how do you convey the excitement of having a music server in the palm of your hand?

At the time Jim participated in this eBook by answering the above questions, it came to my attention that he and a well-known name in Lean and Agile, Yuval Yeret (who I had met before at several industry events in the US and Europe) were doing an Agile Marketing workshop in Boston. The workshop took place in May 2017 and was advertised as a class "for marketers and marketing leaders interested in addressing some of the challenges in marketing via a new marketing operating system." The leaders of the class were aiming to address their observation that "more and more CMOs are looking at Agile Marketing as the way to modernize their organization and make it faster and more responsive to the needs of the business while engaging and re-activating marketers that are simply struggling under the load and overheads of the old ways of doing marketing."

As this was probably the first more in-depth 2-day workshop on this topic I had seen popularized in my professional feed, I considered it an indication of the pertinence of this topic in the community. So, I decided to dig deeper and get back in touch with Yuval to find out how someone I had known as a purely Agile and Lean for IT coach and practitioner had arrived at the point of leading Agile Marketing workshops for CMOs.



A rather blurry picture of Yuval teaching in his natural habitat, whiteboard and all.

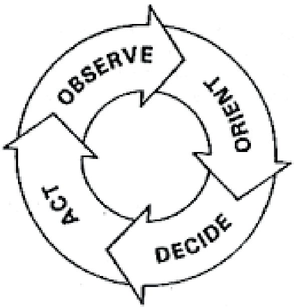
Yuval Yeret is part of the leadership team at Agile Sparks, a company led by a high profile team of experts in Agile/Lean that bring their results-oriented approach to help companies implement processes that will help them improve. Yuval himself has over 17 years of experience in technology management in IT and Product Development. He is also a recipient of the Lean Systems Society's Brickell Key Award for his efforts and teaching in the field. The Lean/Kanban in product development context was where I met Yuval for the first time in 2014. We would run into each other at industry events and new blog posts from his namesake website would pop up on my social media radar. After working as a consultant for a marketing agency in need of restructuring their processes in 2015, he has become very vocal about using Lean and Agile methodology in marketing and in other fields that are becoming increasingly digital. You can follow his thinking in the popular blog at YuvalYeret.com. I personally love his blog, especially since it has become more oriented towards Agile Marketing because he has some great stories about marketing teams he has consulted on the ground and doesn't bulk up his platform with theory—rather, with practice. As an example, check out his article on "Scaled Agile Marketing" in which he begins with, "one of my interesting engagements these days is with a corporate marketing group in one of the top global enterprise technology companies. They have a very serious agile initiative in product development and their CMO basically said—'I think I need Corporate Marketing to become agile as well.'" So we asked him what his experience has shown him—from his time in the Israeli Air Force to his leadership at AgileSparks.

So, Yuval, how did you get into the Lean and Agile marketing game? Did you start out in software development? Give us the backstory.

I actually started as a software developer in ITOps in the Israeli Air Force way back—What you might call DevNetSecOps these days. I moved to focus more on the development side but still in the infrastructure side of the world. In both these areas was a mix of hands-on roles with leadership roles. I switched to Agile consulting back in 2009 and haven't looked back since. I love helping people change their work environment. Mostly, it's been people in software development organizations. Late 2015, I was invited to help a marketing organization become more agile. The main reason they approached me was because I'm known as a pragmatic lean/agile consultant that knows how to help figure out a working approach grounded in the principles rather than dogmatically following a book.

What do marketers need to be successful? How do methods like Kanban help?

I think marketers need a modern operating system. One that is actually a more natural fit to how we as humans behave. If you look at it closely in our day-to-day life, we run a very tight "inspect and adapt" loop.



We observe what's going on, make decisions, act on them, and observe again. Be it when walking, driving, talking, we are very "Agile" by design. Sadly enough, we've adopted a different approach in the workplace. Methods like Kanban can help us fight the existing status quo and help marketers adopt a more responsive, adaptive, and humane marketing operating system that helps them deliver better results for the business they're supporting while having more fun and less stress doing it.

I've heard it said that "Criminal organizations are faster because they don't tolerate inefficiencies." If marketing focuses on eliminating inefficiency, how will they benefit?

I haven't heard that before. It's funny! Sounds possible although I'm sure as crime organizations grow they probably suffer from the same problems technology and marketing organizations suffer from...

