

# SAFe® for Marketing

A Scaled Agile, Inc. White Paper  
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# Introduction to Agile Marketing

Enterprises around the world struggle to keep up with the relentless pace of change. Software and product development organizations have adopted Agile frameworks such as SAFe® to help them address these challenges and improve time-to-market, productivity, and quality.<sup>1</sup> These improvements have created the desire for enterprises to continue their improvement efforts and adopt agile practices across all aspects of the business, with the goal of moving from 'development agility' to "business agility." Enterprises that make this next transition successfully will thrive in the digital age.

But many marketing organizations have yet to broadly adopt Agile frameworks, and continue to be bogged down with alignment issues, inefficiencies, and slow reaction times. The typical product marketing campaign takes months to get to market, contributing to an estimated \$958 million in waste in B2B marketing organizations on an annual basis.<sup>2</sup> To fully realize the benefits of business agility, marketing organizations must also adopt Agile.

SAFe 5.0 is the leading framework for scaling Agile practices. Based on seven competencies required by the Lean-Agile enterprise to realize business agility, SAFe is uniquely suited to align marketing organizations and support them as they undertake their own transformations to greater business agility.

Team and technical agility, one of the core competencies, guides enterprises to create small, cross-functional teams that serve as a cornerstone for business agility. This model of working is being rapidly adopted by many marketing teams. The results are compelling: according to the second annual State of Agile Marketing report, 53% of marketers who adopted Agile team practices improved their ability to respond to change and 36% saw faster time to release. Fifty percent of traditional marketers plan to adopt Agile within a year.<sup>3</sup>

The goal of this white paper is to provide insights on what is driving the adoption of agility in marketing organizations and show how marketing teams can benefit from adopting team and technical agility, along with Agile skills of built-in quality and customer centricity. Marketers will also learn how to effectively join SAFe implementations.

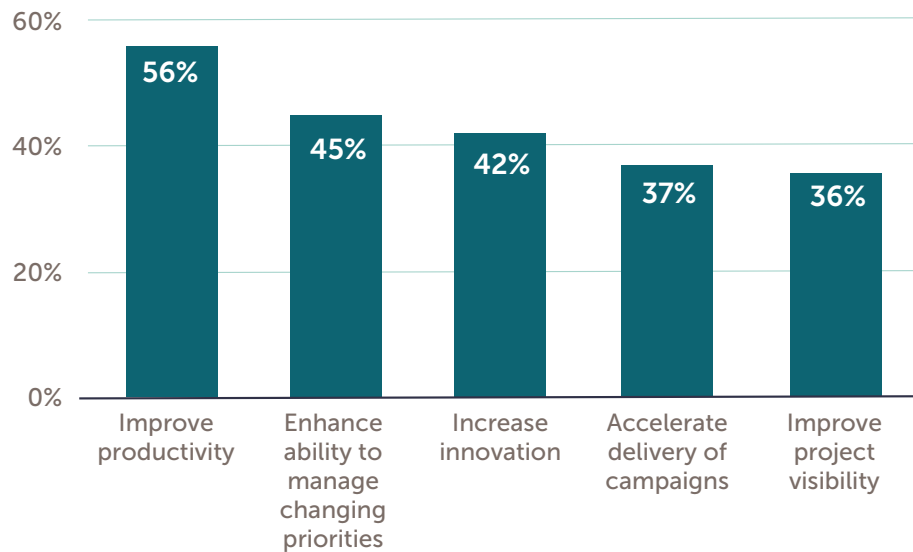
## What is driving adoption of Agile?

As product development organizations adopt SAFe, they create new demands on their marketing partners. These demands motivate marketing to better align with changing priorities (a core value of all Agile methods), increase innovation, and deliver campaigns at a pace that matches product development and resonates with the customer. This desire to keep up with change at a rate that doesn't burn out employees is driving marketers to search for better alternatives to their current structure (Figure 1).

1 <https://www.scaledagile.com/customer-stories/>

2 [http://resources.kapost.com/rs/kapoststd/images/\\$958m-marketing-problem-quantifying-the-cost-of-inefficiency-in-your-content-production-processes.pdf](http://resources.kapost.com/rs/kapoststd/images/$958m-marketing-problem-quantifying-the-cost-of-inefficiency-in-your-content-production-processes.pdf)

3 <https://chiefmartec.com/2019/03/say-agile-marketing-doesnt-work-practices-talking/>



Source: Second Annual State of Agile Marketing Report – 2019

Figure 1. Why marketing teams adopt Agile practices

Delivering value more frequently is just one part of the equation. How that value is delivered must be managed. Agile marketing improves project visibility and allows more transparency within the organization, leading to improved productivity. With marketing positions touching software systems and development in an increasingly direct way, aligning the marketing and product development team in the same set of work practices provides substantial benefits.

