



# Transforming an Advertising Agency: Bringing an Agile Mindset Beyond Engineering

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Vistaprint transformed its software development teams to Agile, reducing release cycles from 18 months to three weeks. But Marketing had to move faster to match this pace. The bottlenecks seemed to be in the in-house advertising agency. Could Agile work for the Agency? Yes it could!

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## 1. INTRODUCTION

Vistaprint is an ecommerce company specializing in mass customization of printed materials for tens of millions of micro-businesses worldwide. We transformed our software development teams to Agile, reducing release cycles from 18 months to three weeks. But the creative work (e.g. graphic design, copywriting, UX) had to move faster to match this pace. The bottlenecks seemed to be in the in-house advertising agency (aka The Agency). Could Agile work beyond software?

With a combination of in-depth training, embedded coaching, big visible boards, and a focus on the Agile mindset, we reduced the lead time for one of our agency teams (North American email) from eight weeks to nine days. The cycle time dropped from 15 days to four. Late night and weekend work disappeared. The on-time delivery rate soared and quality did not suffer. This approach is now being used to spread the Agile mindset (and best practices) to our managers, senior leaders and European operations. Showing that Agile works well outside of software has smoothed the way for an enterprise-wide transformation.

## 2. BACKGROUND

At Vistaprint, the Agency supports a vast array of marketing campaigns spanning traditional (direct mail, TV, and radio) and digital (web sites, email, banner ads, and landing pages) channels. Even with 150 employees on three continents, the Agency has been struggling to keep up with demand. This was particularly true for the email channel.

The Agency was tired of being blamed for emails being late. The “clients” in Channel Marketing (the customer facing teams for each channel who relied on the Agency for their creative assets) were tired of being blamed for using too many Agency resources. Creative requests (CR’s) were submitted eight weeks before their internal deadline in order to meet the promotional calendar. A Lean/Agile consultant who transformed the technology group to Agile looked at the email value stream and found that process efficiency could be as low as 3%.

This Agile journey had its ups and downs. The key was to rebuild mutual trust. The backlog had become so large and the lead time so long, that the clients did not trust the Agency employees to deliver on time. The feedback loops were so long and complex that the Agency did not trust the clients to give them timely, effective feedback. The project manager had been assigning tasks for so long that she did not trust the team to be able to self-organize. She did not think it was possible.

To rebuild trust, we (the coaches) had to get each group to see the others as hard-working fellow employees who had the best interest of our external customers and the company at heart. As coaches we brought them together for Agile education, hands-on exercises, small experiments that they designed, ceremonies, and of course, food (Rising & Manns, 2004). Success built upon success. Hand-offs became collaboration, clients became partners, team members pulled work from a prioritized list of “on deck” work and trust slowly built up. We had torn down the silos.

Three months later, the North American email team was holding daily standups in front of their Kanban board using WIP limits and swim lanes (for different classes of service). They were tracking lead time and cycle time rather than hours worked. The Agency team was pulling assignments from a prioritized backlog instead of having a project manager assigning tasks months in advance based on projected availability. The partners (formerly known as clients) were coming over to the designer’s workstations – working shoulder to shoulder with writers, designers and strategists.

The steps along this journey included team chartering, an education vision and pathway, embedded coaching (coaching in the moment as well as private 1:1 meetings), and a constant reminder to **be** Agile and not just **do** Agile. One of the key success factors was strong support from senior leadership. However, the single most important factor was to tear down the silos - leading to cross-functional collaboration.

### 3. OUR STORY

There are many stories behind this journey. They overlap and interweave. Each brings its own point of view and varying levels of detail. In this paper we summarize the journey from three different perspectives: the executive sponsoring the initiative, the two teams most directly involved, and two individuals who guided the transformation (the authors).

#### 3.1 The Executive Story: Bridget (VP of the Agency)

The Agency was often cited for everything being late. I knew that the truth was somewhere in the middle.