Anyhow—one key perspective around inefficiencies and waste is the "value stream" lens. Let's look at the flow of the typical idea/need through decision, planning, creating, launching, learning and tweaking, all the way to actually delivering marketing value to the organization. Along the way, we will probably find a lot of inefficiencies in the form of delays, being blocked waiting for somebody, waiting for some gate—e.g. a review meeting with a senior executive or vendor selection for a pool of marketing activities. These inefficiencies obviously cause our time through the value stream to grow larger. The first impact is obviously what we call "Cost of Delay"—the price of being late to market. Or conversely, if we're very efficient we can affect the buyer's journey much more quickly as soon as we identify an opportunity.

The other impact is that long cycles lead to late and weak learning/feedback loops. When that's the case, marketers tend to spend a long time carefully thinking and planning up front. Which would be good if we actually knew for certain what would be the impact of our marketing actions. Alas, in many cases we don't, and this over-thinking and over-doing turns out as another form of waste.

Accelerating the feedback loop enables marketers to adopt a leaner approach that minimizes waste. That way, they can actually deliver more marketing impact with the same amount of time.

Another inefficiency is aiming for 100% utilization—working on too many things in parallel, under crazy deadlines. When that's the case, people can't innovate. You pay a huge price due to context-switches. Marketers eventually burn out and you get disengaged marketers that are obviously not as productive as they could be and probably not that fun to work with… they might even leave causing us to waste a lot of energy finding replacements and training them.

By starting to "shape demand" and moving to Pull-based scheduling as well as limiting the amount of "projects" each marketer is involved with, we become a healthier, safer workplace that will actually attract great marketers rather than repel them. We will be more productive and deliver our top priority initiatives faster and with higher quality/professionalism.

Can you give us some examples of clients you might have consulted that were successful with this approach?

The largest and best example of a successful marketing with Kanban implementation was CA Technologies. I'm working with the global corporate marketing organization to help them figure out how to transform to be an Agile marketing organization. This is a 300+ person marketing organization so obviously it is a long journey. It is very different than working with a 200-person technology company with a ~20-person marketing organization like Perfecto Mobile which is another example. I can tell you the same principles apply across the gamut. Some of the practices look the same but obviously some of them look different. For larger-scale organizations some of the scaling approaches like the Scaled Agile Framework come in handy, at least as inspiration.

Just as an aside to this interview and the mention of some contexts in which Yuval has consulted organizations to adopt Agile at scale in their marketing departments, you can hear Yuval and Steve Wolfe, of CA technologies, discuss the following topics surrounding CA's Agile marketing transformation:

- Using Agile to manage what can feel like an overwhelming amount of incoming marketing requests
- How they are developing an Agile implementation from the bottom up and top down
- How to implement Agile with highly distributed teams and in a siloed context

In 2016, the two participated in a podcast for agilemarketingblog.com that you can listen to for more details.

What are the biggest barriers to adopting Lean and Agile principles in Marketing?

The biggest barriers to adopting Lean and Agile principles in Marketing is the conviction that there is "no time to improve". The day to day churn. Many marketers I talk to don't have the time for upgrading their operating system. I believe that real change towards agile marketing needs to involve marketing leaders otherwise you hit a glass ceiling very quickly.

Another barrier is the "Agile Theater". This is my term for "going through the motions" and thinking "you are agile" just because you have a "scrum master" and are doing a "daily scrum". A lot of marketers I talk to say "oh yes we are already very agile" but their definition is not my definition. I created the "Agile Marketing Depth Assessment" to try and address this. It provides a set of concrete questions you can ask yourself to figure out how agile you really are and ideally drive you to explore ways to dive deeper.

One of the slides in the abovementioned Agile Marketing Depth Analysis that defines the different levels at which marketing teams might find themselves in terms of their Agile transformation.

In one of your recent articles on Agile Marketing, you mentioned—"...don't just plan tasks. Plan experiments aimed at validating assumptions. Plan to learn. Plan to iterate." Can you go into more detail about the differences of these two approaches?

In a recent liftoff event for a couple of marketing teams, I noticed that while these teams were working to plan their "quarter" at a high level, there was a feeling that they're creating a list of activities they will increment on throughout the quarter. They will try to deliver some activities and have an impact every 2 weeks. But that's just one part of what agility is about. I mentioned the learning/feedback loop above. It helps to be very conscious about what you don't know, what you hope to learn, as part of the planning exercise. I like the "validation board" used in Lean startup circles since it explicitly asks you to think about assumptions you haven't validated and to design experiments for validating them.

Kanban or Scrum is better suited to the marketing process? Why?

Kanban has the advantage that it better supports the interrupt fast-moving mode that a lot of marketing teams are in. So it seems like a more natural fit.