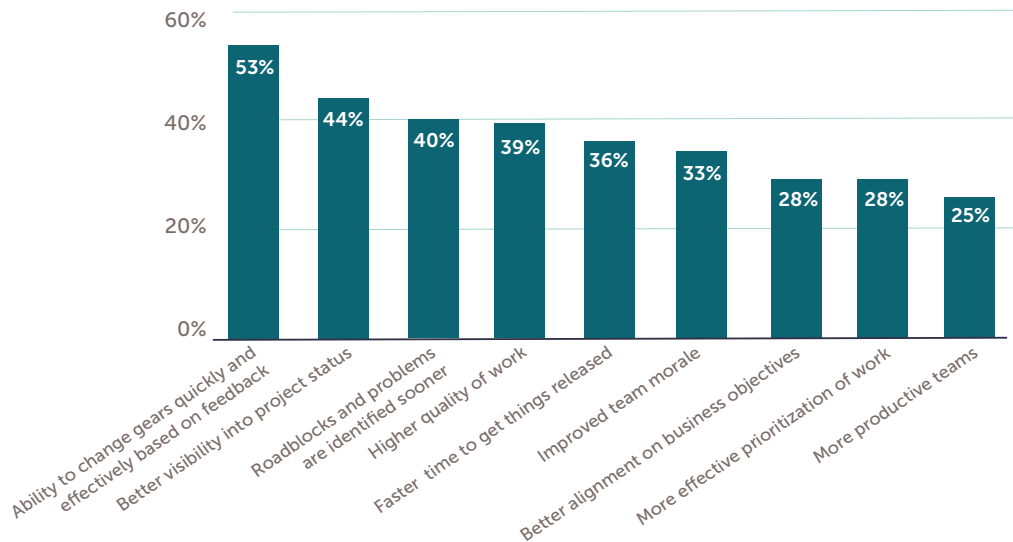
## What are the benefits of SAFe for marketing teams?

In a traditional marketing team, campaigns often have long lead times and waterfall-like scheduling, with multi-faceted campaigns planned out in detail months in advance. There are often dozens of dependencies between teams. Responding to change mid-campaign results in substantial rework, causing delays throughout the system.

SAFe for marketing teams takes an iterative and test-driven approach to campaigns. Instead of planning large and complex campaigns with large amounts of uncertainty and risk, this approach breaks down large campaigns into smaller, incremental campaigns that can be tested in order to maximize learning and improve performance. These smaller, iterative campaigns provide validated learning that informs future actions.

Integrating marketing into SAFe implementations provides better visibility between IT and marketing, between marketing teams and across the entire organization. Marketing gets earlier insights into the evolution, delay, or cancellation of product features that impacts everything from campaign planning to website copy. Issues can be escalated quickly and resolved, which eliminates wait times, rework, and other types of system waste.

As a result, Agile marketing teams benefit from faster time to release, higher quality, shorter review cycles, better alignment, and improved team morale (Figure 2).

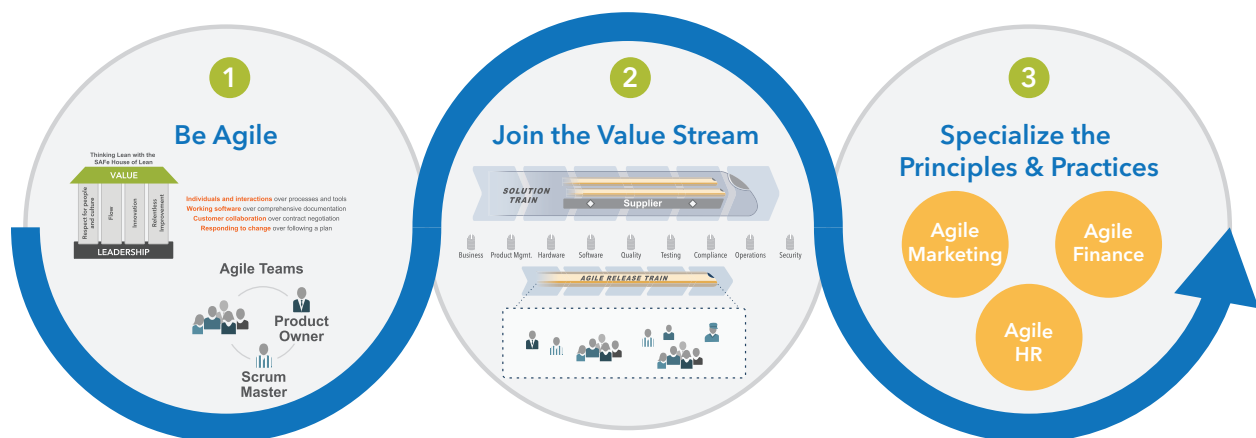


Source: State of Agile Marketing 2019 | AgileSherpas and CoSchedule

Figure 2. Benefits of Agile marketing

## Agile Business Maturity Cycle

SAFe describes a typical three-step maturity cycle to help marketing and other business teams form, advance their processes and climb on board with the rest of the organization. (Figure 3).



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Figure 3. Agile Business team maturity cycle

First, the teams adopt and master the basic Agile mindset and practices. The Agile Manifesto's value system and many of the principles apply to their work. It's the baseline for their interaction with other agile teams. This creates a universal value system and a shared understanding of what Agile is and means. But it goes beyond that. The SAFe House of Lean and the SAFe Lean-Agile principles are equally relevant, and in some cases even more so, ensuring the right mindset for the teams and their leaders.

As teams optimize and improve their team-level efficiencies locally, the larger, end-to-end system may suffer. How that works in practice depends on the scope and the nature of the work the teams do. Teams like product marketing may be directly embedded into a value-oriented Agile Release Train (ART) – a long lived team-of-teams which, along with other stakeholders, incrementally develops, delivers, and operates one or more solutions in a value stream. In other cases, the marketing functions, for example, may operate as a separate train and deliver shared services via coordinated backlogs to the other trains. But the common view of work, a common taxonomy, and shared cadence and synchronization points help the organization and its value stream deliver quickly and predictably with better quality.

