



MAY 19, 2015

Agile Methods *for Inbound Agencies*





How do you
manage projects?

Browser tabs: asana logo - Google Search, Project management softw...

Address bar: https://www.linkedin.com/groupitem?view=&gid=2879340&type=member&item=5865472590994231299&trk=groups_search_item_list-0-b-ttl&goback=%2Egna_2879340

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HubSpot Partners Forum 4,546 members Member

Discussions Promotions Jobs Members Search

Project management Manager's Choice

Jackie Clews Co-Founder at Dig...
+ Follow Jackie

Hi everyone, Does anyone know of any good software for tracking time or overall project management?

Like (9) • Comment (94) • Follow • Report

Comments

Jason Diller, Trent Smith and 7 others

94 comments • Jump to most recent

Walter Pollard Digital Marketing | Inbound...
Jackie - I use TeamWork PM...
Like • Reply privately • Flag

Remington Begg Chief Remarkable Officer...
I second teamwork.com. For...
process.
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Browser tabs: Becoming an Agile Ac..., Dan Mangan | Symph..., Yeti Cycles, CH The Chronicle Herald, Mountain bike news, Time tracking or proje...

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HubSpot Partners Forum 4,750 members Member

Discussions Promotions Jobs About Search

Phill J Smith Founder & CEO of Frozen Lemon Media - Inbound Marketing Agency

Time tracking or project management software recommendation?

Anybody know of any good software for tracking time or overall project management?

Comment (10) • Like (0) • Unfollow • Report spam 5 days ago

Thomas O'Duffy

I've used several...

- CentralDesktop - Sophisticated but not quite intuitive
- BaseCamp - Easy to use but too simple
- Trello - Useful for collaboration & clarity / team thinking but not ideal for co-ordinated execution
- Asana - Beautiful for outputting to do lists, great UX, not powerful enough
- MS Project - Way too complex & clunky unless you're involved in very complex project management. Barely appropriate for hacker style development where there are many unknowns and accurate estimation is impractical.
- Yammer - Great for a team sharing topical knowledge with eachother... not a project management tool, more of a shared awareness tool

My favourite to stay organised & get things done: Teamwork.com is a perfect balance of simple, powerful, intuitive and practical.

Like (0) • Reply privately • Report spam 5 days ago

Phill J Smith

Thanks Thomas, would any of these softwares measure and record time spent on client facing work, how much time each team member spent doing what, when and for how long?

Like (0) • Reply privately • Report spam 4 days ago

Jeff White

If you're going to be at Partner Day next week, I'll be giving a talk about Agile project management and how we use the JIRA/Tempo suite for PM, time tracking, and project planning. It's less of a piece of software, and more of a major shift in how you run your agency that pays

Your group contribution level

Getting close! Reach the next level and you could get featured on the group homepage.

Building a Following |

Subgroups

- Old - Small Group Sales Coaching 8 members
- Socios de HubSpot de Habla Hispana 177 members
- Inside Inbound Marketing Group 5 members

See all subgroups ▶

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asana:

PODIO

JIRA

Trello



How/why Kula
made the switch

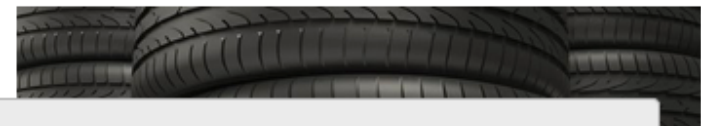
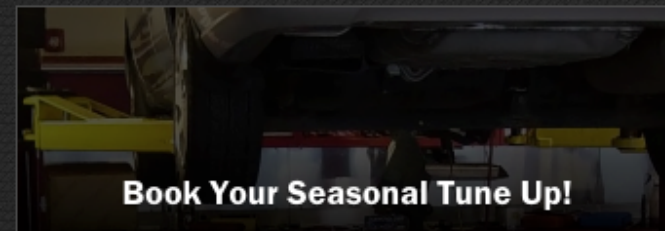
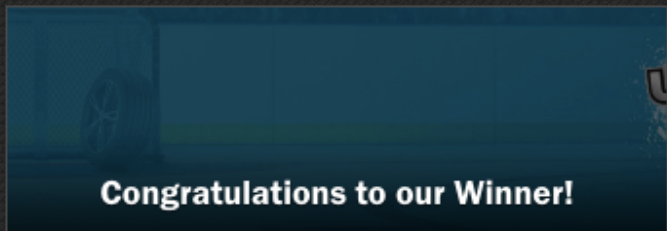
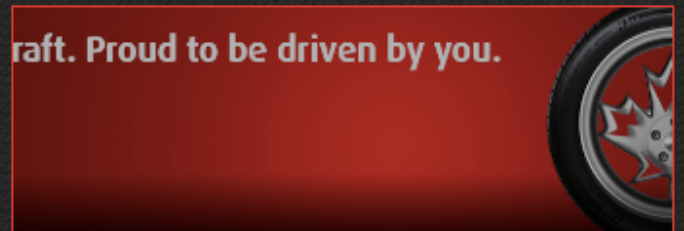


