A whitepaper from Cella



Making Agile Work for In-House Agencies

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Executive Summary

Adopting the Agile methodology is a priority for many marketing organizations. However, due to the challenges and complexity that a wholesale Agile adoption would entail, many in-house agencies (IHAs) are missing out on the significant benefits that Agile can produce. Finding it cumbersome to deal with the methodology's inflexibility, they need a hybrid solution that marries features of Agile with aspects of process-lean systems that adapt to their organizations. Some IHAs, marketing departments and creative teams opt for combining features of the Agile Scrum framework, Kanban methodology and Waterfall procedures most suited to their projects and operating environment. This whitepaper explores the prevalence of those choices as applied to different types of IHA work and project complexity, along with specific roles required for the methodology. The paper also discusses the most common reasons why Agile approaches succeed and fail, along with available resources and ways to ensure success and avoid disappointment – starting with the rollout (phased is best) and continuing with ongoing training and leadership support.

Equally important to how well the methodology is rolled out, accepted by users and championed by management, is the fundamental nature of the methodology itself. Some forward-thinking in-house agencies are leaning towards a new, hybrid approach. In this approach, protocols can be customized for an individual organization's specific project types, levels of complexity, workflows and more. The goal is to supercharge workflows while giving teams the autonomy and ownership to create their best customer-centric work.

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A New Vision of Agile For Marketing and Creative Teams

Today, adopting Agile methods within in-house agencies (IHAs) is a priority for many marketing and creative teams, given its promise to: improve productivity; boost innovation; support changing priorities; better align deliverables with business objectives; and speed products to market. An Agile approach can also deliver projects that better address the customer's needs and interests – the ultimate goal of customer centricity.

However, many in-house agency teams find it challenging and cumbersome to engage in a wholesale adoption of the formal rituals and talent dedication required by Agile's most popular framework, Scrum. (Other frameworks and methodologies commonly used by agencies include Kanban and the traditional Waterfall approach.)

IHA teams need a new vision of Agile – an approach that delivers Agile's promised benefits, but in a way that is process lean and adaptable to the team's specific activities, project types and shared resources. Ideally, this new vision would interpret Agile not as a single inflexible system, but instead as an inclusive and customizable delivery model. This is the concept behind Agile Application. Through this new lens, IHA teams are liberated to adapt elements from Agile Scrum or Kanban or traditional Waterfall into hybrid approaches for managing their projects.

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The objective of any in-house agency should be to establish an approach to processes (including, in some cases, the removal of a formal process) that enables the team to deliver the most valuable output to the business. To choose the best approach, teams should have a broad and deep understanding of these formal methodologies and know the benefits offered by each one. Then the teams can adopt elements to suit their business environment. Consulting with a project management process expert is an ideal place to start your Agile journey and to empower your team to become Agile adopters.

How Other IHA Teams Are Using Agile – Scrum Vs. Kanban

There are two commonly used forms of Agile known as Scrum and Kanban, along with many other lesser-known varieties. How to apply the right Agile approach to marketing and creative development is not a straight lift-and-shift for IHAs.

Most Agile marketing teams don't confine themselves to a single methodology. Instead, teams co-opt and adapt various approaches to suit their particular type of projects or project complexity, often including aspects of traditional Waterfall methodology.

The three most common practices being used by Agile marketing teams are user stories (51%), frequent releases (47%) and retrospectives (43%). This mixed-use combination indicates a common trend: most Agile marketing teams don't confine themselves to a single methodology, 44% saying that they use a hybrid methodology.[1]

86% of teams have been using Agile for under two years. It's plain to see that a lot of recent experimentation is occurring and, as of now, no one best practice has emerged.[3]

2020 In-House Creative Industry Report Highlights[2]

26% of responding IHAs use Agile.