Steps one and two will propel the enterprise, including marketing, further on its way to true Business Agility. However, a final step remains. Over time, it becomes increasingly important that the business teams evolve their own specialization of Lean and Agile principles and practices, as well as implementing what Built-in quality means in their context. In this way, they 'make Agile their own'.

Many business functions have processes that were established in a pre-Agile era that often conflict with small batches, fast flow, and adjusting. By being more closely connected with the development organization, they evolve these processes and find ways to integrate them into the teams' and ARTs' flow of value delivery and better serve the entire organization.

The remainder of this white paper explores how the Agile Business Team maturity cycle applies to building an Agile marketing organization.



# Be Agile

## Mastering the Lean-Agile Mindset

In SAFe, a 'Lean-Agile Mindset' serves as a foundation upon which other Agile practices and principles and practices sit. Many marketing organizations make the mistake of diving straight into the practices of SAFe and Agile, adopting events such as daily stand-ups, retrospectives, and visualization tools such as Kanban without first aligning around the mindset. The Lean-Agile mindset is the combination of beliefs, assumptions, attitudes, and actions for adopting and applying SAFe principles and practices.<sup>4</sup>

The Lean-Agile mindset moves marketing teams from up-front, long-range planning to iterative experimentation in order to deliver the highest quality value to the customer in the shortest lead time. This new mindset seeks to align work with overarching goals, minimize waste, and embrace relentless improvement.

A key tenant of the Lean-Agile mindset is staying open to change. With change happening at an unprecedented rate, the ability to spot and see opportunity in the midst of change separates the winners from the losers. This requires an open mindset, often called a growth mindset. This is contrasted with a fixed mindset, or one that is more centered on the status quo.<sup>5</sup>

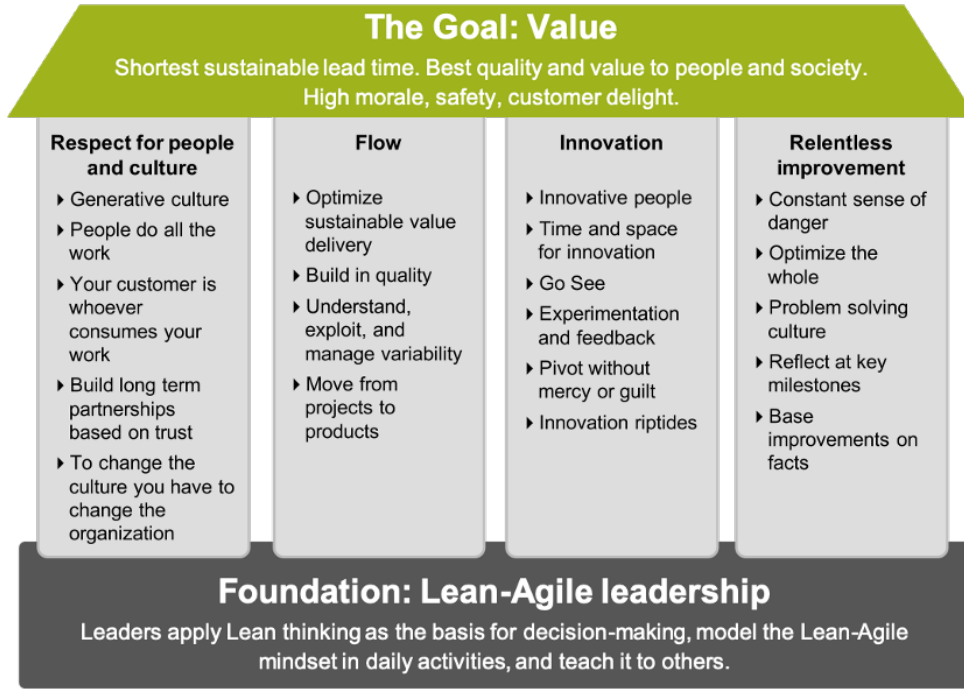
Marketing leadership within the organization must exemplify this open, Lean-Agile mindset in order for change to take root. It is up to the leaders to embody this change. Simply telling teams to "go Agile," is not enough. Leaders must lead and be role models for the change. They must demonstrate a set of characteristics including transparency, listening to a diverse set of opinions, maintaining a high sense of personal accountability and an open mindset. Doing so sets a foundation of trust and shows (not tells) the teams what this new way of working is all about.

## Thinking Lean

The SAFe House of Lean captures the principles and practices of Lean. Initially derived from Lean manufacturing, the House of Lean applies to all aspects of the business, including marketing. It focuses on delivering the most value in the shortest sustainable lead time, with the best quality and value to people and society.

<sup>4</sup> <https://www.scaledagileframework.com/lean-agile-mindset/>

<sup>5</sup> <https://www.scaledagileframework.com/lean-agile-mindset/>



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Figure 4. The SAFe House of Lean

The Goal–Value in the shortest sustainable lead time is clear. The pillars of Respect for People and Culture, Flow, Innovation, and Relentless improvement applies as readily to marketing as it does to manufacturing or product development. Thinking Lean fundamentally shifts marketing teams from an orientation around tasks and projects to a customer-centric orientation around value, quality, flow and innovation. Marketers are encouraged to ‘Go See,’ experiencing the customer first-hand, rather than knowing the customer only in theory. A focus on relentless improvement and flow allows marketing teams with a Lean-Agile mindset to break through approvals bottlenecks and eliminate wait states in workflows.

