ELLE WILSON

- Project Case Studies & Portfolio -

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ABOUT ME

I'm Elle Wilson, Marketing Technology Consultant, Certified Scrum Master and Technical Project Manager who works with remote teams administering CRM, CDP, and CMS software.

I've worn many hats, all of which can be summarized as being the bridge between stakeholders and dev teams in improving processes, creating solutions to increase work production, and launching great products and campaigns.

I believe agile frameworks can be applied to not just engineering production cycles, but also in other organizational areas where projects can be ambiguous in the beginning, volatile, and complex. Projects outlined in my portfolio showcase the outcomes of the work I led where either myself or my team has used an agile framework to achieve production goals.

I welcome opportunities to chat in detail about your projects and how I can help you succeed.

CONNECT WITH ME
linkedin.com/in/ewilson110

BOOK A CONSULT
calendly.com/ellegetsitdone

SKILLS AND CERTIFICATIONS

Consulting Areas of Focus

- CRM, CDP, and CMS implementation
- Contact data migration and management
- Marketing technology platform administration
- Retention marketing strategy

My Certifications

- Certified Project Manager (PMP)
- Certified Scrum Master (CSM®)
- Agile Project Management
- Jira Cloud Agile Project Management

MARTECH STACK

Part of my work includes the administration of technologies marketing teams use to manage contacts, automate workflows, and execute campaigns. This is a list of different software I'm often hired to manage projects in:

CRM: Customer Relationship Management
- Tech: HubSpot, Braze, Iterable, Salesforce

CDP: Customer Data Platform
- Tech: Segment, Amplitude, Simon Data, Snowflake

CMS: Content Management System
- Tech: WordPress, Sitecore, HubSpot CMS, Squarespace

ESP: Email Service Platform
- Tech: SendGrid, Klaviyo, Constant Contact, Convert Kit

MAP: Marketing Automation Platform
- Tech: Zapier, Salesforce Marketing Cloud, Pardot

MPM: Marketing Performance Management
- Tech: Looker, Google Data Studio, Tableau

WHAT I DO

Vision: I own the strategic vision for the technologies used for marketing purposes, articulating the “what” and “why” in driving execution.

Leadership: Acting as a servant leader for marketing technology projects, removing organizational impediments, clearing dependencies where needed, and working with teams to improve production processes.

Roadmap: I partner with teams to create and align the tech roadmap to the vision, outlining goals, milestones, and tasks to achieve those milestones.

Backlog: As both the project manager, I own the project backlog with ongoing refinement throughout the project lifecycle, using stakeholder input, developer insights, and the project scope to make informed decisions.

Scrum: I facilitate daily standups, sprint planning, sprint review, retrospectives, and other project planning meetings as well as coach and train teams.

Vendor Management: I lead the team through the shortlisting process for tech adoption, including RFPs where relevant, renewals, and accessing value.

I've been involved in all phases of the project lifecycle serving in many roles. From 2016 serving as a developer on scrum teams, to 2018 when I was first starting in marketing as a web project coordinator, to 2021 when I led my first sprint as a scrum master, to now serving as both a consultant and technical project manager.

I am fortunate to have been the Lead for several platform migrations that involved upgrading databases, deploying new apps, consolidating digital assets, integrating SDKS and servers, and training teams on how to use their new platforms before handoffs.