In 2014 we incorporated the User Experience Design team into the Agency. As part of the software Agile transformation, we decided to embed UX designers into their Scrum teams. This basically eliminated the 12-week lead time for the creative work that had been blocking the web developers. I wanted to raise the bar on performance throughout the agency. I met with the Lean and Agile coaches and consultants and asked them to identify opportunities for the biggest impact on performance. They interviewed employees across the office and identified areas where we could substantially decrease waste and increase throughput.

Having tried everything else, I was open to following the Agile coaches’ advice. We decided to initially focus on the North American email team’s process flow. The coaches provided an assessment that showed very low process efficiency, in some cases it took eight weeks to deliver 24 hours of work. We followed their advice and had the team create a Kanban board and do daily standups. We hired a dedicated coach. He started training and mentoring the team while helping me to understand the high level values and principles. I asked the team to experiment with new ways of doing things. I made it clear to them that some experiments would fail and that was ok as long as we learned.

One thing that was clear to me was the need to go beyond the Agency model of working for clients. We had to change the mindset to partner with our marketing channel leads. I sent a memo to the entire department asking people to drop the term “client” from their vocabulary and refer to them as “partners”.

Three months later the eight week deliveries were reduced to three weeks. This wasn’t good enough. The team accepted a BHAG (Big Hairy Audacious Goal) to cut that in half. After another three months they met this challenge. Based on these results, the VP of Channel Marketing and I asked the CTO to continue to dedicate a coach to our teams. We wanted to have every team work as an Agile team, including our distributed teams in Barcelona and Tunis.

Today my colleagues and I on the Vistaprint Executive Team are trying some Agile experiments of our own. We work together in an open area. We have a Kanban board for our team projects with regular standups and retrospectives. We are committed to making Vistaprint an Agile company.

#### 3.2 The Team Story: The North American Email Team

Creating marketing emails was taking far too long. As a team we recognized that we had issues with feedback, taking several days to consolidate and deliver. We had a dependency on written feedback which not only added to the time it took to deliver, but also prevented collaboration due to the prescriptive nature of such formal feedback. This process caused a lack of trust and alignment between the email marketers and the Agency.

We also recognized it was unclear who the decision makers were in Channel Marketing. The agency's role was to deliver creative assets (designs and/or copy). When these assets were reviewed, the core team did not know who did or did not need to be involved in its approval. Going through several people (serially) at multiple management levels for feedback and approval left the core team feeling un-empowered.

There were far too many projects in flight. Multitasking forced people to shift focus often. Limited visibility into the work of other team members made it hard to work together on the most important projects. This resulted in late deliveries.

We knew we needed to change. We got the support from our leadership team to go Agile. The pilot program for the North American email Agency and Channel Marketing teams began.

We decided to have a dedicated team consisting of account management, project management and designers solely working on email. We agreed on our current issues in order to create upfront alignment and visibility. This allowed us to move forward in a united way to optimize our processes throughout the pilot.

We wanted to create a culture of less formal meetings and more face-to-face communication. We also recognized the need to rebuild the trust and relationship between our teams. By getting to know the people we work with on a more personal level, the designers and copywriters in the Agency and their colleagues in Channel Marketing were more approachable.

With the guidance of our coach, we adopted a mindset shift to be more in line with the Agile principles. The main principle behind this mindset is to trust that everyone does the best they can. This was top of mind when we began to experiment with different process changes in an effort to continually improve. Using our behavior training and a variety of tools and practices we were able to shift into a self-organizing Agile team.

With our Kanban board, we implemented the practice of daily standups between the marketers and the Agency partners. This visibility allowed for clear prioritization of projects within the pipeline. We were also able to establish work in progress (WIP) limits which allowed us to have a clear focus and rally around the completion of projects. Having a clear WIP limit enabled the team to pull work into their queue instead of waiting to be assigned a project. The introduction of these practices fundamentally altered the way the team completed work.

Also drastically changing our process was the introduction of the Idea Pipeline used to submit work requests. In the past, the email marketers would need to submit requests multiple months in advance with full details even though we often didn't know what those details were. This resulted in incorrect data and last minute change, which proved to be incredibly frustrating to the team. With the idea pipeline model, we still submit tickets far in advance, but with very limited detail filled out. Once the team is ready to begin work, we fill in the ticket so that it has accurate and up to date information. The Kanban tool has allowed transparency into when the team will pull work, which enables us to assess tickets at the appropriate time.

