**The Twelve-Week Agile Marketing Adoption Plan**

This plan is meant to be a starting point for a conversation. Every organization is different and has different needs. It is a rapid adoption plan. I don’t recommend moving much faster than this plan. Change takes time. If your organization needs more time, take it.

I’ve used terminology from Scrum, specifically describing Sprints. If you practice Kanban, don’t worry about this. Just follow along week by week. I do recommend that even if you practice Kanban, that you hold Reviews and Retrospectives during the first twelve weeks. After that, you can hold them as needed.

I also refer to pages and chapters of my book *The Six Disciplines of Agile Marketing*. While you don’t need the book to implement this plan, it will certainly help.

If you have feedback on the plan, I’d love to hear it. Send me email at jim@agilemarketing.net.

**Sprint zero (weeks 1 and 2)**

*Theme: Getting Aligned, Getting Ready*

* Training – get training from an Agile marketing specialist for the entire team. Scrum Master training can help scrum masters but won’t help the team. You also need someone who can translate Agile terms and techniques designed to manage software development into terms and techniques that work for marketing. Consider getting certification training. [IC-Agile](https://www.icagile.com/Business-Agility/Operating-with-Agility/Agility-in-Marketing) qualifies both trainers and their courses and delivers a formal certification.
* Get aligned on the big 3 questions (Chapter 5)
  + Why are you adopting Agile marketing?
  + What does success look like?
  + How will you measure whether you are succeeding or not?
* Complete the poster exercise and distribute the poster broadly (Chapter 20, page 200)
* Get aligned with your business teams or your clients if you’re an agency. Explain what you’re doing, but don’t use Agile language. Align on twhat is most important for them and how you’re going to measure it, how much they want to be involved, and schedule Review sessions for the first twelve weeks according to the schedule below (even if you’re practicing Kanban).
* Form 1 or 2 cross-functional teams (Chapter 6). Don’t try to convert the entire organization to cross-functional teams. Start slow and learn what works for you.
* Decide which methodology you’re going to use: Scrum, Kanban or formal Scrumban (Chapters 7-10). If you think you want to combine some of the best practices of Scrum and Kanban into your own version of Scrumban, don’t. You can practice Scrumban, but only the formal version described in Chapter 10. Don’t worry, you can switch methodologies later or combine the best of the three methodologies to fit your organization’s needs. But don’t do this until you deeply understand the formal methodologies with all of their practices intact.
* Select a tracking tool. Choose one that was designed for Agile, not one where Agile was retrofitted on to an older tool.
* Build your initial backlog of deliverables and tasks (Chapter 8). Make sure each deliverable has a user story and that you have more deliverables than tasks.
* Design your Kanban boards (Chapter 9). Make sure you have a small number of process policies, work-in-progress limits (WIP) and queues. Don’t go overboard on process policies or WIP limits. Start small.
* Negotiate Service level agreements (SLAs) where you have any external dependencies on other parts of the organization, contractors, or outside agencies
* Hold your first Sprint planning session or Kanban prioritization session.
* Appoint at least two middle managers and one senior leader to the Agile leadership council.
* Hold your first Agile leadership council meeting, explaining everything you’ve done so far and getting their commitment to help you. Also make sure that they’re committed to de-centralized decision making. Have an honest conversation about where decisions should be made. You’re almost certainly still making too many decisions to high in the organization.
* Optional: Agree as a team on a first draft of a marketing model canvas (pages 40-42).
* Optional: Create personas for your top 2-3 buyers or influencers (Chapter 17).

**Sprint One (weeks 3 and 4)**

*Theme: Achieving some initial successes*

* Under commit – my usual recommendation is that you plan your initial Sprint for 70% capacity, saving 20% for overhead (email, Slack, unrelated meetings, etc.) and 10% for interruptions. For Sprint One, I want you to commit to no more than 60% capacity and no interruptions. Make sure that the team can finish everything committed for the Sprint. If you finish early, pull in a few tasks from the backlog. Chapter 8 covers how to calculate initial capacity in terms of story points.
* Practice canonical Scrum or Kanban - you need to experience all of the aspects of these methodologies (daily standups, deferred assignments of tasks/stories, reviews, retrospectives in the case of Scrum, flow, WIP limits, process policies in the case of Kanban). Although reviews and retrospectives are not part of Kanban, do them.
* Measure your velocity (Scrum) or cycle time (Kanban). Also measure any impact to business outcomes.
* Hold your first Review with the business units and Retrospective. Publish a Retrospective report (page 91-92).
* Celebrate the progress you’ve made in a public way
* Hold your second leadership council meeting – Celebrate what went well, talk about what didn’t go well and your plan to adjust, and bring up specific blocking issues and get leadership’s commitment to unblocking these issues.