Scrum is more structured and with its focus on timeboxes helps teams focus. I actually think that for many teams the

Scrum “don’t interrupt now, wait until the end of the sprint” approach might be exactly what the doctor ordered. It might be tough to “shape demand” that way. but Agile isn’t about easy. If it’s too easy you’re probably not improving much. Having said that, it really depends on the openness and opportunity for change and whether the ecosystem is ripe for a revolution or an evolution. In some cases, starting with Kanban and then applying some of the Scrum practices when the time is right is the right approach. In others—better start with a Scrum and take advantage of an atmosphere of change.

And really, my favorite for years now is Scrumban—combining the Scrum Agile Team and timeboxes with Kanban flow management. I also think a Scrum Master or an Agile Coach is a good idea especially since most marketers haven’t had any exposure to Agile so need some support in changing their mindset and practices. The jury’s out on whether a Product Owner makes sense in a marketing environment. Based on my experience, in most cases, the marketing team can figure out their “user stories”. A Product Owner might make sense at a higher level of establishing focus areas and goals (let’s call them epics or features, maybe?).

I guess it really depends on you context and the people involved.

Can you share some tips for new marketing organizations or digital agencies that might be thinking of structuring their workflow on a Kanban board?

- Tip 1: Make sure "learn/feedback" is part of your workflow!
- Tip 2: Focus on slices that can actually get to "learn/feedback" from the market—this will lead to managing "working marketing deliverables" rather than technical tasks.
- Tip 3: In your workflow stages/lane names use activities rather than roles. This lends itself better to collaboration across the functions in a cross-functional Agile team.

The interviews we compiled for this book aimed to present thought leaders within the newly formed (and forming) community surrounding Lean and Agile methodology in practice in the field of Marketing and why it is so necessary. By uniting their standpoints in this eBook, our team wants to harness the essence of what is to come from this professional community and the direction they are headed. Look forward to their collaborations amongst each other all over the world in order to bring practical workshops, thought-provoking talks and exceptional strategies that are sure to catapult Lean and Agile Marketing towards the places where it can have the most impact and help the most teams.

CHAPTER FIVE

Three Deep Marketing

A Lean digital marketing agency that runs on Kanban

"We knew that if we wanted to grow and get the customers that we wanted, we had to be Lean," says Dan Woodbeck, the Director of Operations of the Minnesota digital agency Three Deep Marketing, founded in 2003. Three Deep is a company that grew from a handful employees to fifty people (currently) by providing performance digital marketing to their enterprise and SMB customers, locally and nationally, from their base in St.Paul. Their customers include Gerber, Nestle and Red Wing Shoes. As the company began to develop its identity and grow a portfolio of work, they began to craft their MO at the intersection of marketing and technology. Jeff Sauer, former Vice President of interactive marketing and current shareholder at Three Deep says, “the way we leverage technology differentiates us from competitors,” in an interview for finance-commerce.com. “We’re not just concentrating on today’s problems—we’re setting up our clients for future success as well,” Sauer continued. The company website sums up the one-stop-shop agency’s promise:

As the organization began to take on more and more challenging technological projects that would make sure even larger players could benefit from their approach, as described above, the team members and the leadership began to see the need for a visual, efficient workflow that could keep everything on track. They would need to map their initiatives in email marketing, website development services, strategy consulting and others in a central location that could improve the communication with the newly-formed teams by preventing silos.

Members of the team at Three Deep Marketing in 2013

The leadership team at Three Deep reasoned that as marketing became more digital, marketers should also adopt methodologies from the IT field in order to structure their processes.

Luckily, Dave Woodbeck, Dan's brother, and the CEO of Three Deep Marketing is a dedicated student of Lean and Agile since the early days of his career. The team recognized the potential of Lean & Agile methodologies that their developers and quality assurance team were already familiar with, to become the core of their entire company operations. Almost four years ago, the members of the leadership team got together to explore how they could transform their growing digital marketing agency into a Lean and Agile shop and become known for being more modern and efficient than their competitors. Enter Kanban: the method this agency chose for their application of the principles of Lean for best results.

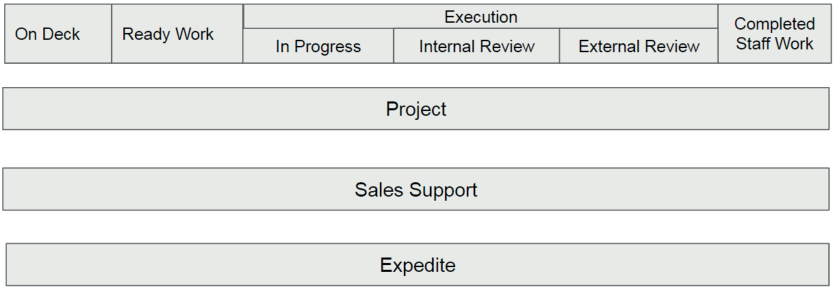
Kanban at Three Deep Marketing started in the technology department.