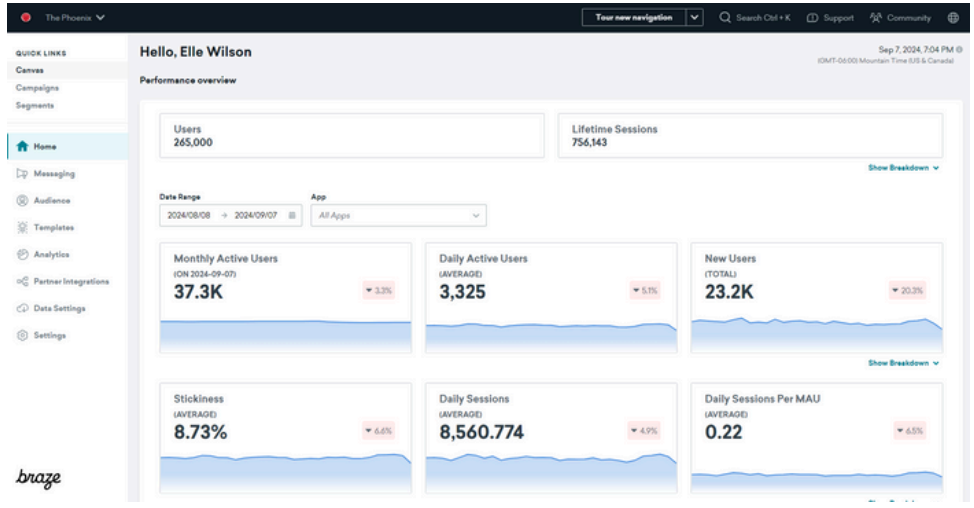
The following slides walk through two of my most recent migration projects involving Braze for The Phoenix, a non-profit that runs a mobile app supporting members on their sobriety journey and Hubspot for Biomeme, a biotechnology company.

DATA & PLATFORM MIGRATION

PROJECT: BRAZE CRM IMPLEMENTATION

Overview

Goal: Setup The Phoenix marketing team's account in Braze, migrate all their member contact data from Constant Contact, and integrate it with the org's mobile app and website.



My Role: I was the Project Manager and CRM lead responsible for leading our implementation team in completing all tasks outlined in the roadmap I created.

Outcomes

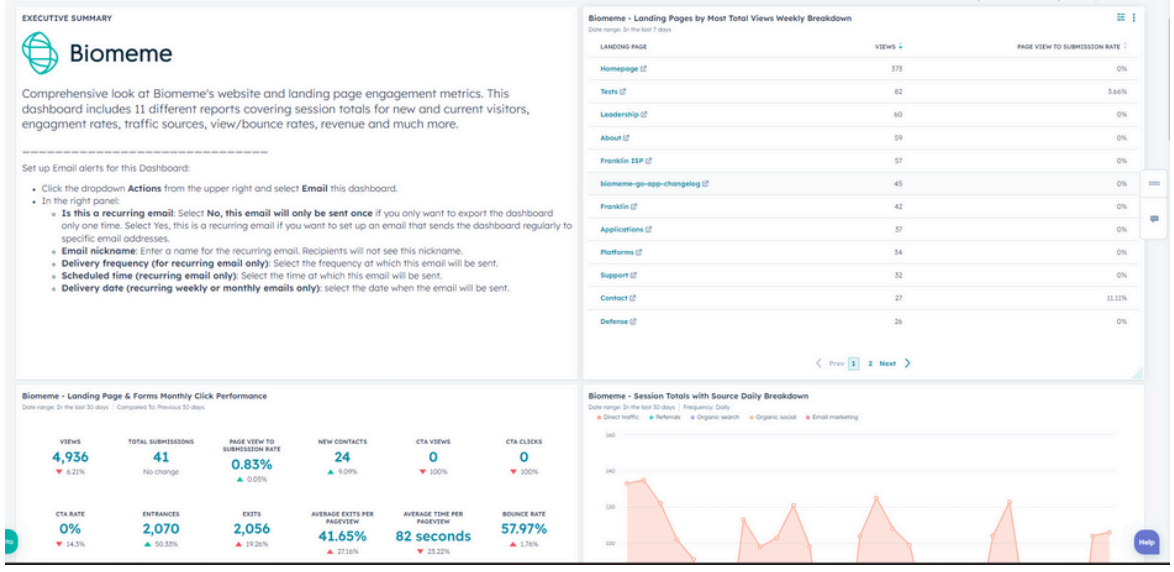
- Migrated 190K member contacts and attributes from Constant Contact to Braze.
- Successfully integrated Braze with The Phoenix mobile SDK and Amplitude to import new members automatically and track events on the mobile app and website.
- Setup both development and production environments for email, push, and SMS.
- Launched The Phoenix first 3 marketing automation journeys 2 weeks ahead of schedule.
- Successfully transitioned the team through onboarding, training, and handoff within 2 months. The members have grown from 190K to 252K since launch.