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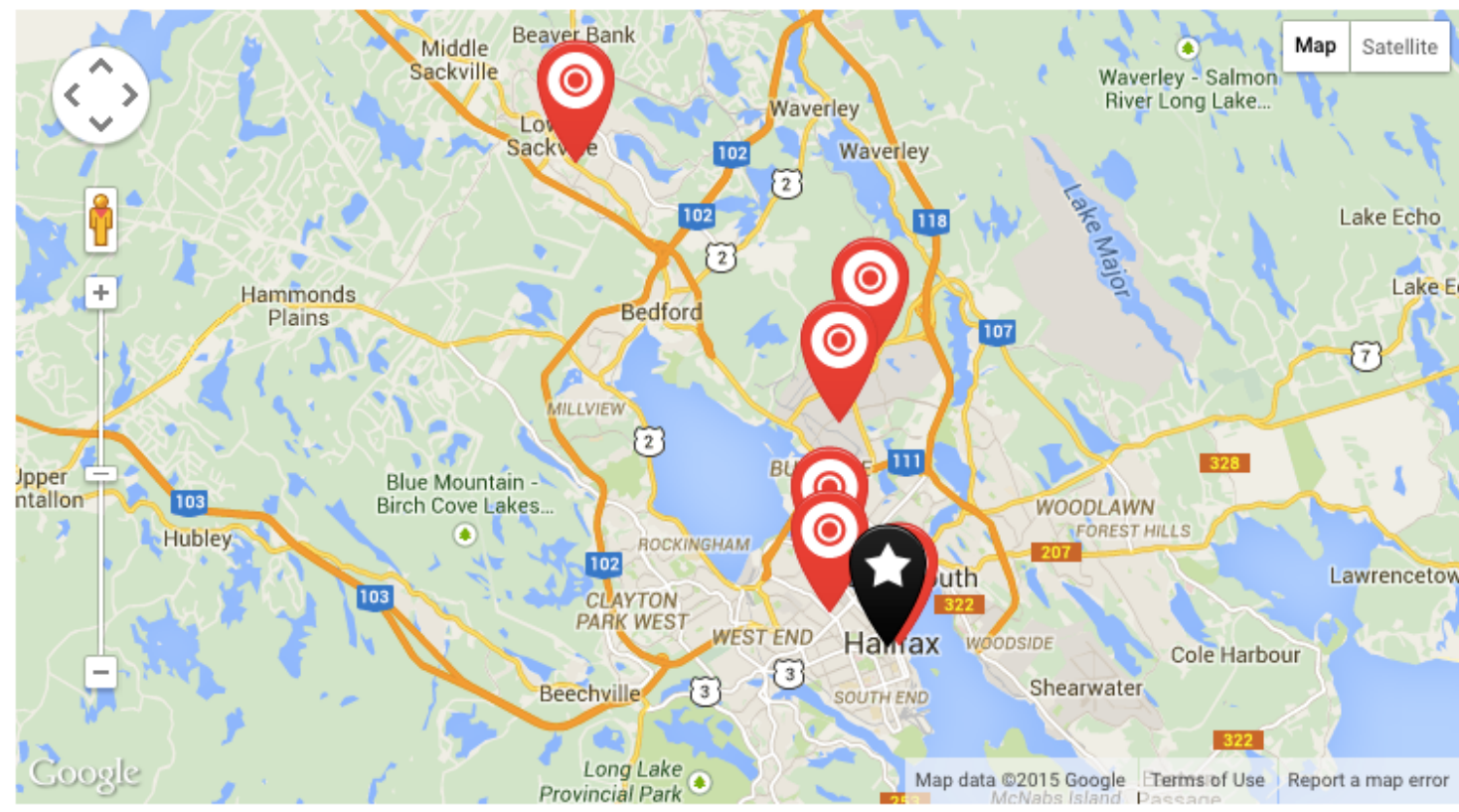
Halifax Tirecraft (Speedy Auto) [view »](#) **Halifax**

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Halifax, Nova Scotia B3K 4P2
Phone: 902-455-5487

📍 🔧 🚚 🚜 🚛 📄

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Halifax, Nova Scotia B3K 2X6



- 📍 Passenger/Light Truck Tires
- 🔧 Automotive Services
- 🚚 Commercial Tires & Services
- 🚜 Agro / OTR Tires
- 🚛 Mobile Tire Services
- 📄 Fleet Cards



Find your Tires

By Vehicle By Tire Size Required (*)

Year * 2014 Make * BMW

Model * M5 Trim * Base

Tire Type Performance Tires

265/35ZR20 (99Y) XL Alternate OE 295/30ZR20 (101Y) XL Alternate OE

265/40ZR19 (102Y) XL Alternate OE 295/35ZR19 (104Y) XL Alternate OE

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What is Agile *Project Management?*

Latest activity in your project

Your project: [Snapier LLC](#)