As a digital agency, the team provides marketing automation and web development services to the customers who need them in order to generate more leads for their businesses. The development team works closely with the QA department in order to consistently deliver high-quality solutions to the Three Deep customer base. The team themselves claim that a testament to a job well done is customer satisfaction.

The QA Team's Kanban Board

In the early stages of the Kanban implementation at Three Deep Marketing, John Tinsley led the QA as well as the Tech teams using the Kanban board below.

The QA team's digital Kanban board looks like this:



Three Deep Marketing's QA team works on this digital Kanban board, made in Kanbanize.

As the organization grew, the two groups became larger and more defined in their duties.

In their current structure, the QA and Software Dev teams each have their own Kanbanize board within the same account. It is mandated that all the boards have a board structure similar to the one we see in the image above, then each individual team customizes, adding more columns to indicate the particular stages of their workflows. When teams work together, their board sometimes interact by visualizing the relationships between the tasks on one board with the tasks on the other board.

The Mandated Columns between the two technology teams are are:

ON DECK

Work intended for commitment in the following sprint

IN PROGRESS

Work that is currently in progress by a resource

READY WORK

Work that is committed

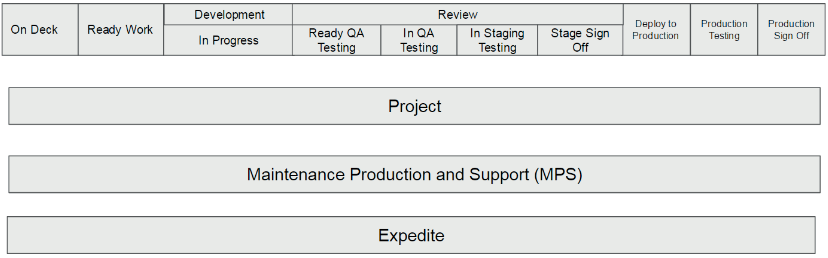
COMPLETED STAFF WORK

Work that is completed and signed off

The QA team holds delivery planning meetings with each service line on Fridays to review the work accomplished for the current week. Then, they review the backlog and On Deck columns to plan what work they will plan for the next week, then visualize these chosen cards in the Ready Work column, beyond the Backlog and closer to the In Progress section.

The Development Team's Kanban Board

As the Tech team is now considered a separate entity from the QA team (earlier in the company's history, the teams were smaller and operated together on one board), they now operate on their own Kanban board, under the leadership of Justin Hayes. The Tech team's digital Kanban board looks like this:



Three Deep Marketing's development team works on this digital Kanban board made in Kanbanize.

Justin Hayes, the Tech lead describes the types of tasks they have occasion to deal with in the team. These manifest on their Kanban board as swimlanes.

PROJECT

This lane is meant to capture the project work for our clients. Project work is typically work that takes more than one developer day (~6 hours or 3+ story points) to produce.

MAINTENANCE/PRODUCTION SUPPORT (MPS)

These cards represent relatively simple, i.e. Quick Hit, items that need to be produced. These cards have a 5 day SLA from the time the cards are placed in the "Ready Development" column. **These are not bugs.** Bugs go along with the intended development card. MPS items are typically:

- 1/2 developer day or less (3 hours)
- 1 developer day or less (6 hours)

EXPEDITE

Items in this swimlane require Immediate execution while all other work is impacted. Expedite is an 'emergency' situation that will cause us to STOP work on other projects and maintenance items to complete. Expedite items should be decided as a team as it will cause other work to be put at risk of being delayed.

The team decides which tasks will be deemed Expedite by asking the following 3 questions:

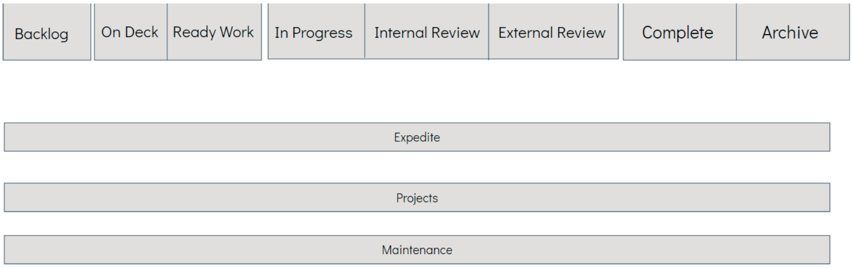
1. Is the service provided impacted? (ex. Site down or Web Service Down)
2. Is ROI impacted? (in other words—Is the client losing money?)
3. Is the brand at risk?