**Sprint Two (weeks 5 and 6)**

*Theme: Adjusting and iterating based on your retrospective (continuous improvement)*

* Commit to 65% capacity, at most 1 interruption per week
* Decide how you’re going to handle interruptions/rush projects
* Continue to practice canonical Scrum/Kanban, but adjust by doing it even more like it’s “supposed” to be done, adding/adjusting Process Policies, discussing SLAs, figuring out where your bottlenecks are in your Kanban board and fixing these bottlenecks. If getting approvals in a timely manner are a bottleneck, work hard to address this problem this week.
* Make sure you hold a Review and a Retrospective. Publish your second retrospective report.
* Hold your third leadership council meeting. Same format as your previous leadership council meeting.

**Sprint Three (weeks 7 and 8)**

*Theme: Executing at full capacity, continuing to adjust and iterate*

* Based on the previous two “Sprints”, decide how much capacity you really have and what you can commit to. Put together formal policies for handling interruptions. You can now make minor adjustments to Scrum/Kanban if you feel it necessary
* Focus on outcomes, not outputs. How are you impacting business outcomes?
* Adjust and iterate based on your previous Sprint’s Review and Retrospective
* Hold a Review and Retrospective for this Sprint
* Hold your fourth leadership council meetings

**Sprint Four (week 9)**

*Theme: Increasing your metabolism*  
You’re moving to one-week Sprints if you practice Scrum. If Kanban, your focus is on improving your cycle times and lead times.

* If you are a team that can practice validated learning (and all cross-functional teams should be), start to figure out how you’re going to run experiments (Chapter 11). Run one or two tests this week.
* If you didn’t build a marketing model canvas in Sprint Zero, build one now. Decide which aspects of your canvas are assumptions that need testing or where change could have the greatest impact.
* You should by now be moving away from a campaign-based approach to one of continuous improvement.
* Hold a Review and Retrospective for this Sprint. No leadership council meeting this week.

**Sprint Five (week 10)**

*Theme: Increasing your metabolism and diving deep on validated learning*

* Does moving to one-week Sprints or increasing your cycle time require adjustments to how you practice Scrum or Kanban? From Sprint Four’s Retrospective, make adjustments.
* Increase the number of experiments per week that you’re running. If you ran 1 last week, run 2 this week. If you ran 2, run 4 this week.
* Hold a Review and Retrospective for this Sprint.
* Hold your fifth leadership council meeting.

**Sprint Six (week 11)**

*Theme: Adjusting to change*

* How has what you’ve done so far helped you adjust to change? What specific processes do you need to put in place in addition to Scrum/Kanban to help you adjust to change? Check out chapter 12 of my book.
* Continue to increase your metabolism and if you're ready, increase the number of tests you run this week. If you're not ready, don't worry. Set yourself goals for increasing the number of tests in future weeks.
* Hold a Review and Retrospective for this Sprint. No leadership council meeting this week.

**Sprint 7 (week 12)**

*Theme: Customer focus*   
How has everything that you’ve done in weeks 1 to 11 helped you achieve a better customer focus? What do you still need to change?

* If you didn’t create them in Sprint Zero, create personas for your top 2-3 buyers/influencers (Chapter 17).
* Create a first draft of a customer journey (Chapter 17).
* Do a content audit for each of the personas you’ve created for each stage in their customer journey. Do you have enough content? Do you have the right content? Which content is the most effective?
* Begin to think about how you’re going to make this sustainable. Do you need to move back to two-week Sprints or reduce expectations for cycle time/lead time for Kanban?

**QBR (week 13)**

*Theme: Review of your first twelve weeks and planning for the next twelve weeks*

Hold a quarterly business review (QBR) or as it’s sometimes known, a Big Room Planning Session, over two days. Review what went well and what needs work from your first 12 weeks, and plan out the next quarter.