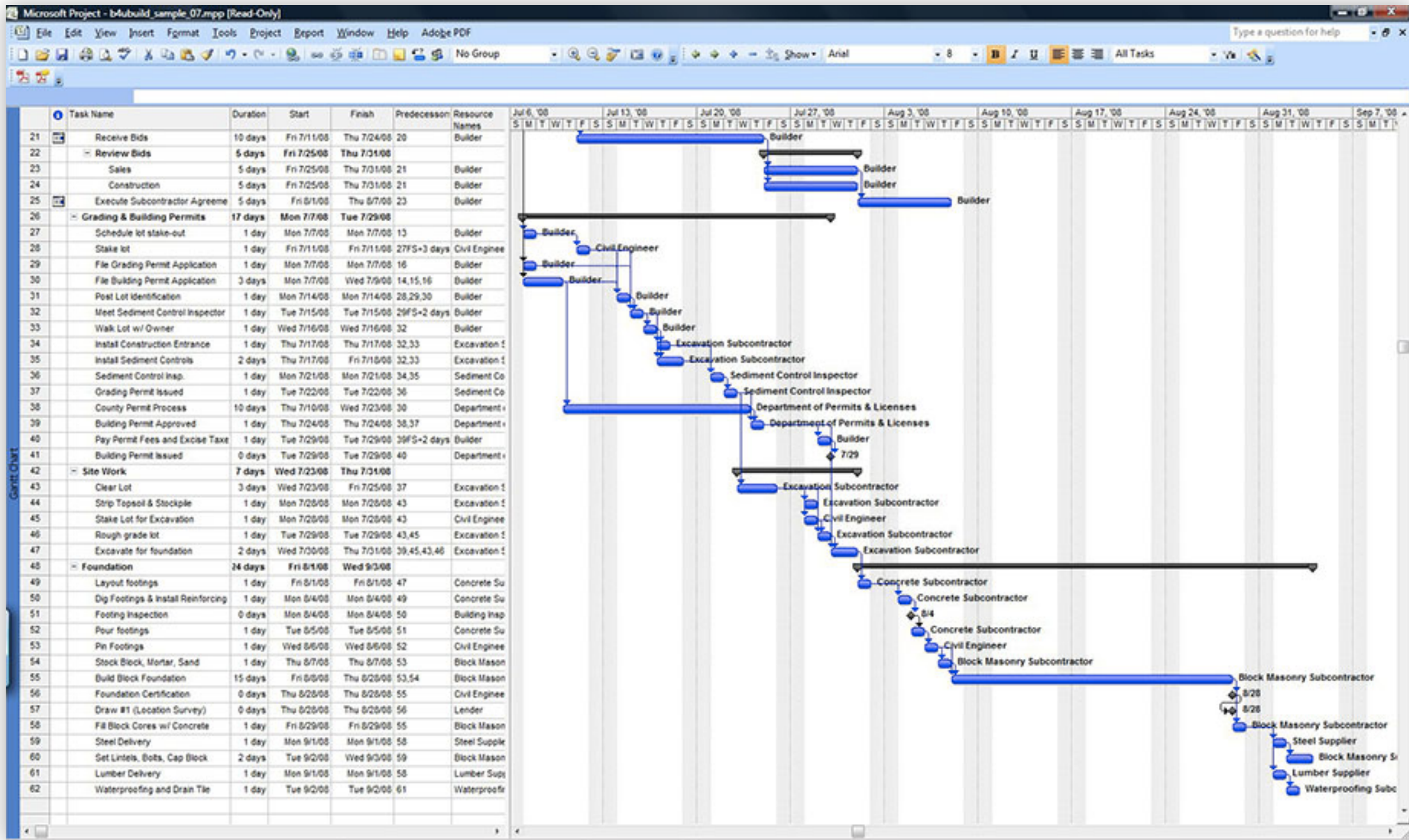
[Review 26 overdue milestones](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	Jul 1	Today 2	3	4	5	6
7	8	9	10	11	12	13

[View the full calendar](#)

Snapier LLC — Snapier LLC

Milestone	New Time Thingy	Assigned to Snapier L.	Jan 20
Message	From a test.	Posted by Wade F.	Jan 20
To-do	KNOOP DOES work I know. From scratch.	Assigned to Anyone	Jan 20
To-do	No more fancy things. From scratch.	Assigned to Anyone	Jan 20
To-do	Do another fancy thing. From scratch.	Assigned to Anyone	Jan 20
To-do	Do something fancy. From scratch.	Assigned to Anyone	Jan 20
Milestone	New Time Thingy	Assigned to Snapier L.	Dec 20
Message	From a test.	Posted by Wade F.	Dec 20
To-do	KNOOP DOES work I know. From scratch.	Assigned to Anyone	Dec 20





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What the hell is
a Story Point?