PROJECT: BIOMEME DATA MIGRATION

Overview

Goal: Import Biomeme's contact database into their new Hubspot CRM account and create a client-facing dashboard to track contact analytics

My Role: Led the contact data migration and execution of tasks including contact data importing, third party integration, and client dashboard creation.



Outcomes

- Successfully imported a database of 5K contacts and 145 partner organizations.
- Created a custom dashboard for Biomeme's team of Hubspot users that allowed them to track contact behavior across 4 different integrated platforms.
- Trained the Biomeme stakeholder team on aligning KPIs wit dashboard metrics, allowing for better decision-making, situational awareness, and collaboration.

AGILE PROJECT MANAGMENT TOOLS I USE

Due to the collaborative nature of my work, choosing the best tool for both the project and team is important. Tools I like to use to manage projects and execute include:

- Asana for roadmap hosting, project planning, and campaign briefing
- Trello for creative briefing, design review, and deliverables
- Jira for scrum board management, backlog handling, sprint planning
- Confluence for documentation, training, QA and reporting on test results
- Smartsheet for IT ticket handling and crossfunctional team collaboration
- AirTable for smart data handling and querying
- Miro for visual white boarding and process mapping

TRANSITIONING TO SCRUM

My background as a web coordinator, web developer, and CMS manager placed me on teams where we used one or more Agile frameworks during the production cycle. I was fortunate that my team at Madison Reed trusted me to lead our transition to using Agile frameworks for marketing based on this past experience.

After starting from scratch with Lean on a department-level, moving to Kanban for creative collaboration, and implementing aspects of XP such as pair programming, our team decided to trial run Scrum with our first Sprint 0 in November 2021. By January 2022, we had fully committed to the process, migrating to Jira to help manage our Sprints.

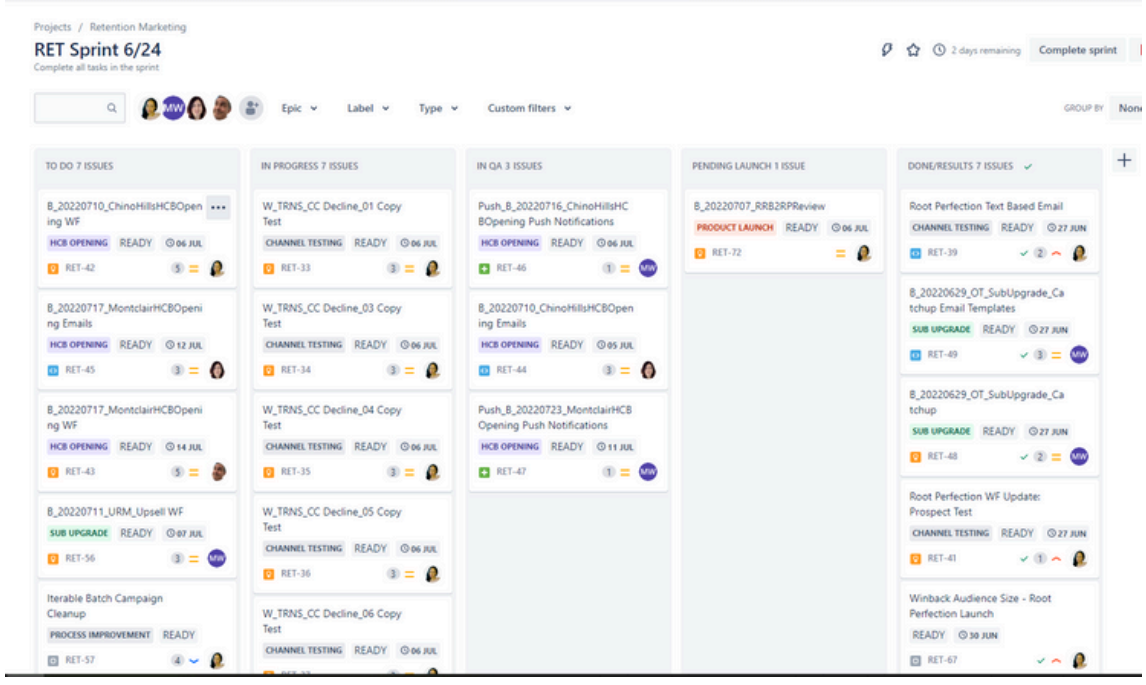
The next few slides go over the case study for the transition and details the two phases of this project.