- 28% manage less than 30% of their work with Agile
- 58% use Scrum
- 44% use Kanban
- 37% use a hybrid approach

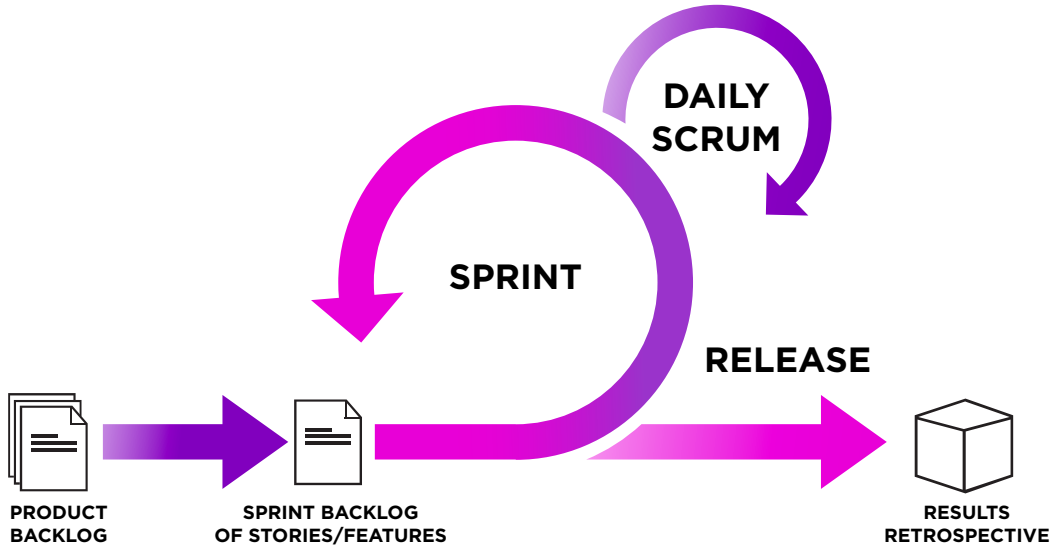
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Scrum

Marketing departments are finding success by applying the Agile Scrum framework to manage marketing planning, marketing automation and multi-channel campaigns. In these cases, cross-functional teams rapidly incorporate feedback and insights to continually optimize their output. Of course, when web, mobile and application development are the focus, teams use Scrum as the framework for managing large and complex technical projects, as well.

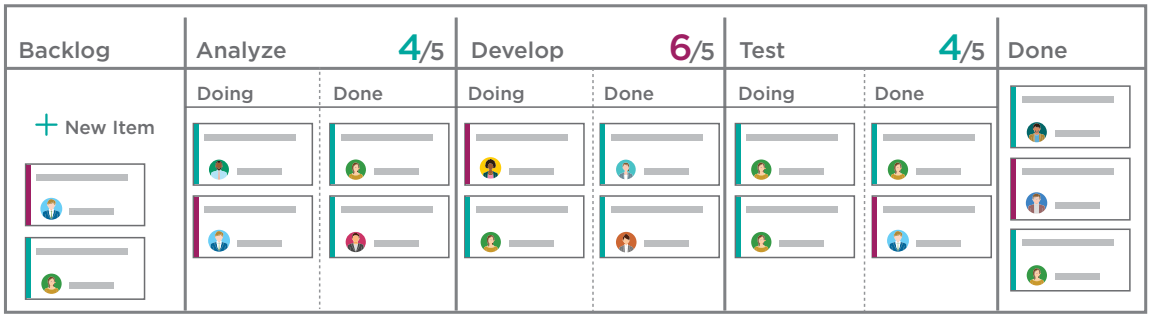
Typical Scrum Project Cycle illustrating releases of project features or stories



Kanban

Some teams use an Agile Kanban approach to manage high-volume requests for production of pre-determined, templated materials and updates to website content. This method enables team members to continuously self-select the next task or project to work on. After finishing one component, they pick the next prioritized listing on the Kanban Backlog board.

Typical Kanban Board showing the Backlog of prioritized projects and production phases



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Scrum vs. Kanban Characteristics

Framework	Scrum	Kanban
Defining characteristic	Teams work in a series of Sprints with 1-or 2-week durations	Kanban is a continuous process
Works best when	Project team is dedicated to the project for an extended period of time. Work product and deliverables are defined during the course of the project. Product Owner accepts risk of project duration and multiple iterations	Frequent changes in priorities are expected. Tasks are well defined and repetitive (i.e., template driven)
Works best for	Large, Tier 1, strategic and conceptual projects such as campaigns, new experiences and large web builds that lack full definition at kickoff	Fully defined, fast turnaround Tier 3 projects such as updates to existing deliverables, resizing and content edits
Governance roles	Scrum Master's job is to guide the team to maintain best practices	At times an Agile Coach may serve the same function as the Scrum Master, but usually the activity is self-directed by individual team members
Common IHA team roles	Product Managers, Marketers, Researchers, Data Scientists, Architects, Creative Strategists, Designers, Writers, Developers	Producers, Videographers, Designers, Copywriters, Coders, Editors, Proofreaders, QC Specialists
Ideal team size	3–9 working members	1–9 working members