Lead time is measured from the time a request in the ready queue until it is completed. Before our pilot started in January, this had taken us upwards of 40 days. When our pilot formally ended, we were down to 15 days, reducing the time it took by 63%. Our current lead times are under seven days, for a lead time reduction of 83% overall.

While lead time measures the completion time from when the ticket is ready to be picked up, cycle time measures the actual days spent working on a project by the design team. When the pilot started, it would take us over two weeks to complete a single email request. Similar to the lead time trend, we were able to reduce this drastically and were down to just eight days in May. We had a BHAG (Big Hairy Audacious Goal) to reduce cycle time to under five days by the end of Q1. We have met this goal and decreased overall cycle time by 73%.

We also wanted to add some visibility into how these successes break down into delivery metrics. In the past, the majority of email assets were delivered severely late. This prevented the email team from being able to properly set up and QA emails according to best practice standards. Now, the vast majority of all emails are delivered on time, if not early, and the assets delivered late are typically only late by a day, which does not affect downstream email deployment.

### 3.3 The Other Team Story: The Web/UX Team

As the technology teams moved from Waterfall to Agile, the experience design team in the Agency still worked 8-12 weeks ahead of the development teams. The designs were the "requirements" for the developers who wrote stories for their backlog based on those designs. As the developers worked on implementing the designs and ran into technology roadblocks, they modified the design to fit the technology or time constraints. The designers were frustrated because the implementation was far from their vision. The developers were frustrated because they were asked to implement elaborate designs without enough time to do it right.

At this time a cross-functional team was formed to create a platform for mobile development consisting of a product owner, project manager, experience designer, graphic designer, developers, and testers. They worked collaboratively, iteratively, and incrementally to resolve tradeoffs between design and implementation. The design team visited actual customers and watched how they used the existing desktop site on their mobile devices. Taking an MVP approach, working software was delivered early and often. It was validated with customer feedback. The team members were all proud of what they delivered. Getting things done at warp speed without sacrificing quality was very satisfying.

Based on this experience, the checkout team requested that design and analytics employees join their core team. Designers collaborated with developers to conduct research a sprint ahead and deliver designs in-sprint, reducing cycle time to between three and six weeks. They introduced personae into their stories, keeping the customer in mind throughout the sprint. The team was proud of the experience they delivered to the customers by providing a checkout flow that was optimized for mobile devices. There were team-building activities driven by face-to-face communication that increased trust. The team was delivering early and often with frequent feedback loops, transitioning from handoffs between functions to frequent deliveries with daily feedback and iteration.

Next, designers were embedded into the “option selection team” and applied the same model of close collaboration with designers on the development team. The team used low fidelity prototypes and very minimal implementations to validate designs with external customers in the US and the UK. Based on this feedback they adapted the designs to help achieve a better business outcome. The new experience made it much easier for customers to purchase the right combinations of options, reducing calls to Customer Service and increasing customer satisfaction.

We clearly demonstrated that embedding UX designers into development teams resulted in better business outcomes. The customers could more easily navigate the site and purchase the items that best met their needs. The designers and developers worked more collaboratively which reduced the frustration. The business was able to deliver higher value, faster, with better quality.

The Agile Coach’s Story: David

Before joining Vistaprint I managed software development organizations and coached Scrum teams. During this period I met Lyssa Adkins, read her book (Adkins 2010), participated in her coaching circle and took one of the classes offered by her group. The coach that was emerging from within me forced my manager side to recognize that I too was a “recovering command and control-aholic.” These experiences prepared me to become an independent Agile coach. Engagements with some large companies led me from coaching software development teams to aligning User Experience teams with the many Scrum teams that they supported throughout their enterprise.