Backlog

Board

QUICK FILTERS: Configuration Copywriting Backend Dev Frontend Dev Design General

VERSIONS

- All issues
- HubSpot Integration
- Planning & Strategy
- Content
- Email
- Special
- Social
- Infrastructure/Core Infrastructure
- Infrastructure/Theme Infrastructure
- Infrastructure/Navigati on
- Alumni/Submit Donation
- Marketing Automation

CBU002 | Develop Backlog 32 issues

Start Sprint

Linked pages

CBU-75	View a list of profiles (Success Stories)	Alumni/Success Sto...	N	4
CBU-77	View a single profile (Success Stories)	Alumni/Success Sto...	N	4
CBU-78	Download single issue PDF	Alumni/Distinction ...	N	2
CBU-77	View a list of past issues	Alumni/Distinction ...	N	4
CBU-428	Book a Faculty	General/Campus	N	0.5
CBU-428	Course Video Sample	Programs/Single Co...	N	2
CBU-428	Department Tuition Page	Programs/Single Sc...	N	2
CBU-428	How to Navigate	Alumni/Hon. Degre...	N	0.5
CBU-427	Approvals	Art Gallery/Subpages	N	0.5
CBU-428	Restrictions	Art Gallery/Subpages	N	0.5
CBU-428	Exhibition Application	Art Gallery/Subpages	N	0.5
CBU-428	Purchase Media Reproductions	Art Gallery/Subpages	N	0.5
CBU-428	Community Outreach	Art Gallery/Subpages	N	0.5
CBU-77	View contact information	Art Gallery/Landing ...	N	2
CBU-78	View info	Boardmore Playhou...	N	2
CBU-78	Booking Map	Boardmore Playhou...	N	0.5

Cape Breton University | CBU-75

View a list of profiles (Success Stories)

Estimate: 4

Description

As a Visitor
I want to view featured donor profiles
So that I can see other generous donors

Acceptance Criteria

- List view of donors
 - Linked Donor name
 - Donor image
 - Donor content excerpt
- List view pagination
- Page Content

Implementation Details

- Donor profiles should be a custom post type (donor-profile)
- Pagenavi for pagination with 10 posts per page

Comments

Comment

There are no comments

Backlog Board ▾ ⬆️

🔍 QUICK FILTERS: Configuration Copywriting Backend Dev Frontend Dev Design General

VERSIONS

- All issues
- SEO
- Funnel Offers
- Blog
- Email
- Social
- Special
- Website & Online Store
- HubSpot
- Strategy & Planning
- Issues without epics

👤 👤 N ...

- AH-288** Email Automation - Abandon Cart Sequence Email 👤 10
- AH-289** TCF - 10% - Natural Health Enthusiast's Guide to O Funnel Offers 👤 10
- AH-290** TCF (working) - 10% - Natural Health Enthusiast's Funnel Offers 👤 2
- AH-488** Ascenta Spark Pre-Launch Sign Up Special 👤 2
- AH-297** Homepage CTA "What Product is right" - F Website & Online St... 👤 2
- AH-288** Social Strategy & HubSpot Implementation Social 👤 15
- AH-288** Content Twitter is removing @AscentaHealth account (not Social 👤 1
- AH-297** 8.2.15 - Top 5 Store Items (Image & with infographic) Blog 👤 3
- AH-288** F&D Feed Reviews Website & Online St... N 👤 2
- AH-488** Search Strategy, Content & PM Strategy & Planning 👤 2

▼ **April 2015** 8 issues 11 35 5

01/Apr/15 12:28 PM • 30/Apr/15 12:28 PM Linked pages

👤 👤 ...

- AH-488** @Commerce Account Emails Email 👤 5
- AH-297** Store / Site Refinements Website & Online St... 👤 30
- AH-325** 8.2.15 - 10% - Top 5 Store Items & Benefits for Natural Health Blog 👤 3