The software development process at Three Deep, as in any marketing agency, is also intrinsically linked to the initiatives of the marketing, content and operations teams.

In order to work collaboratively with the software developers and quality assurance engineers on the same platform, the digital production, content and design teams at Three Deep also found it necessary to map their projects to their customized online Kanban boards.

The Marketing Departments’ Kanban Boards

Some of the marketing-related Kanban board structures that Three Deep Marketing is making use of include the following:



SEO and CONTENT Kanban Board

In which the columns of the board serve the following purposes:

BACKLOG

Ideas that have not been promised or prioritized yet live here.

ON DECK

Used to prioritize cards that will be tackled next. The individual team members who submitted the idea to the backlog participate in the distribution of the cards in this column. When moved from Backlog to On Deck, an “Assignee” of the card might be set or can be left at “None” until the next step in the process. Which cards move into this column is decided at a weekly planning meeting with stakeholders.

READY WORK

Prioritized Cards that are committed and ready to move through the process. The external stakeholders will set the priority by participating in the board. A team lead will break down work into smaller units if deemed necessary to pull through the process more efficiently.

IN PROGRESS

Cards are pulled into "In Progress" from "Ready Work" when they are ready to be executed. The card is assigned to the resource who will execute the work. Card will be moved to "Internal Review" when work is completed and card will be assigned to appropriate stakeholder along with a mention made in the comments to the assignee. WIP should be 1 per subject matter expert.

INTERNAL REVIEW

Cards are reviewed and approved or not approved by stakeholder. Assignee is set to the name of the resource who will be responsible for reviewing the work.

EXTERNAL REVIEW

Cards are reviewed and approved or not approved by client or vendor.

In which the swimlanes on the board serve the following purposes:

EXPEDITE

Work that is considered an emergency

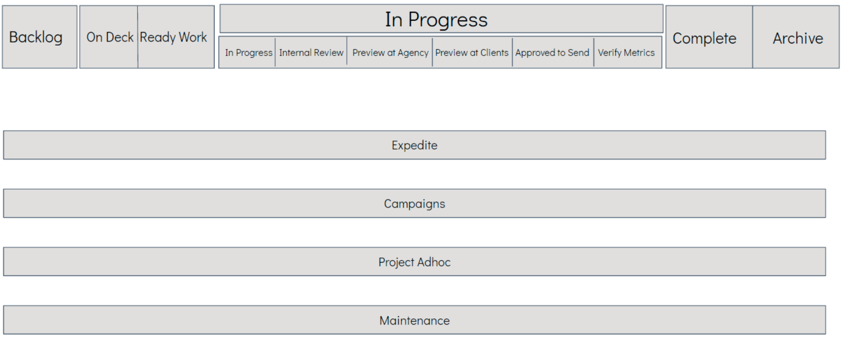
Policy SLA is a fixed time based on negotiated project.

PROJECT

Work that is identified as having a fixed date and with inputs that are specific to a project or deliverable that may have a large output. These tasks will also have a high potential for variance of change from the time requested to the time of completion.

MAINTENANCE

Work that is identified as being standard or recurring that has known inputs and outputs. Policy SLA is 5 business days based on time a complete ask was provided and when the work was committed.



EMAIL MARKETING Kanban Board

In which the columns of the board serve the following purposes:

ON DECK

Cards are cards acknowledged by the Email team to be ready to work on.

When email campaign cards are pulled into the workflow the deadline is when the preview is to be sent. Then the deadline is changed as the process goes depending on when reviews and approvals are gained.

READY WORK

Prioritized Cards that are promised and ready to move through the process.

IN PROGRESS

Execute Cards in this column when you have capacity

INTERNAL REVIEW

Preview the email internally to validate functional, content, and copywriting before sending to agency or client for review. This preview should always be used unless stated otherwise by the team.

PREVIEWS AT AGENCY

Cards are reviewed and approved or not approved by the client or vendor.

PREVIEWS AT CLIENT

Email projects that have been approved by the partner agency for client previews. Once previews are approved, please assign the card to an Email Specialist and move it to the next column.

APPROVED TO SEND

Email projects that have been approved by both the agency and the client. Please check in with email team resource the day of send to be sure everyone is on the same page. If a card is approved to send, and then the campaign is sent, the card will be moved by the stakeholder to the "Verify Metrics" column. It will then get a due date of 7 days from the previous due date.