Campaigns move from “big-bang” campaigns where results are delivered all at once and measured after-the-fact, to ‘hypothesis-driven’ campaigns where progress is delivered and measured incrementally.

Management moves from being the arbiter of ‘right’ to serving and enabling the team. This requires a shift from top-down thinking, where the manager’s role is to approve and direct to a place where the manager’s role is to facilitate and optimize team performance, focusing on how the team can better innovate, improve, and flow together.

## Embracing Agility

SAFe bases its mindset, principles, and practices on those found in Agile software development. Agile found its footing in 2001, when a group of individuals gathered to determine what successful

software development initiatives had in common. The output of their session was the Agile Manifesto, which codified these success patterns into a set of values and principles. The Agile Manifesto states:

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- **Individuals and interactions** over processes and tools
- **Working software** over comprehensive documentation
- **Customer collaboration** over contract negotiation
- **Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

It's probably not an overstatement to say that this simple document revolutionized software development. And while it was developed for software environments, more and more marketers have been applying it to their work, applying the values and substituting phrases such as "effective campaigns" for "working software."

## An Agile Marketing Manifesto?

The Agile Marketing Manifesto is one attempt at putting the Agile Manifesto into marketing terms. It provides a useful framing that can help marketing organizations understand how Agile values can be applied in a marketing context:

We are discovering better ways of creating value for our customers and for our organizations through new approaches to marketing. Through this work, we have come to value:

- **Validated learning** over opinions and conventions
- **Customer focused collaboration** over silos and hierarchy
- **Adaptive and iterative campaigns** over Big-Bang campaigns
- **The process of customer discovery** over static prediction
- **Flexible** vs. rigid planning
- **Responding to change** over following a plan
- **Many small experiments** over a few large bets

Much like the Agile Manifesto, the Agile Marketing Manifesto values responding to change, collaboration, and the incremental over the big batch.

## Agile Team Basics

It all starts with Agile teams. When organizations are small, alignment and flow tend to come naturally. Information flows freely, trouble spots are easily identified, and alignment is easily achieved.

As organizations get larger and more hierarchical, channels of communication get convoluted, cross-functional collaboration opportunities become more difficult, and entropy continually challenges alignment. SAFe roles and events support the growth of individual Agile marketing that reinvigorate the natural flow and alignment of a smaller organization.

## Building an Agile Marketing Team

The building block for Agile is the Agile team, a cross-functional group of 5-11 individuals that has all of the skills necessary to take an increment of value from start to finish. The Agile team member, along with his or her colleagues on the team, decides how the work gets done, maintains collective ownership of the work and is empowered to deliver value in short iterations. An increment of value in marketing could be anything from an email to a campaign to an event to results of market research. The team has the authority and accountability to manage their own work, supported by two specialty roles:

The **Scrum Master** is a servant leader and coach for the team, reinforcing the agreed-to Agile processes, removing impediments, and enabling an environment where a high-performing team can relentlessly improve.

The **Product Owner** works with the team to define stories, ensures they align with program priorities, and maintains integrity and alignment with Features.

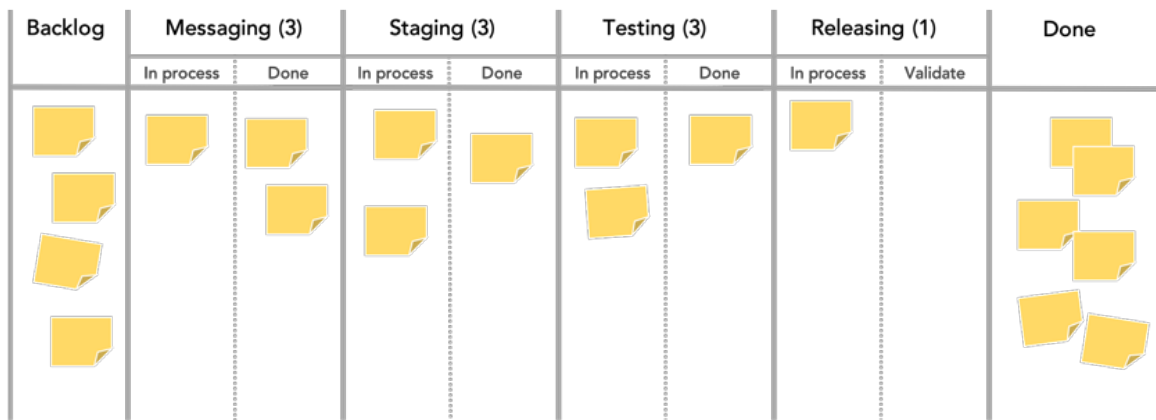
Most Agile marketing teams use a blend of Agile methods including Scrum, Kanban, and hybrid methodologies to visualize, prioritize, and communicate their work.

Scrum serves Agile marketing teams in that it uses short iterations, usually two-weeks long, to break work down into smaller batches of work (user stories) that can be completed in this timeframe. The scaled Scrum elements in SAFe helps to keep multiple teams on the same cadence, which can be helpful in aligning work across teams. In addition to iterations and user stories, Scrum practices include:

- Using a team backlog to visualize and prioritize work
- Team-based planning of the work for each iteration
- Having a Daily Stand-up (DSU) to exchange information about the work
- Demonstrating completed work at the end of each iteration
- At the end of each iteration, discussing how the team can improve

Kanban, another Agile method, helps marketers visualize workflow and manage their work in progress (WIP). Kanban boards help teams identify bottlenecks by visualizing how long any given story has been in any given state. Numbers at the top of the Kanban board indicate the WIP-limit, or how many stories can be in any given state at a given time in order to maintain flow.