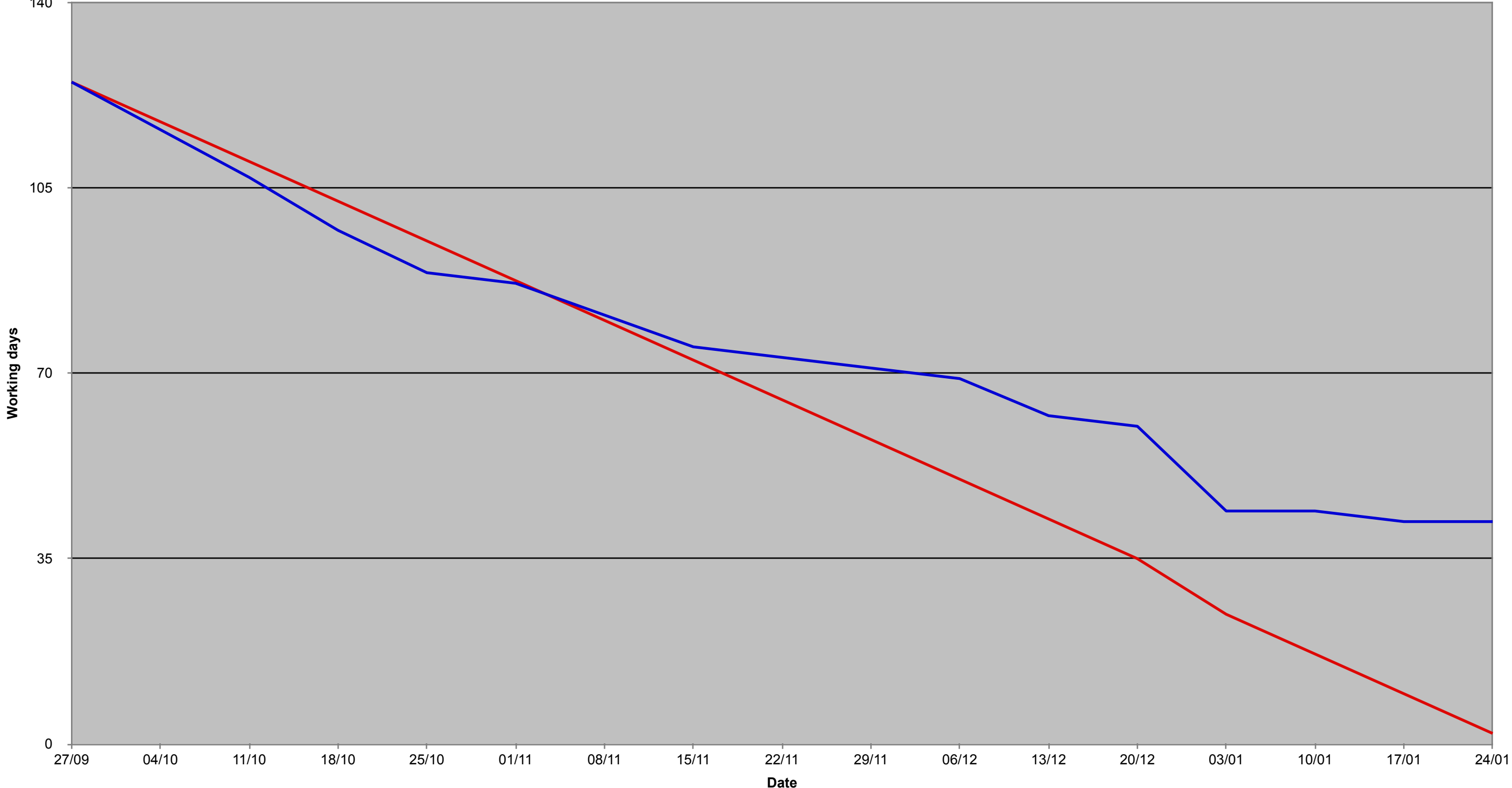
Ascenta Health / **AH-288** ☰ ×

Email Automation - Abandon Cart Sequence

Estimate: 10

- 👤 **AH-383** Write 3 hour follow up email INTERNAL RE... ✎ ×
- 👤 **AH-384** Write 24 hour follow up email INTERNAL RE... ✎ ×
- 👤 **AH-385** Write 1 week follow up email INTERNAL RE... ✎ ×
- 👤 **AH-386** Client approval on emails TO DO ✎ ×
- 👤 **AH-387** Set up emails and configure workflow TO DO ✎ ×
- 👤 **AH-494** Writing brief DONE ✎ ×

Remaining work (days) for project X phase Y





A few Kula *tweaks to Scrum*

Backlog

QUICK FILTERS: Configuration Copywriting Backend Dev Frontend Dev Design General

VERSIONS

- All issues
- SEO
- Funnel Offers
- Blog
- Email
- Social
- Special
- Website & Online Store
- HubSpot
- Strategy & Planning
- Issues without epics

+ Create issue

4 issues Estimate 19

Backlog 13 issues Create Sprint

AH-427	Storage & Resources Section	Website & Online St...	8
AH-428	Email Automation - Product Re-purchase / Re-engagement	Email	12
AH-429	Social Media Training with Ascenta Social Staff	Social	5
AH-430	LinkedIn - Ascenta Spain Canada Launch (Part 1)	Special	20
AH-431	LinkedIn - Kula Health - Subscribers Kula Money Summary	Special	20
AH-432	LinkedIn - Sports Nutrition - Ascenta Sport Nutrition (Part 1)	Special	20
AH-433	LinkedIn - Budget Lineup - Research article profiles of	Special	20
AH-434	HubSpot Training	HubSpot	0
AH-435	HubSpot Template Pack	HubSpot	0
AH-436	HubSpot Template Pack	HubSpot	1
AH-437	TSP - "How to make" infographics	Funnel Offers	0
AH-438	Client Services		1
AH-439	Pub Med - US		5

+ Create issue

Ascenta Health | AH-428

Email Automation - Product Re-purchase / Re-engagement Sequence (Top 2 Products)

Estimate: 12

Sub-Tasks Create Sub-Task

Issue Key	Summary	Status	Actions
AH-429	Product #1 - Email #1 Copy	BACKLOG	edit delete
AH-430	Product #1 - Email #2 Copy	BACKLOG	edit delete
AH-431	Product #2 - Email #1 Copy	BACKLOG	edit delete
AH-432	Product #2 - Email #2 Copy	BACKLOG	edit delete
AH-433	Product #1 Workflow Configuration	BACKLOG	edit delete
AH-434	Product #2 Workflow Configuration	BACKLOG	edit delete