VERIFY METRICS

Complete the project by sending a metrics report. All cards in this column will have a due date of 7 days from the previous due date. The subject matter expert will then pull metrics, validate against the initial count to confirm no issue with the send, then send metrics to the stakeholder or client. In the event that the send numbers do not align to the expected send, the subject matter expert will troubleshoot, notify the internal stakeholder, and take action to rectify.

COMPLETE

Completed work to be archived. On a weekly basis (Friday or Monday) the subject matter expert moves "Completed" cards to "Temporary Archive".

In which the swimlanes on the board serve the following purposes:

EXPEDITE

Work that is considered an emergency—which is defined by the three questions listed above.

CAMPAIGN

Email campaigns must have:

1. Email Request Form
2. GA Link Documentation
3. Legal Approved Creative PSD

SLA

Already Coded = 5 days (stakeholder previews and campaign deployment)
Three Deep (in house) Coding = 7 days (coding, render tests, QA, stakeholder previews, campaign deployment)

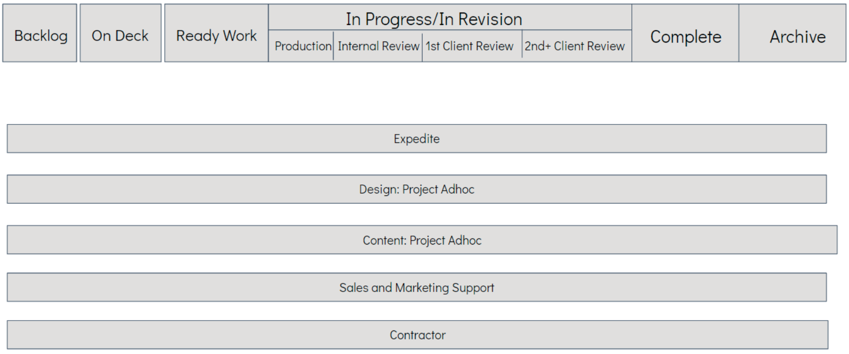
PROJECT ADHOC

Work that is identified as having a fixed date and with inputs and outputs that are specific to a project or deliverable that may have a high degree of variance on what is asked to what is being delivered. More specifically a potential for a high variance of change from the time requested to time of completion. Policy SLA is fixed time based on negotiated project.

MAINTENANCE

Work that is identified as being standard or recurring that has known inputs and outputs—for example, monthly reporting. Due upon negotiated and/or contractual agreement.

A Kanban board for the Design Content they create in house as well as with freelancers:



DESIGN Kanban Board

In which the columns of the board serve the following purposes:

BACKLOG

Where ideas that have not yet been promised live.

ON DECK

Ideas that have been promised to the stakeholder and have to move further through the stages of the board.

READY WORK

Work items that have been prioritized, have deadlines and a good idea of which resource will handle them.

PRODUCTION

Cards that are being worked on live here.

INTERNAL REVIEW

Preview design internally to validate elements before sending to agency or client for review. This preview should always be used unless stated otherwise by the team.

1ST CLIENT REVIEW

Design projects that have been approved by the partner agency for client previews. Once previews are approved, the cards in this column get moved to Complete.

2ND+ CLIENT REVIEW

When a design project goes back into production after 1st client review and then moves into a 2nd additional client review, it waits here. Use this column to measure how many of the design tasks passing through the workflow require more than one external review before being approved.

COMPLETE

Design that have been approved and applied accordingly to the projects for which the designs were commissioned.

ARCHIVE

Work items get archived into the "Temporary Archive" once a week from the Completed column.

In which the swimlanes on the board serve the following purposes:

EXPEDITE

Work that is considered an emergency—which is defined by the three questions listed above.

DESIGN PROJECT ADHOC

Work that is identified as having a fixed date and with inputs/outputs that are specific to a purely design-related project or deliverable that may have a high degree of variance on what is asked to what is being delivered.

CONTENT PROJECT ADHOC

Work that is identified as having a fixed date and with inputs and outputs that are specific to a content-related project or deliverable that may have a high degree of variance on what is asked to what is being delivered. Design team participates in content creation via this dedicated swimlane.

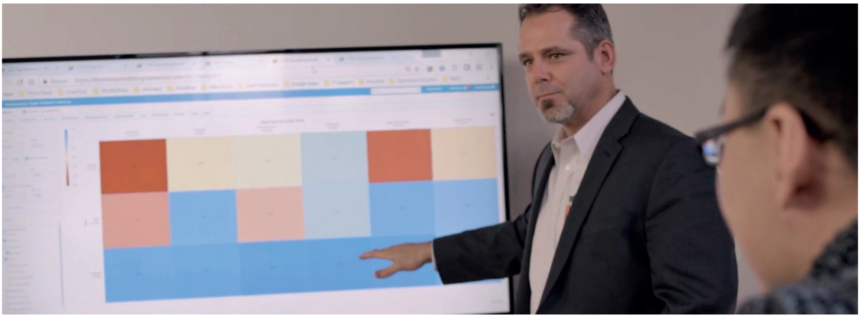
SALES AND MARKETING SUPPORT

Work that has been commissioned internally to support initiatives of the Marketing and Sales teams —ex. Marketing materials for events that the company will participate in, promo codes for prize, banners, business cards and other such work items.