CASE STUDY: TEAM TRANSITION TO SCRUM

Overview

Goal: Fully commit to using an Agile framework as the Retention team's production process

My Role: Coached the team on adopting an Agile mindset, trained Marketing Automation Specialists, Lifecycle Managers, and contractors on Scrum, and led transition from a 1-week production cycle to a 2-week Sprint cycle.



Organizational Impediments

- Increasing time for development without cutting scope or missing launch deadlines
- Lack of communication from Lifecycle Marketing Managers during development about changes to a project or campaign
- Inadequate training on stages within a Sprint, Scrum team roles, and populating the project backlog

PROJECT: TEAM TRANSITION TO SCRUM

Pilot Project
Sprint 0: 2021 Black Friday Cyber Monday Promo

Preparation
The Retention team was already conducting Daily Standups virtually where they listed their top priorities for the day and any impediments in our team huddles. To address breakdowns in communication, we clearly defined Scrum roles suitable for our team: Lifecycle Managers as Product Owners, the Lead Developer (me) as the Scrum Master, and Marketing Automation Specialists and contractors as the Dev team. I onboarded new team members, training on Scrum, Sprint Planning, QA, and what to expect in Sprint Review and Retrospectives.

Inspect and Adapt
Scope creep was an ongoing concern, so I coached Lifecycle Managers on how to write effective user stories in the project descriptions and began hosting weekly Backlog Refinement sessions with them.

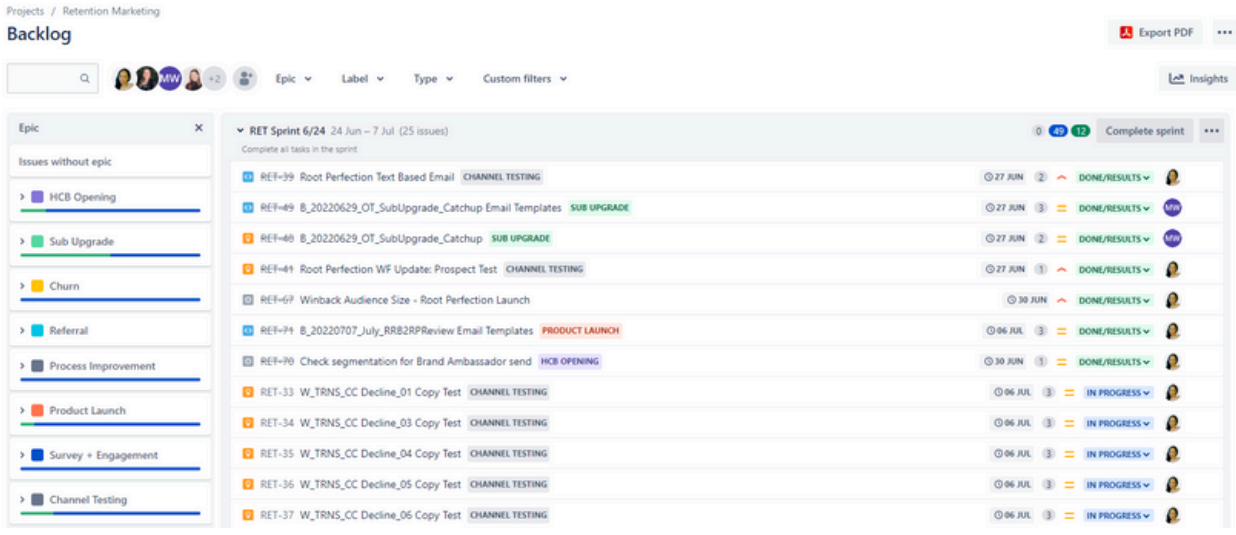
Measure, Assess, Adjust
Originally, Sprint 0 was to be 3 weeks, but we lost a week of production due to scheduling conflicts around the holidays. I tracked story points assigned per Dev team member and worked with collaborative partners to streamline QA and review. We launched the promos on time, earning over $238K in revenue and contributing to 26% of gross holiday earnings.