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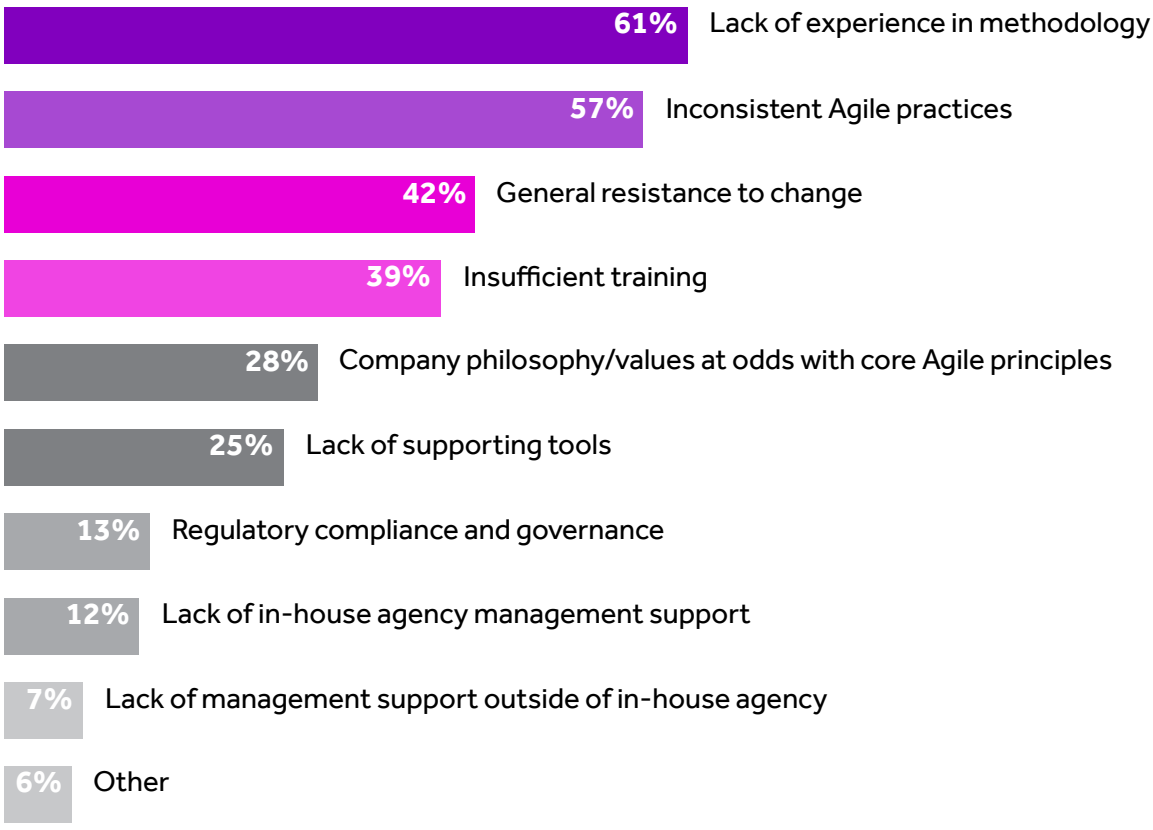
The Siren Call and Pitfalls of Agile For Creative Teams

Transforming the way people work and think in an effort to become more Agile has been challenging to many teams for at least four key reasons:

- Lack of in-house expertise and inconsistent Agile practices
- General resistance to change both within the IHA and partner/stakeholder groups
- Insufficient training and ongoing coaching
- Lack of supporting tools

Bringing most benefits of Agile to life in your in-house agency is possible. But knowing where the demons lurk along your quest will help you prepare for success.