CONTRACTOR

Use this swimlane to track work items belonging to external or other freelance contributors to the project. Ask the contractor to collaborate with the team on the board itself or ask the lead designer to reflect his/her status in this swimlane.

Dan Woodbeck, leading operations at Three Deep since the company's inception, is the Kanban method's most enthusiastic inhouse evangelist. Since the company was introduced to the Kanban method, 3 to 4 years ago, Dan has helped the team transition from a physical to a digital board in order to suit the way they work and has enforced the policies on the currently active boards that they use on a day-to-day basis. "We have enough experience in the industry to know that the Lean methodology will produce better results not just for us as an agency but for our clients. The world of Waterfall or the world of chaos that rules agencies is a strategy that, from what I've seen, tends to always fail—the projects are over time and over budget…" says Woodbeck of his experience working as a part of other marketing agencies who are still using more traditional models of project management.



Dan Woodbeck in front of a Heat Map, generated by the data automatically collected using the digital Kanban board on which one of his teams collaborates.

He believes that adopting the Lean methodology through Kanban has helped his team grow and understand how they can be most effective for their customers, while also managing client expectations in a clear, inclusive and transparent way. He has even encouraged the use of client-specific boards on which his team can collaborate directly with the stakeholders they are working with. Dan believes that, "when you talk about Lean, when you talk about Agile, you're talking about an iterative approach and eventually you're going to have to get your client involved in that because when they get their product, they will get a better product. By working on a board together, we can help them help us determine what the priorities should be for that particular week or that particular month."

By sharing the Lean principles with their customers, Three Deep is revolutionizing the way agency work in the marketing field is being executed. What their approach actually represents is a way for clients and agencies to participate in the development of new products and content in a way that is continuously collaborative and flow-based, as opposed to occurring in spurts and chaotic. In this way, the clients can move work that they are participating in along through the system structure and to have clearer expectations and control over the creative process that comes with their fulfillment.

When we caught up with the Director of Marketing, Taylor Pettis, he identified the main benefits of having the marketing team break down their initiatives and map their daily tasks on a Kanban board while also following the principles of Lean.

> "An online Kanban board is a great way for us in the Marketing department to submit work towards the other departments. We can make task cards for other team members and track their progress," says Pettis. He also adds that it has, "eliminated the need for fly-by visits and created a lot more efficient communication because of its visibility."

By adopting the Lean principle of continuous improvement both with their customers as well as internally within the team itself, Three Deep Marketing has managed to distinguish itself by building 7 agency certified partnerships, with organizations such as Google and IBM as well as by making sure their staff members maintain up-to-date knowledge of their own field by acquisition of the 43 individual certifications held by Three Deep team members.

In 2017, the company was named one of the TOP 100 Best Companies to Work For by Minnesota Business Magazine.

Three Deep employees enjoy the freedom to work from Three Deep's custom on-site bar. Picture from Minnesota Business Magazine.

CHAPTER SIX

Your Next Steps as a Lean & Agile Marketer

As it stands, the traditions in Lean and Agile Marketing are still quite new to the business units in any organization. In terms of Geoffrey Moore's presentation of the metaphorical chasm that any new innovations come up against before becoming mainstream, Lean Marketing has not crossed it yet. Its benefits as an approach are still misunderstood or outright unknown. It is the responsibility of modern marketers to bring Lean Marketing into the business by applying the Kanban method within their organizations, optimally and with dedication.

Perhaps, having frequent interactions with production units, IT Support departments or development within your organizations might have exposed you to some of the Kanban principles and their practical application, as discussed in this eBook. However, if this is all new to you, it is probably also new to your team members. I urge you to be the innovator of the bunch and introduce Lean, Agile and the Kanban method to those with whom you work. In the long run, you may very well end up initiating the implementation of positive Lean practices within your entire organization, team or on an individual level. If you commit to implementing Lean and Kanban with discipline and perseverance, your results will show for it and the people you collaborate with as well as the stakeholders that depend on you (and vice versa), will thank you for it.