This led to an opportunity to coach The Agency at Vistaprint. Their technology teams had successfully migrated from a heavyweight waterfall process with lead times measured in years to an Agile development process (mainly based on Scrum) with releases into production every three weeks. Lead times for creative requests were still typically 8-12 weeks. I was asked to focus on this problem, starting with the North American email team. The Agency team consisted of a project manager (who assigned tasks to designers and writers before the projects started), an account manager (who “owned” the relationship with the clients), an art director (who approved all of the work before it was shared with the client), and four designers. This team was supported by a copywriter, a proofreader, and an offshore team of four production artists who were responsible for image processing and generating HTML. Following the agency model, the creative team’s goal was to satisfy “the client”, i.e. the Channel Marketing email team that sat in another wing of our building.

I started by meeting with the Agency Vice President. She was tired of being blamed for advertising campaigns being late. Next, I met with the Vice President of Channel Marketing. She was tired of being blamed for using too much of the Agency resources. They were the first two entries in my stakeholder map, a simple Excel spreadsheet that eventually listed every person connected with the email value stream – their name, title, responsibility, concerns and some attributes (e.g. degree of support/resistance to Agile, impact, influence). As I interviewed people on the team, people that were dependent on the team, and people that the team was dependent on, the stakeholder map grew and grew. I asked about what they do, their pain points, suggestions for improvements, etc. I started observing their daily standups in front of their big visible, but rudimentary Kanban board.

My next step was to charter the team as an Agile team. But, who was really “on the team?” In addition to the core team mentioned above, the copywriter was part of a shared resource team. However, he was effectively dedicated to the email team. Other copywriters were only assigned the overflow work. He was “on the team”,

the other writers were not. Also, the clients were not really external clients who could easily take their business to another agency. They were fellow employees – part of the work stream delivering value to the external customers. They became partners, joined the chartering process and attended standups and retrospectives.

As part of the chartering workshop, I introduced the team to VFQ (Value, Flow, Quality – an Agile education framework from Emergn (VFQ) and the Agile Manifesto (AM) values and the principles. I watched people struggle with the overwhelming focus on working software and wondered how we could reduce the resistance generated by that concept without abandoning the underlying messages. We overcame that resistance by introducing the Agile Marketing Manifesto (AMM) which does not mention software. It values marketing programs and incorporates Lean Startup thinking (Reis 2011) while maintaining the spirit of the original Agile Manifesto. I also facilitated breakout groups that focused on quick experiments that they could run to address the biggest issues that were slowing them down. I was amazed to see them designing good solutions to hard problems, particularly the ones related to their own work habits and processes.

I continued working with this team on a daily basis. I provided mentoring and coaching to the art director/manager, account manager, and project manager. We designed an Education Vision – a set of three workshops (two hours each) chosen from 18 different topics ranging from the Agile Values and Principles to Value, Flow, and Quality and, more specifically, Scrum and Kanban. I introduced retrospectives that set the stage by focusing on Norm Kerth's Prime Directive (Kerth 2001).

As the team demonstrated visible progress (significantly reduced lead and cycle times without sacrificing quality or business outcomes), I broadened my focus to the rest of the Agency. In conjunction with the leadership team we created a cohort of 10 managers and directors. I co-facilitated an Agile Practitioner Pathway (APP) for this cohort. This APP was a 12-week program with one full day of interactive training followed by weeks of reading, homework assignments and seven workshops (two hours each). We gradually converted a room full of skeptics into leaders who were willing to look for ways to become Agile. This change in mindset happened over the course of the program. We taught them some key Agile principles and practices, including:

- The Agile Values and Principles from the Manifesto
- Break batches into smaller chunks in order to deliver early and often
- Optimize flow by reducing WIP
- Improve quality with fast feedback
- Focus on delivering value to the customer
- Become servant leaders to motivate teams

The true believers became Agile champions. They convinced VP of the Agency to double down on Agile. Some of them took our training materials and transformed the next team. I had unleashed the ability for this advertising agency to sustain its own transformation.

#### 3.4 The Other Agile Coach's Story: Staci

I was surrounded by talented yet demotivated colleagues.