Figure 5 illustrates a simplified Kanban system for a set of marketing campaigns associated with a campaign for a new product launch. Each 'campaign,' represented by a single card in the system, works its way through the system from the backlog to done. Kanban systems limit work to the actual capacity of the system and exposes bottlenecks and problems with flow. WIP limits (in parenthesis next to the Kanban stage) reduce the batch size (number of items being processed) and control the amount of work in the system.



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Figure 5. Kanban board

## Teamness and high performing teams

Great teams require more than talented individuals. Team composition and dynamics play a significant role. In fact, who is on a team has less impact on team performance than how the team works together. High-performing teams share many common characteristics:

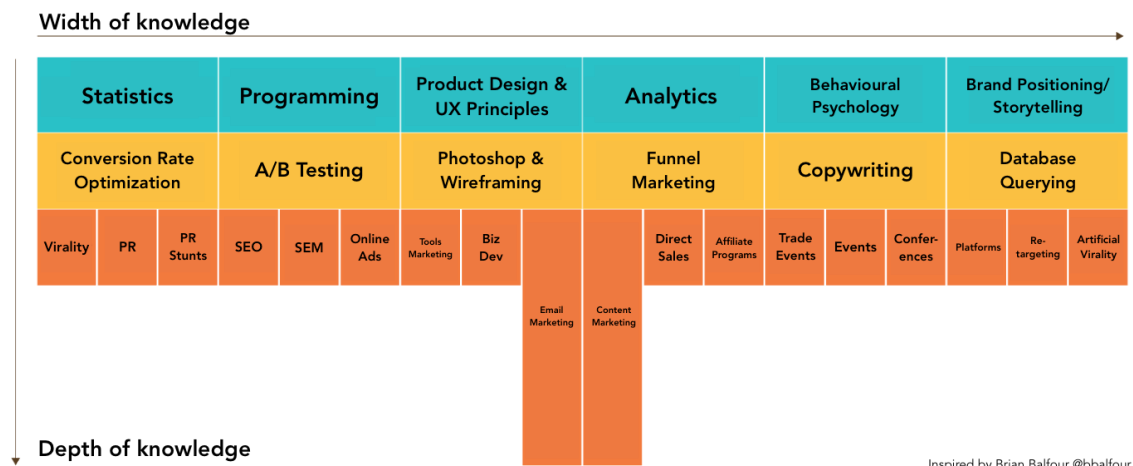
- A safe environment for taking risks without fear of embarrassment or punishment
- Alignment on a shared vision with clear goals and purpose
- Diversity of knowledge and skills to make quick, effective decisions independently
- Mutual trust that allows for healthy conflict
- Accountability to each other and the organization by reliably completing quality work and meeting commitments
- Understanding of their work's broader impact on the organization

## Specialization, 'T Skills', and cross-functional teams

One of the challenges marketing teams face is the deep specializations that some marketers develop. Hiring often emphasizes and rewards specialization (I-shaped skills) over generalized skills (T-shaped skills) (Figure 6). Because of this, some marketers may be reluctant to develop T-shaped

skills. Years of managing a specialized task list owned by an individual lead to user stories that look like task lists rather than a value-oriented story owned by the team. Writing stories geared toward individuals not only robs individuals from building out T-skills, but it simply documents an 'as-is' state, leading to the same issues with hand-offs and wait states. Stories move from individual to individual instead of being swarmed on by the team.

Encouraging the development of T-shaped skills on the team and writing value-oriented user stories helps address this challenge. Individuals can still maintain an area of specialization but are encouraged to build out adjacent skills that allow the team to optimize flow, work cross-functionally, and swarm to complete the highest priority work. Agile marketing teams embrace the notion of a 'T-shaped marketer', or one who has both lighter broad skills along with a deeper expertise in a specific area. Building out a T-shaped team enables team members to help others on the team and also solves the issue of bottlenecking around a single I-shaped person.



Inspired by Brian Balfour @bbalfour

Figure 6. T-shaped skills

## Individual vs. collective ownership

The individualism and specialization found in marketing teams can also be a barrier to collective ownership of stories and features. Collective ownership is another Agile principle and mindset shift that marketers need to make when adopting Agile. Marketers may be accustomed to taking ownership for their part of the work, but not the entire work product. For example, a copy editor may be used to spotting grammatical errors in an email but may not take responsibility for reporting a broken link, as she assumes that someone doing QA would find and fix that error. Being on an Agile team with collective ownership means everyone takes responsibility for the work, including completeness and quality. Getting into the mindset of owning the work collectively, rather than as an individual can take a considerable amount of coaching, both for the team members, who may not be used to taking that ownership, and to the leaders, who may be used to looking for one individual, rather than a team, to take responsibility.

# Organizing Around Value

Agile teams are focused on creating, communicating, and supporting the business solutions that deliver value to the enterprise's customers. Being able to create solutions and communicate the value of those solutions in a way that reliably resonates with the customer is a critical success factor for Agile marketing teams.

## Creating cross-functional teams

Agile teams are organized around value. In marketing this might trigger considerations for organizing teams around end to end value such as:

- Attracting customers
- Retaining customers
- Communicating product and service value propositions
- Proving external and internal communications
- Enabling sales and channels
- Providing community support and enablement

However, much like in software and systems development prior to Agile, most marketing organizations are typically organized around function. For example, creative services is a team, demand generation is a team, content creation is a team and so on. However, these siloed skill sets inhibit flow, as value has to transit the silos to reach the customer. Agile marketing teams, however, include everyone needed to deliver value to the customer.