Browser tabs: cdn2.hubspot.ne, Becoming an Agi, Dan Mangan | Sy, Yeti Cycles, CH The Chronicle He, Mountain bike ne, Time tracking or, Jeff

Browser address bar: https://kulapartners.atlassian.net/secure/Dashboard.jspa

Browser bookmarks: Blogs, bookmarks, Twitter, GApps Setup, CM, FlickrAS, UG: Tabs, Kula, KulaDS, Sunlife, Forecast, GA, Courier, MOZ OSE, Dashboard, Logins

JIRA Navigation: Dashboards, Projects, Issues, Tempo, Service Desk, Agile, Create, Search, Tools

System Dashboard

User Timesheet

18/May/15 - 24/May/15
Jeff White [Administrator]

Filter Results: * Internal Reviews Assigned

T	Key	Project	Summary
	W017	Orthodontics	Wirefram

1-1 of 1

Assigned to Me

Projects

Clients

Create Issue

Configure Fields

Project* -- Apple Tech (PT) --

Issue Type* Story ?

Some issue types are unavailable due to incompatible field configuration and/or workflow associations.

Summary | People | Schedule | Estimate | Attachments

Story Bucket: None

Story Points:

Story Point Allocation:
Portion of Story Points from the parent Story allocated to this sub-task.

Business Value Bucket: None

Business Value Points:

Original Estimate: (eg. 3w 4d 12h) ?
The original estimate of how much work is involved in resolving this issue.

Remaining Estimate: (eg. 3w 4d 12h) ?
An estimate of how much work remains until this issue will be resolved.

Create another

Scorecard

Scorecard / Dashboard
Ship Rate

Start: 2015-02-02 End: 2015-03-15 Update

Dashboard

Ship Rate

Upcoming Workload

Team	Overdue	Due	Target	Shipped	Ship Rate
Design	17.0	635.5	652.5	769.75	118.0%
Development	55.0	542.0	597.0	495.0	82.9%
Inbound	133.0	725.0	858.0	818.5	95.4%
Unknown	0	0	0	0	0.0%
Project Management	7.0	12.0	19.0	17.0	89.5%
Marketing	0	25.0	25.0	0	0.0%
Total	212.0	1939.5	2151.5	2100.25	97.6%

Backlog

Board

QUICK FILTERS: Configuration Copywriting Backend Dev Frontend Dev Design General

- VERSIONS
- All issues
 - Insiders
 - Website Optimization
 - Funnel Offers
 - Blog
 - Intern
 - Events
 - Social Media
 - Lead Gen
 - PPC
 - Case Study
 - Podcast
 - Guest Blogging

Backlog 64 issues Create Sprint

KMKTG-548	Roll out new email templates and workflows	2
KMKTG-461	Propagating	
KMKTG-464	Sales Training & Channel Webinars	
KMKTG-198	Tiger for infographics	Funnel Offers 3
KMKTG-257	Insiders Post #1 - How to Put the Insiders in Sales & Steps to Turn Your Sales Team into and onboard Sales Team	Insiders 8
KMKTG-152	Kula Onboarding Process	Funnel Offers 2
KMKTG-211	Kula Email Workflow - 8 valuable resources	Lead Gen 6
KMKTG-275	Create 'Our Methodology Page'	Website Optimization
KMKTG-283	Lead Scoring - Launch with 8 Step Email Marketing	Lead Gen
KMKTG-263	Drishvans Case Study	Case Study 6
KMKTG-401	Content by 10 Steps for Guest Post Opportunities	Blog 3
KMKTG-444	Jira Setup - Marketing Planning	Strategy 8
KMKTG-272	ContentHub Campaign	Lead Gen
KMKTG-446	Ongoing HubSpot Channel Initiatives	HubSpot Channel 3
KMKTG-456	Blog Post	
KMKTG-447	Company Wide Internal org Profile	HubSpot Channel
KMKTG-70	Internal Marketing Resource Calculator	Funnel Offers 12
KMKTG-213	Internal Marketing - Interactive Workflow	Funnel Offers 6



Implementing Agile *for your agency*

How Projects Really Work (version 1.5)