Right now, marketers are using a long list of solutions in order to fit existing tooling to their use case and attempt to solve their many problems. The novelty of this extremely promising, but widely undiscovered, approach also reflects on the ability of future marketers to get proper executive buy-in for the approval of their shift over to more modern methods. Chances are, top level managers have still not connected the business challenges they are aware of to the operational and cultural changes that the adoption of Lean and Agile suggest. In order for these principles and values to become associated more widely, not only with IT and Manufacturing, but to actually permeate the business, marketing professionals must help to facilitate this.

My advice when it comes to implementing something new, whatever it may be, is to educate yourself about where other teams before you have failed and succeeded. That's certainly what I did when the implication of this use case piqued by interest. Although the literature on specific case studies of fruitful applications of these methodologies in marketing teams are quite rare, the theory and the thinking behind this innovation is discussed from different aspects in the following seven books that you should definitely read before you undertake anything.

- Growth Hacker Marketing by Ryan Holiday
- Hacking Marketing by Scott Brinker
- The Agile Buffet by Andrea Fryrear
- The Agile Marketer by Roland Smart
- Agile Marketing by Jeff Julian
- You Should Test That by Chris Goward
- Crossing the Chasm by Geoffrey Moore

As marketers, we are in a sublimely unique position within our organizations. We are at the core of the action when it comes to how our customers perceive our products or services and how our organizations build them.

However, the challenges that we face are many:

- lack of communication with other departments (mainly sales and product management)
- lack of experienced staff
- lack of reporting
- lack of budget
- lack of expectation management with executives (ex. routine marketing plans for a year ahead)

Luckily, there is a strong case for the ability of applying principles from Lean and Agile methodologies to fix our process problems. These vehicles of process optimization have proven themselves in organizations operating in other industries and can now be applied with more confidence in the business units of any company…and marketing can bring them in.

The goal of this book was to show you the various WHYs and some actionable HOWs of applying the principles of Lean and Kanban in your marketing teams. In showing you various practitioners in the field, two case studies of successful implementations of Kanban in a Marketing context and a wide variety of resources you can use to continue your exploration in this field, I hope that you will have a base to reach new heights with your team and help Kanban cross the chasm into the whole organization. The great thing about these methods and methodologies is that they do not require you to turn your entire existing process on its head and start worshipping new idols.

You can start with what you do now and build upon it when you sense that your team members are ready.

Start with a visual Kanban board and some WIP limits to get you thinking in the right direction, everything else will follow organically as you commit to growing and maturing.

What's even better is that you don't need to choose between the two methodologies presented in this book. Lean & Agile do not necessarily compete, which one you use will depend largely on your project's dependencies and the nature of the deadlines that come from your customers/clients. Make sure to start with what you have, document along the way and track the progress of your flow as your process matures. If you are someone who has already applied Lean and Agile to their marketing team/organization, is currently doing it or is planning to do it in order to achieve optimal results, please reach out to our community. Myself as well as the people interviewed in this book are excited to meet project managers, team leads, and CMOs who have a strong commitment to delivering value, being efficient, promoting visibility in the workflow and pursuing perfection along with the other members of their organizations. We can't wait to hear your Lean and Agile Marketing story!

What types of teams can use the contents of this book to become more efficient and effective?

- Content Marketers
- Digital Marketing and SEO
- PR & Communications
- Email Marketing
- Design
- Promotional App Development
- Web Development
- Event Management

From where I sit, the list could go on further because of the flexibility and the widely applicable nature of the principles and values that Kanban and Lean represent.

What kinds of marketing projects can you break down on a Kanban board?

In preparation for writing Lean and Agile Marketing with Kanban, I was thrilled to see and hear about the following scenarios in which various types of marketing teams broke through the chaos and structured a visual, transparent and value-driven process for themselves and to the satisfaction of their customers:

- Content Creation
- Website SEO
- Collaborative projects with freelancers / external parties (work together on a digital board remotely!)
- Design and Development of a new website
- An iterative Adwords campaign
- Outreach to influencers
- The crafting of a press release
- Media discovery and communications
- Design and Development of a Landing Page
- Content review process with an external customer with access to the board
- Developing a mobile app
- Print Publishing

Thanks to everyone who contributed to making this Lean and Agile Marketing with Kanban eBook better and thanks to everyone at Kanbanize who supported the process of its completion, from A–Z. Special thanks to Dimitar Karaivanov for giving me the example and the courage to embark on the journey of writing at all. If you saw yourself and your team in any of the topics and challenges discussed in this eBook or anything at all struck you as something you would like to try with your own marketing team, then I encourage you to…

…test Kanban…

…and join the marketing process revolution.