

# Agile Playbook: Aligning Content Work with Agile Processes

## OBJECTIVES

1. Identify, present and implement new project management operations that can be scaled to other service areas
2. Adapt project management to improve internal or external workflow process, governance or production process as it relates to Content Strategy

## RECOMMENDATIONS

- **How can you apply project management best practices to content production?**
  - Work with service team leads to build in internal milestones during the internal kickoff call
  - Educate service team leads on time estimations for content production tasks
    - Example: [Content workflow effort calculation spreadsheet](#)
  - Call out project risks as early as possible based on dependencies and delays
  - Apply time boxing to deadlines and establish where to draw the line with clients during critical project phases (and why)
  - Break out project lifecycle into “sprints” and identify what will be shipped on a weekly sprint schedule
    - Sprint 1: Discovery // Deliverable: ‘What We Heard’ Recap Doc
    - Sprint Planning (with team leads) - How many tasks can we realistically commit to completing in a weekly time frame?
    - Daily/Weekly Standups (per project team) - What did you finish yesterday? What are you doing today? What’s blocking you? Who do you need help from?
    - Sprint Review (with team leads) - How many work hours are left in this sprint?
    - Project Retrospective (per project team) - What do we want to avoid/repeat next time?
- **What are gaps on the Content Strategy team that can be resolved or filled with project management?**
  - Team members sharing more accurate time estimates for tasks
  - Individual roadmaps created and accessible to outside team members or Service Area Team Leads to help anticipate capacity issues
  - More delivery group support: collaborative work sessions and brainstorming

- Idea: outline a rough draft on a deliverable that all team members agree with
  - Build in internal timelines for Q/A review with project teams
    - Idea: 30min “work blocks”
  - Determine ‘product owners’ in each project to serve as single client point of contact, prioritize work and be the internal stakeholder for approvals before client delivery
  - Document topline process steps as tasks with estimations and dependencies
    - Example: [Project Roadmap Template](#)
- **What tools can the Content Strategy team trial to improve workflow process, governance or production?**
  - Asana: <https://blog.asana.com/2017/08/create-execute-marketing-strategies>
  - Basecamp:
    - Adjust templated breakdown of tasks per project size – typical timeline for 1 program versus 3+ programs must vary and take into consideration extended turnaround times and individualized tasks
    - Challenge: Clients get overwhelmed at the amount of deliverables to review within 48hrs. They need more time to meet with stakeholders and provide valuable feedback. If we extend turnaround times and adjust the timelines without compromising project launch goals, it’ll make for a smoother delivery/production process and reduce additional feedback rounds or edits that tend to trickle in after initial approvals
    - Idea: 1 Program = 72hr feedback/approval versus 4 Programs = 5 day feedback/approval
    - Standardize nomenclature across deliverables and how it's presented to clients
    - Develop a quality assurance checklist for each deliverable
    - Treat Basecamp for ‘product backlogs’ that showcase remaining tasks/work list
  - Team Pods: build the same team, with the same roles, and assign new project assignments
- **How can we standardize client interaction throughout project lifecycle?**
  - Create client interaction scripts that align with each stage of a project lifecycle or based on client FAQs
  - Create “What We Heard” strategy documents based on learnings from discovery sessions, research and collected assets to inform strategic recommendations and shape initial project deliverables
- **How can we educate clients on our collaboration style, tools and overall expectations?**
  - Create a one-pager of UX/design principles for feedback guidelines during production
  - Include best practices, recommendations and language at the onset of a new sale, such as client kickoff calls, discovery meetings, and in Basecamp tasks
  - Explain goals of the Q/A process during Discovery
  - Explain timeline setup/lead times and impact on deliverables if delayed

- Explain the “why” of requested feedback
- Create sense of urgency and accountability when dependencies occur or share project risks when delays occur
- Stress partnership at the onset of projects
- **How can we streamline point-of-contact communication and client management?**
  - Identify go-to person to be in charge of asset management who can also educate team members on how to analyze/use assets for strategic purposes
  - Talk through client expectations and contextual insight during internal kickoff call with Account Managers and Service Area Team Leads
- **Other ideas**
  - Work with Content Strategy Director on creating a one-pager for freelance assignments
  - Think how deliverables serve the end user versus client
  - Think about deliverables as problem solvers rather than strategy