A feature-driven, cross-functional Agile marketing team might include graphic designers, copywriters, and campaign managers.

Because Agile marketing teams can be virtual in nature, there is no requirement to create new reporting structures initially. The objective is to improve flow and delivery, not to reorganize for its own sake. The goal is to create feature teams that teams work toward a common mission and deliver value together.

# Join the Value Stream

## Marketing Joins the Agile Release Train (ART)

The central construct in SAFe organizes multiple teams around value in an Agile Release Train (ART). An ART is a long-lived team of Agile teams, which, along with other stakeholders, (such as marketing) incrementally develops, delivers, and, where applicable, operates one or more solutions in a value stream.<sup>6</sup> Each ART is aligned to a common business or technology mission and is comprised of 50 – 125 people who plan, commit, develop, and deploy together. ARTs are organized around value streams and exist to deliver value to internal or external customers. Like Agile teams, ARTs have all the capabilities needed within the train to deliver value. The ART is often a ready home for those Agile marketing teams directly involved in helping to assure solution success.

## Marketing integrated into the Value Stream

In turn, ARTs are organized around significant enterprise value streams, the steps used to move an idea from concept to cash. SAFe uses operational value streams to show how value is delivered to the customer from identification of the need through to purchase - the delivery of value. Marketers have a similar tool with journey maps. Like operational value streams, journey maps describe how the customer moves through the buying journey from start to finish, incorporating what the customer is thinking and feeling along the way. Value stream thinking allows organizations to maintain a sense of customer centricity and determine how to organize teams around value, rather than organizing around projects.

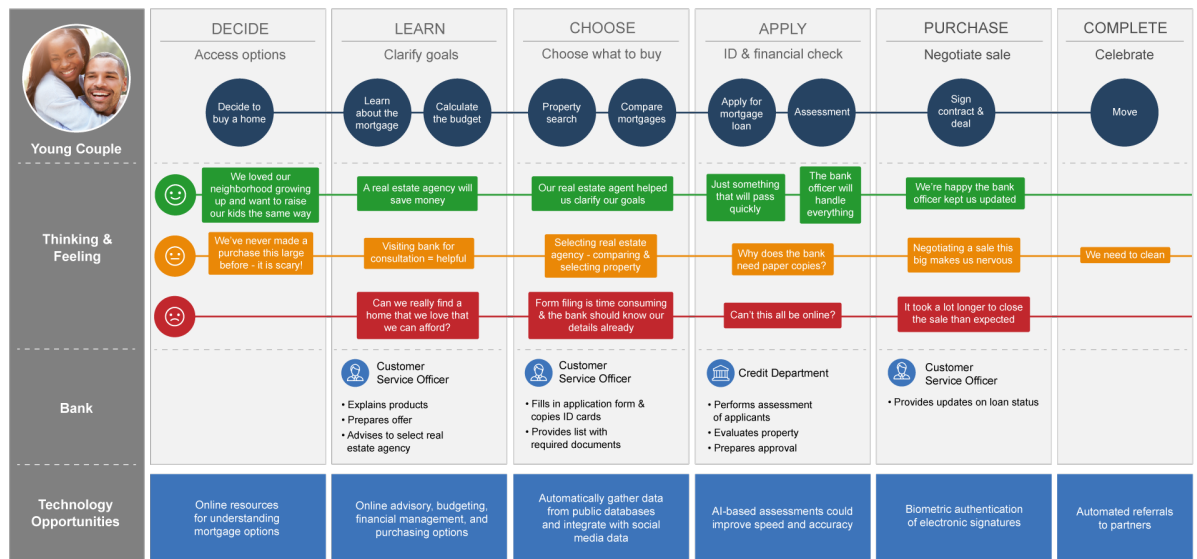
Below, we can see how a SAFe operational value stream corresponds to the customer journey map. Marketers can use tools such as the operational value stream and journey mapping to identify steps that could benefit from marketing involvement. Marketers can then share these insights with other teams, including software and systems development teams, to demonstrate where they can add value and/or where dependencies might exist.

<sup>6</sup> <https://www.scaledagileframework.com/agile-release-train/>





## Customer Journey Mapping (Mortgage Loan)



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Figure 7. Operational Value Stream and Journey Mapping

## Marketing joins the ART

How marketing joins the ART depends on the level of involvement needed from the system. For example, if the mission of the ART is to replace a back-end accounting system, the ART might need a graphic designer to stay on brand and someone to help with internal communications. However, if the mission of the art is to launch the next generation of a mobile phone, the ART would need marketing to be much more involved, perhaps requiring one or more dedicated marketing teams.

SAFe suggests several ways to integrate marketing teams into the ART:

- **Marketing as a shared service to the ART** - used when there are specialty roles, people or services required for the success of the Agile Release train, but that cannot be dedicated full-time. Examples include public relations, market research, demand generation and event marketing
- **Marketing as a stakeholder in key SAFe events** - invite key representatives from marketing to key SAFe events to provide visibility into the development activities, real-time information, and a communication conduit back to other marketing teams. Examples include inviting marketing representatives to PI Planning, System Demo, ART Sync and the Inspect and Adapt Workshop

- **Individuals on Agile teams within the ART** - dedicate one or more marketing representatives to an Agile team to provide needed capabilities and serve as a conduit to and from the rest of the marketing organization
- **Agile marketing team(s) on the ART** - embed an entire marketing team onto the ART in order to deliver marketing value as part of the overall ART
- **Marketing as its own ART** - in a complex, multi-train solution environment, marketing can launch its own art to allow for clear communication and alignment across a broad range of marketing activities and maintain alignment with the overall multiple ART 'Solution Train'

Any combination of the above can be implemented depending on organizational need and the structure of the SAFe implementation.