How the customer explained it



How the project leader understood it



How the analyst designed it



How the programmer wrote it



What the beta testers received



How the business consultant described it



How the project was documented



What operations installed



How the customer was billed



How it was supported



What marketing advertised



What the customer really needed

hs_backlog.numbers - Edited																							
Meetings		Decisions		Commitments		Risks		Project Data				Burndown Chart											
A	B	C	D	E	F	K	P	U	Z	AE	AJ	AO	AT	AY	BD	BI	BN	BU	BZ	CE	CJ		
1	hide this row	Project: Project X phase I				27/09	04/10	11/10	18/10	25/10	01/11	08/11	15/11	22/11	29/11	06/12	13/12	20/12	03/01	10/01	17/01	24/01	
2		IT Team Tasks				days remaining	125	116	107	97	89	87	81	75	73	71	69	62	60	44	44	42	42
3	hide this line					1	6	11	16	21	26	31	36	41	46	51	56	61	68	73	78	83	
4	hide this line	Number of consultants: 1.5				125.0	117.5	110.0	102.5	95.0	87.5	80.0	72.5	65.0	57.5	50.0	42.5	35.0	24.5	17.0	9.5	2.0	
5		Task description	Responsible	Status		1000	928	852	776	708	696	644	596	584	564	552	492	480	352	348	336	332	
6		Requirements Component	7 days	In progress																			
7	Status	Project Requirements Gathering	Campbell	In progress	32	24	24	24	24	24	24	24	16	16	16	16	8	8	8	8	8		
8	Not started	Formal Requirements Documentation	Campbell	In progress	24	24	24	24	24	24	24	24	16	16	16	16	16	8	8	8	8	8	
9	In progress	MultiVue Configuration Component	2 days	Not started																			
10	Completed	Append Additional Demographics	Campbell	Completed	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
11		SAP Component	60 days	In progress																			
12		Design SAP Database	Campbell	Completed	16	16	12	12	8	4	0												
13		Creation of the SAP Database	Campbell	Completed	24	24	24	12	12	12	8	8	0										
14		Create stored procedures on SAP database	Campbell	Completed	40	40	32	20	20	20	12	0											
15		Creation of SAP .NET Component	Campbell	Completed	104	64	40	32	8	8	0												
16		Creation of SAP Web Application	Campbell	Completed	64	64	64	52	52	48	24	0											
17		Creation of Security Administration Site	Campbell	Completed	40	32	24	16	0														
18		Secure Messaging	Campbell	Completed	40	32	24	16	0														
19		Security Integration	Campbell	Completed	24	16	8	0	0														
20		SAP system testing	Campbell	Completed	40	40	40	40	40	40	40	32	32	24	24	24	24	16	16	16	16	16	
21		SAP System Verification	Campbell	In progress	16	16	16	16	16	16	16	16	32	32	32	32	32	16	16	16	16	16	
22		Bug Fixing / Cosmetic Changes	Campbell	In progress	40	40	40	40	40	40	40	40	40	40	32	24	24	24	16	16	16	16	
23		Install in Live Environment	Campbell	In progress	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
24		Go Live Support	Campbell	Not started	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
25		General Project Component	25 days	In progress																			
26		Project Management	Hubert	In progress	144	144	128	120	112	108	104	100	96	92	88	84	80	72	68	64	60	60	
27		System Documentation	Campbell	Not started	24	24	24	24	24	24	24	24	24	24	24	24	24	24	24	24	16	16	
28		User Documentation	Campbell	Not started	32	32	32	32	32	32	32	32	32	32	32	32	32	32	32	32	32	32	
29		BizTalk 2004 Component	31 days	Not started																			
30	Resources	Extend ePEX-3 Adaptor	Campbell	In progress	40	40	40	40	40	40	40	40	40	40	40	32	32	16	16	16	16	16	
31	Campbell	Extend Swift Adaptor	Campbell	Completed	40	40	40	40	40	40	40	40	40	40	40	40	40	0	0	0	0	0	
32	Hubert	Extend Upstream Schemas	Campbell	Completed	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	
33	Jan	Create AIC schema	Campbell	Completed	8	8	8	8	8	8	8	8	8	8	8	8	8	0	0	0	0	0	
34	Jan/Mark	Create Mappings	Campbell	In progress	24	24	24	24	24	24	24	24	24	24	24	16	16	8	8	8	8	8	
35	Mark	Create SAP AIC	Campbell	Completed	64	64	64	64	64	64	64	64	64	64	64	24	24	16	16	16	16	16	
36	Mike	Unit Testing	Campbell	Completed	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	
37		Integration Documentation	Campbell	Not started	24	24	24	24	24	24	24	24	24	24	24	24	24	40	40	40	40	40	
38																							
39																							
40																							
41		Product Owner Tasks				27/09	04/10	11/10	18/10	25/10	01/11	08/11	15/11	22/11	29/11	06/12	13/12	20/12	03/01	10/01	17/01	24/01	
42	keep hidden	Task description	Responsible	Status	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	Mon	
43		Design tasks		In progress																			
44		Data mapping: Swift to SAP	Mark	Completed																			
45		Data mapping: ePex to SAP	Jan	Completed																			
46		Data mapping: Care History to SAP	Jan/Mark	Completed																			
47																							
48		Training preparation		In progress																			

- Kula | JIRA
- Kula | BitBucket
- Kula | Confluence
- Kula | Hipchat
- Kula | Bamboo
- Kula | Basecamp
- Kula | Scorecard
- Configure...

Dashboard

03/May/15
 [Administrator]

Filter Results: * Internal Reviews Assigned to Me

T	Key	Project	Summary	Due
	AH-555	Copy Facebook posts	Copy Facebook posts (~16 posts)	03/May/15

1-1 of 1

Assigned to Me

Projects

Clients

...
...
...
...
...