In-House Agencies Report Biggest Challenges Using Agile Methodologies[2]



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How You Can Succeed Where Others Have Not

Agile Expertise

Agile methodology involves approaches to problem solving, team organization and ceremonies (Sprint planning, daily Scrum meetings, Sprint review and retrospective) that work together to deliver the benefits that agencies have all heard about. But in order to learn, adopt and thrive using the Agile methodology, IHAs need a customized framework and one or more expert coaches to help guide their teams' path to success. Experienced process and change management consultants can help assure successful rollouts by:

- Creating a customized hybrid Agile methodology or procedures
- Specifying tools and the best practices for implementing them
- Providing teams with guidance on how best to manage their Agile transformation and provide practical training.

A Custom Approach to Agile Works Best for In-House Agencies

Corporate executives may call for their teams to become more "Agile," often using the word as a placeholder to request that teams be nimble, responsive, fast, collaborative, experimental, customer centric and a host of other descriptors. Leadership, marketing and project management may all have different definitions of what Agile is and how this methodology may apply to the work in practical terms. To date, there is no codified, best-practice approach to Agile for in-house agencies. Agile methodologies that started out deeply rooted in one area, software development, must now be applied to the unique work mix of an in-house agency. Projects may include, but not be limited to, marketing and communications campaigns, content, programs, events, experiences and other deliverables that fall outside of, or go broader than, app development alone. This disparity often results in frustration, unrealized potential and abandonment of new project management approaches. It's the square peg, round hole conundrum.

Agile Practices

Teams may first try to adopt the formal Agile Scrum ceremonies and iterative cycles for most agency activities. They might learn that this approach is suitable (only in modified forms) for a certain percentage of projects – typically the more strategic, complex or conceptual initiatives. For the more tactical projects that often comprise a significant portion of IHA work, teams may adopt only some of the Agile practices, such as the daily stand-ups (i.e., team meetings). To manage the rest of their projects, the teams may revert to their previous Waterfall processes. Such a limited application of Agile leaves a whole spectrum of potentially valuable practices untried by IHA teams. Often the teams will describe the Agile methodology as failing or faulty, when instead the cause is inconsistent or inappropriate adoption or adaptation of new practices.

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Training and Ongoing Support

Two common challenges that may impact a thorough Agile adoption: a lack of knowledge and experience about Agile approaches (61%); and training (39%).[2] Managers need to establish a formal training/mentoring program for the Agile rollout and for new hires. In addition, management should then evolve the process and training program through periodic retrospectives of the teams' work experiences.

Agile methods rely heavily on evenly-weighted collaboration by team members, plus the product owner's consistent and present involvement in the team's activities. Everyone on the team should be trained using the same vision, guidelines and rigor. Otherwise, the individuals' productivity, efficiency, work quality and joyful satisfaction with their work experience will all suffer. When inadequate training persists, teams tend to abandon the new method before they have realized its full value and potential.

Use of Supporting Tools

Agile teams benefit from using shared tools that make it easy for them to manage their process and support communications. These tools can be as simple as a dedicated Kanban whiteboard in a common area, or as sophisticated as project management software integrated with all team and enterprise functions. The key is for management to give teams the most robust but appropriate tools to enable them to share project information and communicate fluidly. These tools are not nice-to-haves, but essential to enabling the Agile adoption, processes and ongoing compliance with the established procedures. The ideal software systems are built specifically to support Agile processes. Workfront, Wrike, Monday, Mavenlink, Asana and JIRA are some popular tools being used to manage IHA Agile projects.

Take the time and do the research to ensure you select the right tool for your business, culture and process.

Aligning Cost Expectations with Internal Clients and Partners

In-House Agencies are funded and resourced through a wide variety of funding and cost models. Some are required to recover 100% of their IHA costs by billing their services to internal clients. Other groups are fully covered by the corporate marketing budget. Allocation models also exist, as do hybrids and variations of all three. It is important to consider how the shift to Agile may impact the cost incurred by internal clients and businesses and how these changes may align (or not) with the IHA's pre-existing financial operations. Agile may enable the development of consistently higher-value deliverables and drive greater marketing ROI long-term, but this may also come with a higher project cost up front. Conversely, the flexibility that Agile methods offer (Kanban specifically) have often led to reduced level of effort and cost savings in Tier 2 and 3 categories of work as the extra time associated with scope changes and review rounds are reduced. Teams

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funded by internal chargeback models are especially impacted by the shift to Agile, as the internal clients of these groups are often more sensitive to resource charges. As Agile may require a new approach to meeting cadence and team/resource assignments, there is the potential that it may change the make-up of the "bill" to the internal client. These cost implications are critical to consider when evaluating the team's readiness to shift to Agile. Alignment between IHA and client/business on the cost of Agile resources, and how that cost will be accounted for, should be established at the onset.

