



## From *Client-Driven* to *Value-Driven*: **HOW SILVERLINE COMMUNICATIONS PUT AGILE MARKETING IN ACTION**

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Marketing and communications teams thrive on disruption and innovation, but constantly navigating unpredictability and rapidly changing priorities can challenge even the highest performing teams. Seeking a change, Silverline Communications partnered with Excella to improve their focus and agility through Kanban, a highly visual management method suited to the continuous, fluid workflows of non-IT teams. Silverline's Agile marketing transformation began with a surprising mindset shift and outcome: when value drives decision-making, both clients, and team, are happier.

## Client-Driven Marketing and Communications

For Silverline Communications, clients are not just customers, they're partners. President and founder Laura Taylor started Silverline in 2009 to collaborate with likeminded B2B companies developing protective, non-invasive technologies in the healthcare, energy and cyber tech spaces.

For many years, a client-driven mindset fueled Silverline's success, but as the company grew, competing requests and unclear priorities created challenges. Laura found it difficult to anticipate staffing needs and predict delivery, while the team struggled with a fast-paced services model that was adaptive at best and reactive at worst. Something had to change if the small agency was to grow and maintain the exceptional service their clients loved.

## Seeking a Sustainable Solution

The team wanted a management solution that could grow and adapt with them. They loved the energy and excitement of agency work, but craved a sustainable, grounding process. Silverline identified several key areas for improvement:

1. **Enhance delivery tracking.** Simple spreadsheets ("project trackers") tracked deliverables for clients, but lacked key insights about delivery in real-time. Requests were erratic, priorities shifted, work could be disrupted or delayed – project trackers didn't provide a full picture.



*We were process nomads, always looking for a process, but never finding one.*

– Laura Taylor, Silverline Communications  
President and Founder

2. **Clearly articulate value.** For many clients, marketing was a mystifying art. The team worked hard to delight clients, but they struggled to articulate the value of dynamic marketing activities for their scientifically-minded clients.
3. **Better prioritization.** Unclear priorities led to frequent context switching, which diminished productivity and output. The team needed to improve prioritization to ensure they focused on the most valuable items.
4. **Streamline workflow.** The number and variability of projects created a complicated workflow. The team lacked clarity and insight into where bottlenecks were occurring, whether teammates had bandwidth or were at capacity and burnt out.
5. **Improve communication, planning and organization.** The team communicated frequently, but not always effectively. They needed to plan longer timelines even as they executed on short-term deadlines.

## The Art of Marketing Meets the Science of Kanban

After contacting Excella, the team began to work with Chris Tomassian, an Agile coach with experience coaching non-IT teams. The team discussed work styles, processes and overall needs with Chris to determine the right Agile approach. The team initially considered Scrum, a popular Agile framework, but needed greater flexibility to handle disruptions and fluctuating deadlines.

Enter [Kanban](#), a management method that uses visualization and work-in-progress limits to help teams balance customer demands with capacity to deliver. Kanban naturally resonated with the team – they saw their transformation as an evolution, they were enthusiastic about continuous improvement. Kanban's emphasis on managing workflow (not workers) to maximize the flow of value made sense to them. They were ready to jump in.

## Kanban: Flexibility, Clarity, Feedback

With Tomassian's help, the team incrementally transformed their work processes over four months, creating new policies and eliminating impediments that had long hindered them.

As the team gained confidence, Tomassian gradually stepped back from daily activities. The team developed a Kanban system that included key Lean and Agile practices:

- **Daily Stand-up:** Daily 15-minute meeting to review the board, plan the day's work, sync up on efforts and ensure people get help with impediments.
- **Kanban Board:** Centrally located, physical visualization of the workflow.
- **Kanban Cards:** Customized cards with space to briefly describe value, time delivery estimate, team members involved, start date, completed date, status, and priority level.
- **Explicit Policies:** Team ground rules that clearly define work processes.

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We went from  
striving to meet  
requests to make  
our clients happy, to  
striving to add value  
in everything we do,  
and as a result, make  
our clients happy.

– Silverline Team Member

”  
We needed a  
method to our  
madness – Kanban  
is that method.

– Laura Taylor, Silverline Communications  
President and Founder

- **Team Retrospective:** End of the week, hour-long meeting to discuss ways to improve process and performance.
- **WIP (work-in-progress) Limits:** Maximum number of work items that can be in a specific lane of the workflow at any time based on projected capacity.
- **Kanban Metrics:** Card data inputted into a spreadsheet generates graphs visualizing key data points, including: lead time (time between commitment and completion dates), cycle time (time between start and completion dates), throughput (number of cards moving through workflow), and more.

## Value-Driven Communications and Marketing

As the team gradually evolved, many outcomes from their transformation were obvious – new business processes, greater insight into the team's capacity and workflow. But the team's greatest change was invisible – a pivotal mindset shift toward value that informed everything from how they made decisions to how they envisioned their business and client relationships.

More than six months since partnering with Excella, here's how Silverline's new mindset has powered their Agile marketing transformation:

- 1. Better insights.** Why was a project pushed back? What were they dropping to meet a new request? With greater insight into their work, the team can answer these questions at a moment's notice. The board provides real-time visualization of the team's delivery and workflow, while stand-up keeps everyone informed of emergency items, blocked or at-risk items, and important updates. Data collected from the board tracks team performance and responsiveness that can be shared with clients and used for improvement.
- 2. Transparency reveals value.** Because the team struggled to capture time and effort on projects, they could not dynamically reflect value to their clients. Now, with the visibility of the board and cards, the team is more accountable to themselves and clients. Transparent work process, recording and sharing data (e.g., lead and cycle time) with clients shows the immense value clients are receiving. By making their value more visible, Silverline is also helping clients visualize the connection between marketing activities and business outcomes.
- 3. Value-centric prioritization.** With value driving decisions, the team can more easily prioritize their work and focus on the work with greatest impact. Using the daily stand-up and weekly retrospective meetings, the team has more opportunities to prioritize their backlog and elevate concerns or delays. Short descriptions

on each card describing the value the client gains for the work, also helps the team and clients prioritize work.

- 4. A workflow that works for everyone.** In Kanban, individuals self-assign work from the backlog once they are ready to actively work on them. Silverline's self-organization gives junior team members greater ownership over their work and enables Laura to step back from day-to-day management. The team's WIP limits have been key to preventing overload, helping the team manage workflow, reinforce collaboration, and ensure predictable delivery.
- 5. Improved communication and collaboration.** The team's feedback loops (board, stand-up and retrospectives) have improved communication while decreasing the total number of hours spent in weekly meetings. The team uses these opportunities to clarify and reinforce priorities based on value, identify bottle-necks, and to help or get help when they need it.

### The Last Word

The jump from client-driven to value-driven marketing has unlocked the potential of the small but mighty Silverline team. With Kanban, the team has found more ways to deliver and share their value with clients and clients have had more opportunities to gain insights into their communications and marketing activities. For Silverline, putting Agile marketing into action began with a transformative mindset shift, but maintaining and improving their agility never ends.

### About Us

Excella is an Agile technology firm helping Washington, DC's leading organizations realize their future through the power of technology. We work collaboratively to solve our clients' biggest challenges and evolve their thinking to help them prepare for tomorrow. Together we transform bold ideas into elegant technology solutions to create real progress.

Learn more at [www.excella.com](http://www.excella.com).