Activity Stream

Kula Partners

- Today
- Laura Hawkins** created AH-555 - Schedule facebook postS (~16 posts)
Just now Comment Watch
 - Nicole Knickle Hatt** resolved AERIS-884 - Mockup Creation as 'Implemented'
Just now Comment Watch
 - Nicole Knickle Hatt** opened AERIS-454 - Mockup Creation
Just now Comment Watch
 - Laura Hawkins** created AH-554 - Facebook post copy (~16 posts)
Just now Comment Watch
 - Laura Hawkins** created AH-553 - Schedule tweets (~26)
1 minute ago Comment Watch
 - Nicole Knickle Hatt** updated the Parent Issue of AERIS-800 - Internal Page Client Revisions
1 minute ago Comment Watch
 - Laura Hawkins** created AH-552 - Tweet copy (~26 tweets)
1 minute ago Comment Watch
 - Nicole Knickle Hatt** updated the Parent Issue of AERIS-889 - Internal Pages: FE DEV
2 minutes ago Comment Watch
 - Nicole Knickle Hatt** changed the Summary of AERIS-889 to 'Internal Pages: FE DEV'

Agile Agency



Does this sound familiar?

- You have trouble planning, estimating and prioritizing work
- You struggle to meet deadlines and forecast realistic delivery dates
- You often invest more effort than you planned to complete deliverables
- You worry that you're not producing stellar results for your clients
- You're unable to react quickly enough to capitalize on new opportunities
- You lack clear metrics and insight with respect to how your team is performing
- Your business is growing faster than your team can keep up

If so, we can help.

Limbr is a boutique consultancy dedicated to helping inbound marketing agencies deliver better results in less time using Lean and Agile techniques. We have deep experience applying Agile in an agency environment, and know first-hand how to tackle the unique needs of an inbound shop.

Unlike other Agile consultants, we don't believe in superficial, one-size-fits-all training workshops. Instead, we embed within your team in order to first truly understand your business and the challenges you face, and then lead the charge in transforming your practices and driving real gains in efficiency and effectiveness.

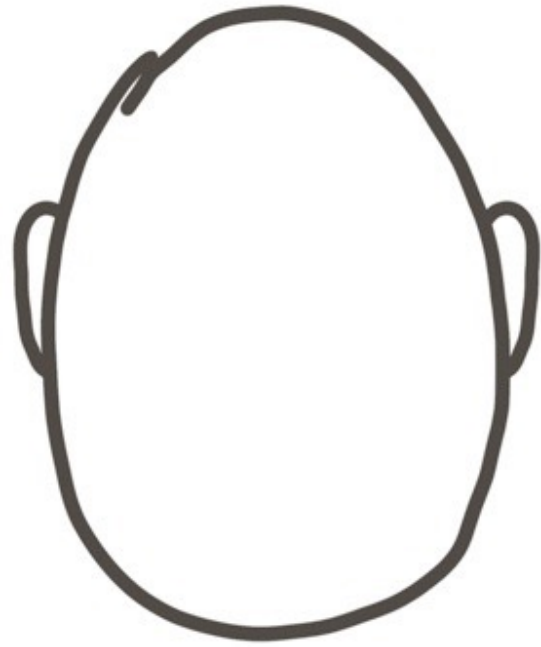
We can help you:

- ✓ Manage projects, programs and portfolios with a simple and flexible framework
- ✓ Organize your team structure to foster collaboration and maximize output
- ✓ Optimize your processes to reduce waste and eliminate bottlenecks
- ✓ Improve initial quality and minimize rework
- ✓ Adopt methods for more accurately estimating and prioritizing work
- ✓ Keep tabs on project progress and profitability
- ✓ Better understand your team's capacity, utilization and production
- ✓ Consistently measure operational effectiveness
- ✓ Roll out and manage software tools to support your new processes

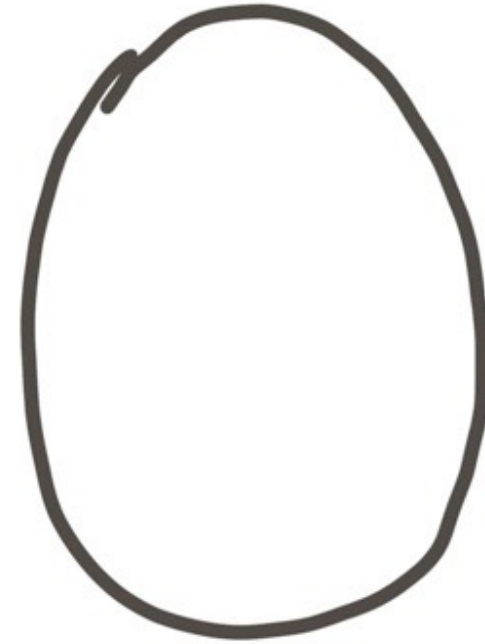
To find out how, get in touch today and book your **FREE** one-hour consultation!

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<http://content.kulapartners.com/agile-agency>



people
matter.



objects
don't.