CASE STUDY: TEAM MIGRATION TO JIRA

Overview

Goal: Move from a Kanban-style platform to one suitable for any Agile framework.

My Role: Built the team's Scrum board, automate it for reporting, and train our Dev team on how to use it within our Sprints



Organizational Impediments

- Buy-in needed from Stakeholders within the Marketing department who were expected to contribute information needed to write effective user stories
- Collaboration partners used other platforms outside of the Atlassian catalog of products we contracted with (Jira, Confluence, Bitbucket)
- Responsibility of administering projects in Jira required additional resources and training
- No documentation on how the team would handle story point estimation, tracking frequent iterations in workflow builds, and reporting burndown and velocity charts

PROJECT: TEAM MIGRATION TO JIRA

Pilot Project
Jira Service Management Setup

Preparation
The Retention Team had been using a Kanban-style board in Trello and agreed that Jira had all additional features needed for collaboration. Several 1:1 sessions to get buy-in and multiple trainings on the platform were conducted. I collaborated with the company's Senior CSM to fine-tune our setup based on feedback I received in these sessions in ensuring the platform migration would be seamless.

Inspect and Adapt
Methods were outlined for backlog items prioritization, story-pointing, communicating with stakeholders about project progress, and tracking team capacity and velocity for more accurate time estimation. I integrated the Jira Scrum board with Confluence for documenting processes, Sprint summaries, and burndown charts to make these accessible by Scrum team members, department Stakeholders, and Organizational Leaders.

Measure, Assess and Adjust
The Jira Migration was completed April 2021. Out of the 68 story points given per 2-week Sprint, we carry a average burndown between 61-64. We also increased our completion rate from 78% to 97% since the migration.

IMPROVING TEAM PROCESS

What went wrong in this sprint? is a popular question asked during Sprint retros and one of my favorites. It allows me to listen to feedback, identify impediments, and think of ways we can either modify our process or implement new agile ones for more sustainable development.

The next few slides highlight new processes I created with 3 goals in mind:

1. **Implement changes using feedback collected**
2. **Address and remove impediments in productivity**
3. **Increase work efficiency**

The most important step in these type of projects is making sure the team I work with feels comfortable with improvements. I do so by being responsible for effectively training team members, creating documentation for them to reference, tracking progress over trial runs, and observing how process changes affect production over time.

PROJECT: QA + TESTING PROTOCOL

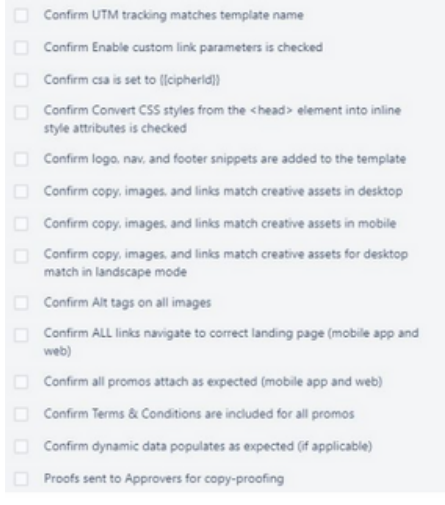
Overview

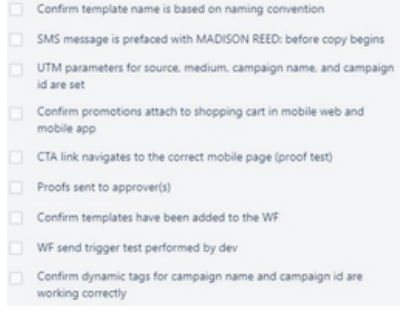
Goal: Decrease the error rate in automated workflow builds and template code prior to deployment by creating a new QA protocol that addresses more complex builds.