## Participate in ART events

Regardless of which approach marketing takes to integrate with the ART, marketers would most likely be involved with the standard ART events:

- **PI planning** - a cadence-based planning event that serves as the heartbeat of the ART, aligning all of the teams to the shared mission. Teams identify dependencies, gain alignment, and determine capacity allocation for the program increment (PI) at this event. (see further description below)
- **System demo** - provides an integrated view of new features from the most recent iteration delivered by all the teams in the ART. The System demo can be used by marketing teams to share results of hypothesis-driven tests, receive feedback and demonstrate integration of multi-faceted marketing activities
- **Inspect and adapt** - a significant event where the current state of the solution is demoed and evaluated. Teams then reflect and identify improvement backlog items via a structured problem-solving workshop
- **Scrum of scrums** - helps coordinate the dependencies of the ARTs and provides visibility into progress and impediments. A key ceremony for marketers to better understand what is happening across teams and functions
- **PO sync** - provides visibility into how well the ART is progressing toward meeting the program PI objectives, to discuss problems or opportunities with feature development and to discuss any scope adjustments
- **ART sync** - combines the ART scrum of scrum and PO Sync into one meeting
- **Innovation and planning (IP) iteration** - time for teams to plan for the next program increment and make sure there is time to innovate!

## Bringing It All Together: PI Planning

Program increment planning (PI planning) is a two-day cadence based planning event that serves as the heartbeat of the Agile Release Train, aligning all of the teams on the ART to the shared mission. Whether marketing is just a few representatives on the ART or an ART unto itself, PI planning is a chance for marketers to get aligned with other teams on the train, determine the scope of work for the next PI (a period of 8 - 12 weeks), and jointly commit with the business owners to that plan.

During the first day of PI planning, the business owners present the business context and business objectives for the PI, providing focus for the teams. Prior to the PI, the program backlog of features has been prepared and prioritized to reflect the business objectives. Teams then spend two days building plans of stories to support those features, identify dependencies between teams, and address risks inherent in the plans. PI Planning:

- Builds alignment
- Reinforces cadence and synchronization
- Reinforces social networks
- Identifies dependencies
- Matches capacity to demand
- Results in fast decision-making
- Fosters cross-team collaboration
- Focuses on the prioritization of work

### Special considerations for marketing in PI planning

While it is the responsibility of all teams to discuss their stories with each other, marketing teams embedded into technology trains have some special considerations to keep in mind when participating in PI planning.

Technical teams and other teams may not be aware of marketing capabilities and understand the implications of changes on those capabilities. Technical teams may not be aware of dependencies between marketing work and IT work. In PI Planning, marketers should make a point of going to each team to uncover hidden work or dependencies

For example, if a technical team is building a landing page, marketers might want to write a story for graphic design support, promotional support, and brand review of that page. Those on the technical team may or may not be aware of the needs, opportunities, and dependencies. While working with other teams, including other marketing teams, marketers might realize that the landing page could be leveraged in other places.

## PI planning outputs

At the end of PI planning, the teams on the ART commit to a set of PI objectives. These objectives are derived from the teams' objectives. A PI objective should reflect measurable and actionable goals that map to the business objectives presented at the beginning of the planning session.

In addition, teams build a program board, which visualizes the features being delivered by each team and the iteration in which they will be delivered. It also includes lines showing dependencies between the teams.

With a plan in place, teams are ready to begin their first iteration of work. The teams—marketing and development—have shared purpose, shared understanding and common way of working to more effectively meet their goals.

# Specialize the Principles and Practices

## Agile Quality Practices

Lean and Agile intensely focuses on integrating quality practices into every part of the solution in order to deliver value in the shortest sustainable lead time. Built in quality is one of the SAFe Core Values and applies to marketing teams as well.

Much of traditional marketing structure revolves around putting out a high-quality product. Marketing messages must be accurate and comply with legal, editorial, brand standards and must be reflective of the company. Traditional marketing structures do not necessarily integrate quality into each step of the process. Rather, teams create the work, then rely on extensive review and approvals processes to ensure quality. Lean-Agile practices foster built in quality by making quality everyone's job. Teams do this through:

- **Establishing flow** - eliminating start-stop-start practices, reducing handoffs and wait-states
- **Peer review and pairing** - receive feedback during development, rather than after; pair to ensure quality and broaden T-skills
- **Collective ownership and standards** - ensure everyone is empowered to improve quality based on a shared set of standards
- **Automation** - automate quality checks and processes as much as possible to standardize and improve flow
- **Definition of done** - output meets an agreed upon level of quality and completeness

## How does this look in practice?

An Agile marketing team responsible for email campaigns might start with a shared 'definition of done' that:

- Meets brand standards
- Meets editorial standards
- Has been peer reviewed
- Has a strong call to action (CTA)
- Has a list that meets GDPR and other privacy requirements
- Has no broken links or typos
- Is accurate
- Meets legal guidelines around truth in advertising
- Reflects email best practices

The Kanban board visualizes their work and establishes the workflow within the team, while the story establishes acceptance criteria reflecting the shared definition of done. The copy writer could pair with another member of the team on the copy to ensure quality and build out T-shaped skills. Anyone working on the email - from the graphic designer to the person deploying the email could step in to fix a typo or broken link. The team has shared accountability for the email. Testing the email across different browsers and platforms, checking for privacy compliance and broken links could be automated with software, ensuring a quality email gets deployed. Everyone works together to ensure quality practices are built into the processes.

