SAFe for Marketing

Extending towards real business agility
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LACE:
Time to go beyond the Product Development/IT Value Streams... Is Marketing a good candidate?

CMO:
This Agile/SAFe thing is interesting and seems relevant for Marketing as well...

Value Stream shows us Marketing is becoming a constraint for value delivery?
By 2017 the CMO will Spend More on IT Than the CIO

Source: Laura McLellan, Gartner Group, 2012
Marketers also need approaches that embrace uncertainty and complexity...
The Agile Marketing Manifesto

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:

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

Where did the values come from?

We derived these values from previously posted Agile Marketing manifestos, which were summarized in a blog post by Travis Arnold, Roundup: Agile Marketing Manifestos.

Special Thanks

Thanks to the team at Mindjet for hosting SprintZero. SprintZero was organized by Jim Ewel and John Case, with lots of help from Frank Days, Travis Arnold, Robyn Jay Miller, Joscha Kaykas-Wolff, Deborah Miller, Parker Tremol, and Nicolette Andraski.

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http://agilemarketingmanifesto.org/
Customer/Value Oriented Teams

- Aim for customer-oriented teams:
  - A specific customer journey (e.g. per Product/Service)
  - A key business challenge/opportunity/objective
- Autonomous
- Stable
What’s the Value we are focused on?

In SAFe for Marketing we focus on developing marketing as the “Development Value Stream”, with the aim of impacting the buyer journey, which is the “Operational Value Stream”
Enough with the "Shared Services" working a task queue nonsense

Each team should have a purpose, a business-level KPI they focus on. They should be able to have IMPACT.  

"we are purpose beings" ~ Dan Pink
Typical Types of Customer/Value-Focused Teams
Autonomous / Cross Functional

**Autonomous**

Able to deliver marketing value without dependency on other teams/functions

Typically requires marketers from multiple specialties

Encourages and enables marketers to become more and more versatile (T-Shaped/Full Stack Marketers)
Authorized to go #ForTheWin
<table>
<thead>
<tr>
<th>Jenny</th>
<th>Steve</th>
<th>Emily</th>
<th>Mary</th>
<th>Lauren</th>
<th>Don</th>
</tr>
</thead>
</table>

**Breadth of Knowledge**

<table>
<thead>
<tr>
<th>Analytics</th>
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<th>Communications</th>
<th>Competitor Analysis</th>
<th>Copywriting</th>
<th>Customer Success</th>
<th>Email Marketing &amp; Intelligenc</th>
<th>Lead Generation and Traction</th>
<th>Marketing Strategy</th>
<th>Mobile Marketing</th>
<th>Partnerships</th>
<th>Predictive Analytics/Metrics</th>
<th>Pricing Optimization</th>
<th>Publicity</th>
<th>Referral / Influencer Outreach</th>
<th>Remarketing</th>
<th>SEO/ASO</th>
<th>Social / Inbound</th>
<th>High Tempo Testing</th>
<th>Story Telling</th>
<th>Surveys</th>
<th>Video Marketing</th>
<th>Website Auditing</th>
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**Depth of Expertise**
“Working Marketing” in small slices using Definition of Done

Definition of Done
- Ready to go live (or even live already in some contexts)
- Meets brand guidelines
- High quality
- Reviewed and accepted by Marketing Owner
- Enabled all relevant parties (e.g. Sales enablement)
- No increased technical debt
- No increased marketing debt

I haven’t screwed up our brand/reputation

I haven’t made it harder to develop more marketing in this area later

http://blog.crisp.se
TESTING AND DATA OVER OPINIONS AND CONVENTIONS
Sean Ellis, Growth Hacking & High Tempo Testing

Google “growth hacking is a process”
Agile Marketing @ Scale
When would you need to SCALE Agile in Marketing?

▪ Truly autonomous teams working on separate backlogs and activities, with minimal dependencies? Just stick to team-level practices. On the other hand, if ...

▪ Teams ARE working on one bigger customer journey, have dependencies across teams and some floating specialists that need to be involved in multiple teams?
▪ Considering synergies and adjacency campaigns between products/services?
▪ Heavy dependency on “Suppliers” (e.g. Agencies, Content providers, external parties, Legal, Procurement)?
▪ Running marketing activities (e.g. Webinars, Conferences/Events, National campaigns) that require some roadmap/forecast/predictability?
SAFe is the world’s leading framework for enterprise agility

- Provides the principles and practices to deal with Marketing’s real-world challenges
- Used by Product/Engineering/IT – benefit of similar language

scaledagileframework.com
Mapping Essential SAFe to a Marketing Context

Real Agile Teams and Trains

Lean-Agile Principles

Lean-Agile Leadership

System Demo

Cadence and Synchronization

MarOps and Releasability

Inspect & Adapt

Architectural Runway

PI Planning

IP Iteration

Lean-Agile Leadership

SAFe* for Lean Enterprises

SAFe Principles
One of the elements marketers find most useful – Economic prioritization at the “Feature” level using WSJF

What are “Features” in the Marketing world?

• Campaigns…
• Plays…
• Significant change to the buyer’s journey…
Challenges with SAFe in Marketing

- Marketers don’t like lots of process
- SAFe is too complex for them (yes, even Essential…)
- Using a process/approach chosen by IT/Product isn’t always considered an advantage in the Marketing group… NIH…
- One of SAFe’s advantages is the strong curriculum that supports the Implementation Roadmap. Most of this curriculum is too product/systems-oriented to work in a marketing context.
- Be very careful with using SAFe verbatim in a different context such as Marketing.
How much of this applies in a Marketing context?

250,000
SAFe-trained professionals in 110+ countries

180
Scaled Agile Partners in 50 countries

70%
US Fortune 100 enterprises have SAFe-trained professionals

2 million
Annual visitors to SAFe and Scaled Agile websites

Freely Available
SAFe’s knowledge base is freely available at scaledagileframework.com

Training
A comprehensive role-based curriculum for successfully implementing SAFe and skills validation through professional certification.

Configurable
SAFe is able to accommodate enterprises of all sizes and industries

Fastest Growing Method
SAFe cited as preferred solution for scaling Agile:
• 2017 Agile in the Enterprise survey by Gartner Research
• 12th Annual State of Agile Report by VersionOne
• 2017 Scaling Agile Report by cPrime

Pledged 1%
Scaled Agile stock equity & employee time to Pledge 1% campaign

S A F e C A S E S T U D I E S

30 - 75%
Faster Time-to-Market

25 - 75%
Increase in Productivity

20 - 50%
Improvements in Quality

10 - 50%
Increased Employee Engagement
Practical considerations

Realize you’re applying SAFe outside its comfort zone – tread carefully and try to find SPCs/SPCTs with the appropriate experience and an open pragmatic mindset.

Carefully consider whether/how to use the official curriculum.

Emphasize principles and figure out the practices that work.
Towards the “CX Train”...

Optimizing the experience requires work from Product/Dev/Mar/Ops throughout the value stream. (e.g. create a freemium to support the mid-funnel, or use marketing content to increase retention)