My Role: Created new protocols for each marketing channel used in production, wrote and automated standard tests used for campaign launches in Jira, and trained team members on the new protocol for reviewing builds before launch.

Outcomes

The QA completion rate increased from 65% to 98% since the new protocol was released. Error rate on automated workflows reduced to 3% or less on average down from 8%.

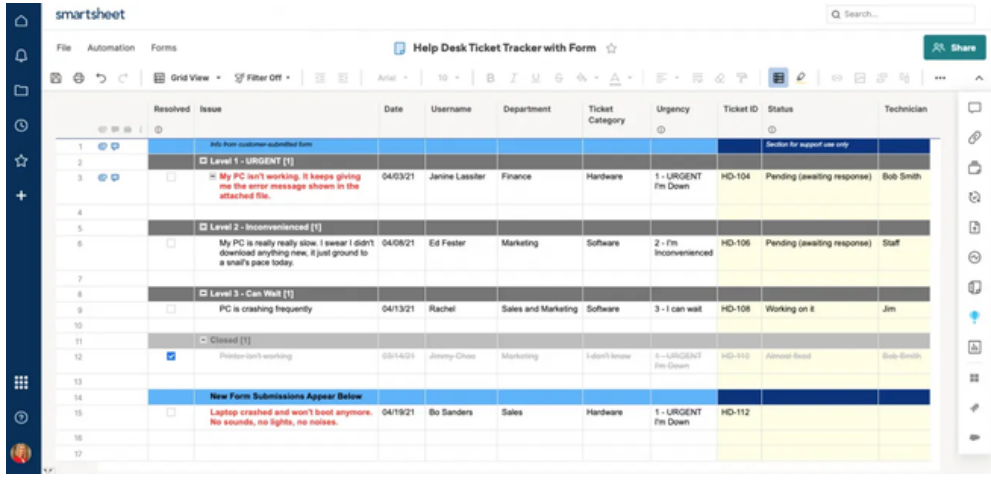




PROJECT: ASCENSION HEALTHCARE WEB TICKET MANAGEMENT SYSTEM

Overview

Goal: Speed up the response time for handling new web page requests to support the company's CMS migration.



My Role: Created an in-house ticketing system for documenting web page request submissions and trained Web team on how to use it.

Using Smartsheet software, I created a web form that records web page requests and automatically assigns a web coordinator to the request upon being submitted. The form records the request and the assigned web coordinator in a single web sheet. After training the Web team, we were able to launch with the new system in Summer 2019.

Outcomes

Response time on completed requests was reduced from 1 month or more to less than 10 days on average.

CREATING NEW SYSTEMS

Agile is useful because it provides frameworks for delivering value in industries with high degrees of uncertainty, risk, and competition — like Marketing!

In Retention Marketing specifically, keeping customer churn rate low is crucial, requiring strategy to build loyalty throughout the customer lifecycle. It's not enough for teams to have stellar digital assets to use in marketing, they must also create systems where continuous change is expected.

The following case study goes over Email Modular Design (EMD) systems I created for two companies and showcases the companies' use of several **SAFe Lean-Agile Principles.**

The systems allowed for frequent iterations of design while reducing time and resource costs, helping these companies to prioritize strategy in an ever-changing industry.