## Applying Validated Learning

Just like in technology, the battle of opinions often dominates discussions in traditional marketing organizations. Who is to say that one tagline will be more effective than another? Without quantifiable data, discussions often turn into arguments of preferences where the loudest person in the room or the highest paid person's opinion triumphs.

SAFe looks to validated learning through frequent, quantifiable experiments that use data to resolve the battle of opinions. These experiments begin by determining what to test and a well-formed hypothesis. The hypothesis is validated or falsified, leading to learning that can be applied across the entire system.

To apply this, a marketer might adapt an existing campaign brief to include validated learning components. A typical campaign brief outlines the audience, the objective, and the parameters for measurement along with the assets to be created. A campaign brief oriented toward validated learning would include the previous fields along with the hypothesis to be tested and clearly defined success criteria, answering the age-old question of which half of the campaign is working.

The marketer would then begin to run a series of experiments against the hypothesis, gathering data to inform if the hypothesis is true or false. A well-written hypothesis must be falsifiable: it must have the capacity to be proven wrong. Below is an example of a well-written hypothesis statement:

Changing the wording of the call to action from “submit” to “send demo request” will result in more form-fills as measured by data that shows more form completions

Once the experiment is run and the data and insights are gathered, the marketer can then determine if the hypothesis has been supported or not, refine the experiment, and take the next action (Figure 8).

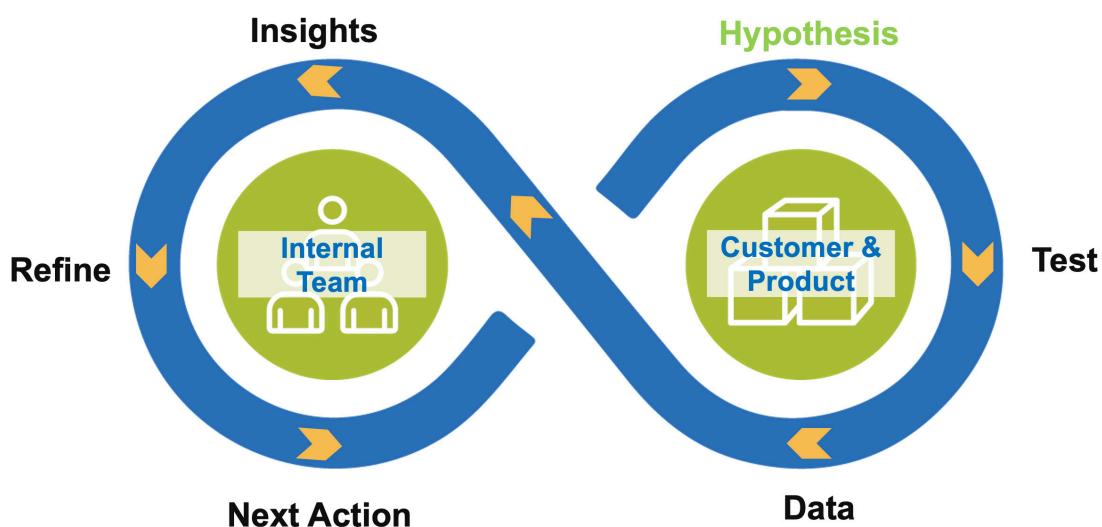



Figure 8: Validated learning cycle

Another key difference between a traditional marketing brief and an Agile approach is the size of the ask. A traditional campaign or creative brief might cover initiatives that are very large in scope or duration. A validated learning environment is looking for the smallest piece of value that can be delivered to prove or disprove the hypothesis. Focusing on the smallest piece of value allows for faster flow and a shorter, less expensive path to learning.

## Summary

A desire to accelerate campaign delivery, innovate, stay aligned, and respond to change in fast-moving markets is driving marketing organizations to consider adopting Lean and Agile practices. SAFe

5.0 provides guidance around how business teams, including marketing, can begin on this journey. It allows marketers to adapt to changing market conditions in a way that focuses on the customer and builds quality into the work, reducing cycle time and improving flow.



Before embracing Agile practices, marketing teams must spend time adopting a Lean-Agile mindset as outlined in the SAFe House of Lean and the underlying principles that drive the Scaled Agile Framework. Only with this mindset in place can teams effectively move into forming Agile marketing teams and joining Agile release trains.

With marketing on the Agile release train, additional value is released. Opportunities for cross-functional collaboration appear, cross-team dependencies are resolved, and alignment is achieved, allowing marketing teams to move faster and more effectively in a rapidly changing environment.

## About Scaled Agile, Inc.

Scaled Agile, Inc. is the provider of SAFe®, the world's leading framework for business agility. Through learning and certification, a global partner network, and a growing community of over 600,000 trained professionals, Scaled Agile helps organizations build agility into their culture so they can quickly identify and deliver customer value, capitalize on emerging opportunities, and improve business outcomes. Scaled Agile is a contributing member of the Pledge 1% corporate philanthropy and community service movement.



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