Support for the Change

When executives fail to communicate their support and value for moving to Agile methods, or when department leads are not present in Agile project activities (walking-the-walk), their direct reports may infer that the initiative is not important or critical to the success of the business. As fallout from this assumption, teams may not fully adopt Agile, setting the stage for failure. By actively supporting and participating in Agile practices, leadership will help ensure that teams fully commit.

Never underestimate how effective a few vocal or influential team members can be in undermining the group's spirit and commitment to adopt Agile. It is critical to identify these individuals early in the change process and help them to understand how Agile can benefit them personally and the team in general – and in doing so, turn their attitudes around.

Getting The Agile Rollout Right

Phased Rollout Is Best

Consider approaching your rollout of Agile in phases. Generate short-term wins by piloting your new Agile Application with single groups and specific projects or project types. The pilot team should be led by an Agile expert. Once the pilot is complete and your team feels that your applied approach is optimal and documented, this team should then mentor other teams to adopt Agile for subsequent phased rollouts.

Take an Agile approach to your rollout. Have a dedicated team, plan, prioritize, sprint and review.

Agile Governance

Your Agile approach will be new and very different from the way most people are accustomed to working. Engaging a professional trainer and change management expert (agent) can be the best way to ensure consistent and high-value training for your team. Once a core team is trained, the newly converted champions on your team can continue to teach other people in your company and sustain the Agile transformation. Teams should consider establishing an Agile Governance Committee (AGC), which could be a subgroup within your Project Management Office (PMO) or marketing team. Combining a few key project, account and marketing department managers, the AGC would be responsible for formalizing and regularly optimizing Agile processes and all training documentation. This step would help assure that all current and future Agile team members will understand the processes in the same way and practice them consistently at the same degree of proficiency. The AGC would also be the advocates and change agents for Agile across the enterprise.

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A New Mindset – Applying Agile To Creative

Cella is pioneering a new vision for the ways in which in-house agencies get great work done. Our hybrid process framework for IHAs, incorporating the right application of Agile, Lean, Waterfall and other methods, supercharges workflows while giving teams the autonomy and ownership to create their best customer-centric work. As experts in creative process, project management, IHA financial operations and workflow technology, we give in-house agencies the wings to create smarter, collaborate better and deliver projects sooner. Cella's approach begins with understanding and mapping your unique business environment, current-state workflows and overall readiness for change within your IHA. Let's get started! Contact Cella to find out how we can empower your team though your Agile journey.

A customized, hybrid approach to an Agile solution works best for IHAs.

Summary

Elements of A Successful Agile Adoption

When considering adopting Agile for your in-house agency, remember there are five key factors to help you position your team for a successful rollout:

- Hire, or appoint from within, an expert Change Manager to architect and lead your rollout.
- Engage process experts experienced in both formal Agile methodologies and traditional in-house agency workflows to design and codify your team's approach, to lead training, to iterate and optimize your program over time and to manage continued adoption and compliance.
- Apply the most appropriate process methods to best manage your projects, from the simplest to the most complex.
- Adopt approaches to using Agile that are realistic and recognize your team's availability to dedicate themselves to single projects for certain periods of time.
- Provide the team with the best project management software and associated training and support to help them manage processes and communication.

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Prepare To Overcome Key Barriers To Adopting Agile

One or more of the following conditions can cause your rollout to fail. Remember to create an action plan to address each one of these factors that pose critical risks to your rollout.

- High Priority: Lack of training or knowledge about Agile approaches (Answer: Expert Agile training and governance best practices).
- High Priority: Resistance to change by those who believe things are working well enough (Answer: Apply change management best practices).
- No active involvement or just spoken support from management or C-suite.
- People who decline to get involved stating that they have no time to try something new.
- Don't have the right project management tools to support Agile.

Your Next Steps to Adopting Agile

If you are considering Agile for your team, or any changes in your in-house agency, please contact Cella to answer your questions and find the resources to assure your optimal success.

Sources

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3. *Andrea Fryear, "Agile Marketing Journey Continues: State of Agile Marketing 2018", AgileSherpas and Kapost, 2018. www.agilesherpas.com/state-agile-marketing-2018*

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