CASE STUDY: 4 SAFe LEAN-AGILE PRINCIPLES USED IN EMD SYSTEM CREATION

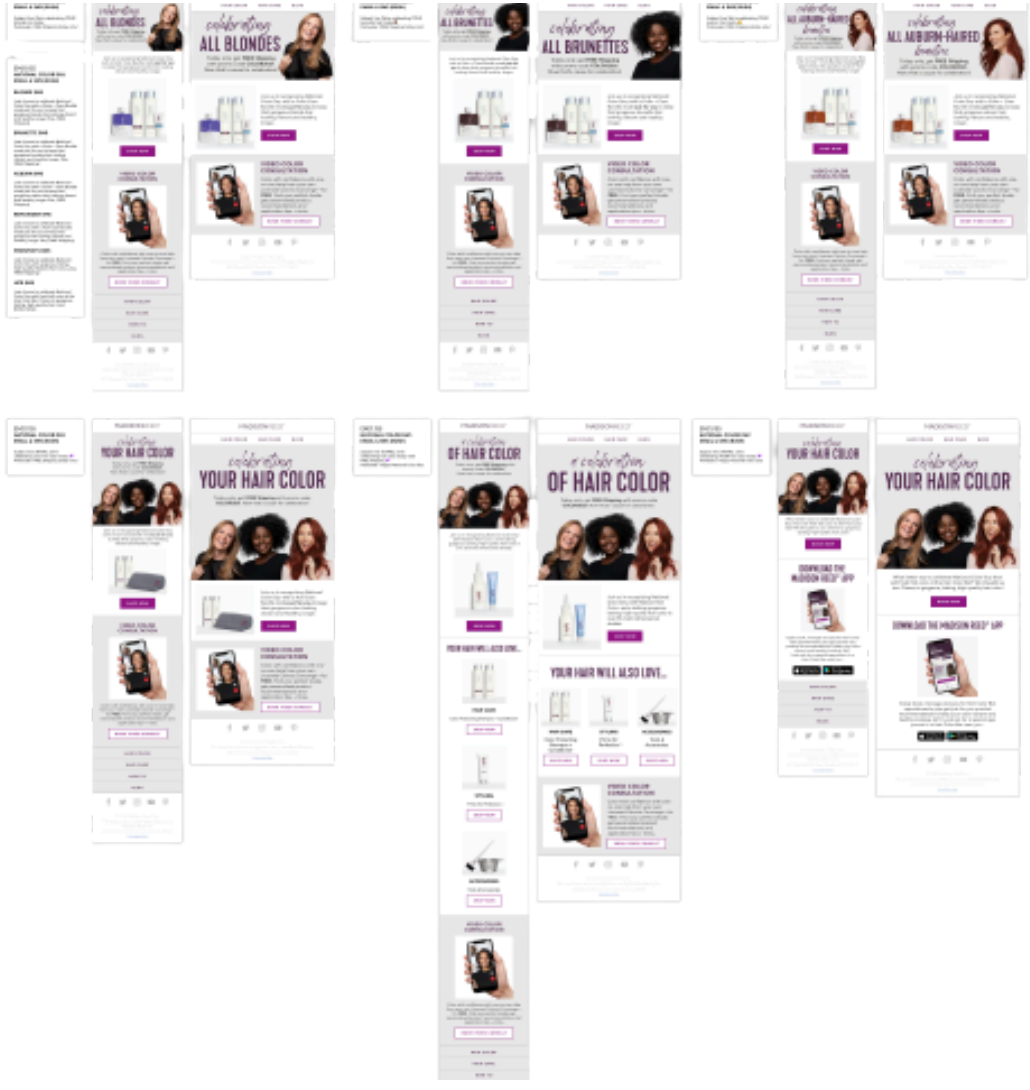
Taking an economic view
Goal: Delivering the best value in email marketing using the shortest, most efficient time. This required a system teams could use that could be scaled without increasing operation and development costs. I created email modular design systems to address that need.

Applying systems thinking
Email modular design is the method of creating a system of self-contained, reusable modules for developing custom email templates. Modules can be assembled and rearranged to build a variety of templates.

Building incrementally with fast, integrated learning cycles
Teams use EMD systems because it allows templates to be built or rebuilt quickly and on demand while staying consistent with the company's brand.

Organizing around value
EMD systems also allow for time better spent strategizing, experimenting, optimizing, and innovating unique value for the customer.