While working as a UX Designer in the Agency, I enthusiastically volunteered to be a member of an early pilot, embedding UX designers into a development Scrum team. The developers were frustrated with the additional 12 weeks that UX added to their schedule. The hope was that embedding a UX designer into the Scrum team would drastically reduce this overhead. This team was given Agile training and coaching. It was my first formal exposure to the Agile Manifesto and Scrum.

As a team, we experimented with all aspects of our process and working agreements. Some examples include co-location, rapid cross-functional design sessions, story estimating, UX/design, development and QA tasks under a single story in the same sprint, daily standups at a story board, face-to-face as the primary mode of communication, using personas (Cooper 199) to influence requirements, informal and less frequent internal reviews - UX/design autonomy, rapid prototyping, off-site team building activities, and more.

This was the first time I had experienced a cross-functional team working together, respectfully blurring the lines between functions, driving their own process, and having pride in the work they produced.

I wanted to share this experience with other designers to get them to consider new ways of working that would be satisfying and motivating. I started within the Agency hosting brown-bag discussions, book clubs, facilitated education sessions, and other similar activities for the design group. I took some of these sessions to our counterparts in Barcelona, Spain, which gained the attention of senior leadership. This created pull-signals

for more Agile education, particularly within the Agency and Channel Marketing. In parallel to all this, we had surprising success with the North American Email Pilot.

The software development teams used Scrum. However, the Agency teams used Kanban since they tended to work on smaller projects in continuous flow. In order to broaden my knowledge and have a bigger impact on the organization, I went on a learning expedition that included Kanban training from David Anderson, CSM training from Jeff Sutherland, and lots of reading (e.g. Sharon Bowman's Training from the Back of the Room, 18 books in the VFQ curriculum, and Mario Moreira's Being Agile).

At Vistaprint, armed with this training, I observed resistance to the software centric Agile values and principles, which led to Vistaprint's version of the Agile Marketing Manifesto (AMM). These marketing values and principles resonated better with our creative audience and helped bring together partners throughout the organization (both the Agency and Channel Marketing). It was around this time that the VP of the Agency sent a memo declaring that we will no longer refer to our internal counterparts as "clients" but rather "partners".

By this time, I had established trust among influential managers and colleagues. I worked with the VP of the Agency to create a new role for myself as Agile Coach, reporting directly to her. As a member of the Agency Leadership Team, I had the ability (and responsibility) to impact all groups and channels at all levels. This was a strong signal to the rest of the organization.

I began co-teaching a cohort of Marketing and Agency managers in value, flow and quality (VFQ). This helped them develop an Agile mindset and encouraged the teams they managed to collaborate with each other.

I provided coaching to the Landing Pages team using the same engagement model we had used for the transformation of the North American Email team. I started by creating a stakeholder map and conducting 1:1 meetings with each team member. I began daily engagement with this team and facilitated a team chartering session, which included a team purpose, goals, norms, role expectations, and designing a first experiment. This was followed closely by an ongoing education series. I continued mentoring department managers and the project manager. I am also coaching additional teams as we broaden and deepen the Agile transformation in the Agency.

#### 4. WHAT WE LEARNED

We saw some consistent patterns whose underlying causes are lack of trust, siloed communication, and ineffective feedback (too little or too much). Trusting the teams to collaborate and experiment delivered amazing results. By bringing the Agile principles into the Agency, the leaders saw the benefits and supported expanding the Agile transformation beyond Engineering.

#### 5. WHAT'S NEXT

With rousingly successful pilot projects under our belt, we are extending Agile throughout the Agency. We have demonstrated that Agile can work for creative design whether working with software development teams or Channel Marketing teams. Today, all of the digital channels are being trained and transformed. Additional pilots are focusing on multi-national distributed teams that deliver daily in 17 different languages. Managers are going through 12-week education programs (with a focus on the Agile mindset). Channel Marketing employees are going through training and coaching programs alongside their creative partners.

Senior leaders are being trained. Executives are using Kanban boards, having standups, and retrospectives. They are running their own experiments to become more Agile themselves. We are leading the charge towards an Enterprise Agile transformation beyond software development.

#### 6. ACKNOWLEDGEMENTS

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