PROJECT: MADISON REED EMD SYSTEM



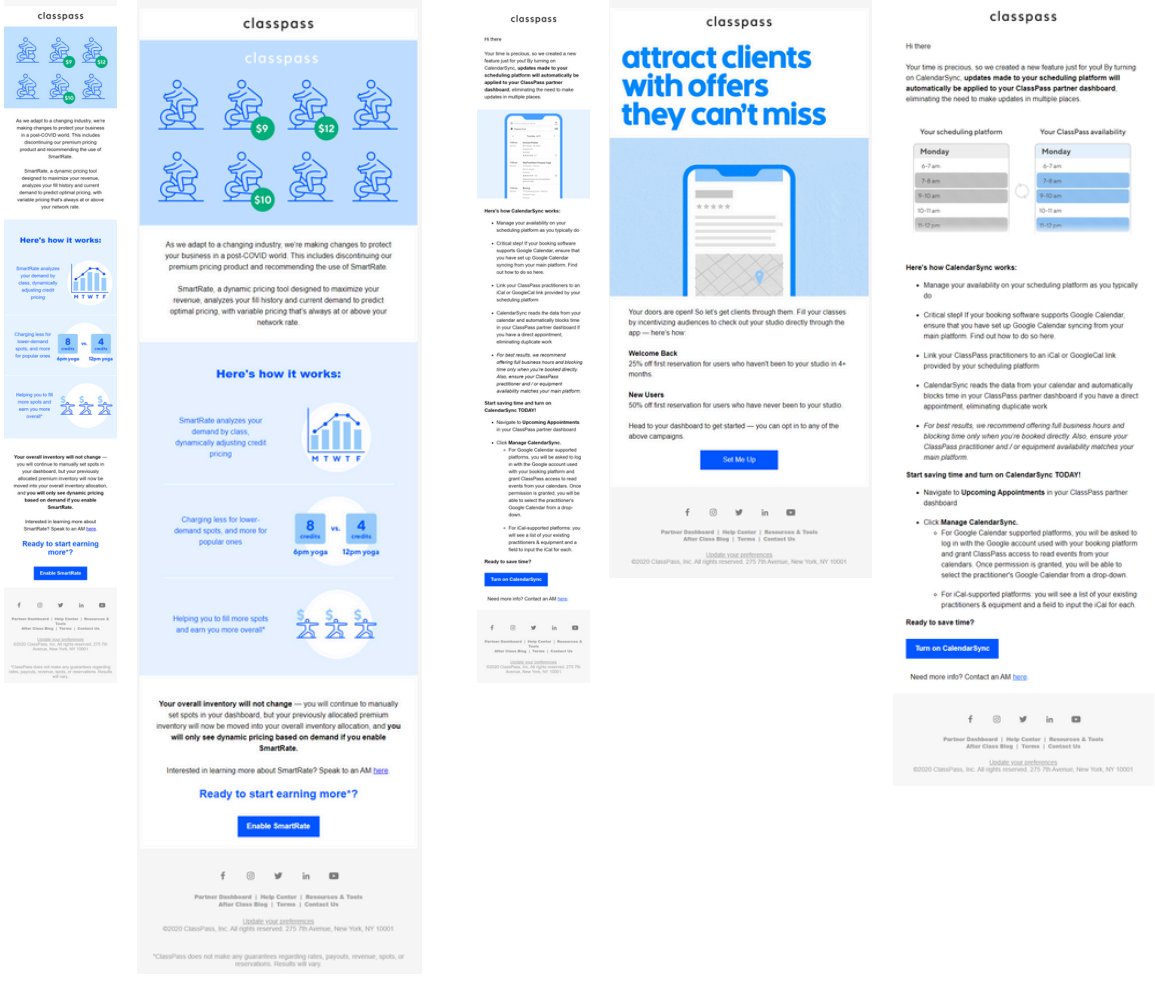
Overview

- My Role: Created a 20-module and component system for promotional and transactional emails in lifecycle workflows
- System houses code component library, design pattern and style guidelines, and developer docs

Outcomes

- Reduced time spent on email development from a 4-day turnaround to same day
- Saved money used on contracting out design and coding services
- Improved brand consistency and scalability

PROJECT: CLASSPASS EMD SYSTEM



Overview

- My Role: Created a 16-module and 10-template system for promotional emails placed in B2B partner and mobile app lifecycle workflows
- System houses code component library, templates, and style guidelines

Outcomes

- Reduced time spent on email development from 1 week turnaround to 48 hours
  30% increase in email engagement

LET'S WORK TOGETHER

The best way to get started working with me is by scheduling a discovery call:

calendly.com/ellegetsitdone

Feel free to also say hi via email: elle@ellegetsitdone.com