



The
Zulu Method

THE LEADING AI-NATIVE B2B MARKETING AGENCY

FREE GUIDE

MARKETING OPERATIONS · PLAYBOOK

How You Should **Actually Run** Your Marketing Ops

9 rules. 3 phases. A tight operating system for B2B marketing teams.

9

RULES

The exact mechanics, failure modes, and how to run each one.

3

PHASES

Structure, Discipline, Scale.
Skip a phase, lose the system.

2

TEMPLATES

Sprint planner and retro
template, printable and ready.

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20+ years in B2B GTM. Five stints as VP Marketing or CMO. Four SaaS startups. AI-Native Marketing Pioneer. Founder, The Zulu Method.

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WHY THIS GUIDE EXISTS

Most marketing teams aren't running tight ops. They're running fire drills with good PR.

After 20+ years leading different marketing teams across four SaaS startups and five VP or CMO stints, I've watched the same pattern repeat. Teams run hard and ship little. Leaders spend their Mondays rebuilding the priority list they rebuilt last Monday. Everyone stays busy. But nothing compounds.

The fix is an operating rhythm the team follows. Not true Scrum. Not agile theatre. A marketing-native sprint framework where priorities carry weight, ownership has teeth, and work has a clear path to done.

This guide is an overview of the system I've optimized across multiple teams. **Nine rules through three phases.** Each rule earns its place because skipping it breaks the system. Each phase compounds on the one before.

Read it once. Run the first two-week sprint inside the next seven days. Iterate on the ceremonies as you go. The rhythm sets in by sprint three. Customize. Optimize. Make it your own. Your team (and leadership) will thank you.

PHASE 01

Structure

Build the operating rhythm. The cadence, ceremonies, and board.

PHASE 02

Discipline

Hold the line on sizing, ownership, and carry-over. This is where sprints break.

PHASE 03

Scale

Compound through comms norms, automation, and retros with teeth.

PHASE 01

Structure

Build the operating rhythm. Without these three, nothing else compounds.

1 Run 2-Week Sprints

WHAT

The whole team plans, executes, and closes marketing work on a strict 14-day cycle. No exceptions for individual projects. No monthly planning pretending to be a sprint.

HOW TO RUN IT

Start every sprint on a Wednesday. Close it the Tuesday two weeks later. Every work item belongs to exactly one sprint. The board shows only the current sprint. Future work sits in a clearly labeled backlog.

⚠ Teams running “rolling priorities” end up with a permanent backlog nobody trusts, work in flight nobody remembers picking up, and pivots becoming political instead of operational.

2 Lean Sprint Ceremonies

WHAT

Three ceremonies, three timeboxes. 15-minute daily standups. Sprint planning every other Tuesday. Retro every other Wednesday morning. The whole rhythm.

HOW TO RUN IT

Standup is three questions per person, 90 seconds each. Shipped yesterday. Shipping today. Blocked on what. **Planning** ends with every item sized and owned. **Retro** names what worked, what did not, and important actions for next sprint.

⚠ The hour-long daily standup where everyone reports to the VP. The two-hour planning session debating an email subject line. Both are your sprint ceremonies collapsing. Never allow these.

3 One Board, One Truth

WHAT

Every work item lives on one board, in one tool, with one structure. Asana, Monday, ClickUp. Pick one and commit. Every item carries owner, size, dates, and a channel tag.

HOW TO RUN IT

Organize by channel so the VP reads the board in 30 seconds and knows what is moving in email, paid, content, events. Status updates happen on the board, not in standup and not in Slack threads.

⚠ Hybrid tracking is the silent killer. Shared spreadsheet plus Slack threads plus a Notion page the VP maintains personally. The official board quietly becomes decorative.

PHASE 02

Discipline

Hold the line on sizing, ownership, and carry-over. Discipline is where sprints break.

4 T-Shirt Sizing Only

WHAT

Every work item gets sized XS, S, M, L, XL. The whole sizing system. No story points. No hours. No days-of-effort estimates.

HOW TO RUN IT

XS is under half a day. **S** is one day. **M** is two to three days. **L** is one week. **XL** does not go in a sprint, it gets broken down first. Anything over **L** is decomposed into **M**-and-under pieces before scheduling.

⚠ Fibonacci debates. Forty minutes of planning arguing whether a blog post is a 5 or an 8. The number was never the point. The shape of the work was.

5 Set Hard Rules Upfront

WHAT

Three non-negotiable sprint rules, stated in the first planning session and enforced forever. Everyone updates their own work. Unfinished items carry over with an explanation. Done means DONE, including QA, review, and published.

HOW TO RUN IT

Pin the rules to the board. Read them at planning every time. Enforce without exception. If a rule stops working, change it at retro. Do not quietly ignore it.

⚠ Soft rules are the biggest sprint killer. "Try to" and "we should" break under the first deadline. Firm rules survive hard weeks.

6 Appoint a Board Czar

WHAT

One person owns the integrity of the board. Not as a job title, as a rotating role. The Czar runs the ceremonies, keeps the board clean, and enforces the three hard rules.

HOW TO RUN IT

Assign at the start of each quarter. The Czar is the referee, not the boss of the sprint. They flag missed updates, dirty cards, unsized items, retro actions never shipped. Rotate on a 90-day cadence. Frame as an honor.

⚠ Shared ownership of operations is a polite phrase for no ownership. "Our board is kind of a mess" means nobody woke up feeling responsible for fixing it.

PHASE 03

Scale

Compound through comms norms, automation, and retros with teeth.

7 Board-First Comms

WHAT

The board is the primary system of record. Slack is color commentary. Email is for stakeholders outside the team. Commitments only count if they live on the board.

HOW TO RUN IT

State the norms explicitly. Board for commitments, sizing, status, decisions. Team Slack channel for execution chatter during the day. Cross-functional channels for stakeholders. When a decision happens elsewhere, log it on the board within 24 hours.

△ Marketing teams drift toward Slack-native operations because Slack feels fast. Six weeks later, nobody finds the Q2 paid campaign decision because the thread scrolled out of memory.

8 Lean on Automations

WHAT

The sprint tool does the repetitive admin for you. Unfinished items carry over automatically. Subtasks close when parents close. Channel-tag filters generate stakeholder views with no manual reporting. Retros pre-populate from the board.

HOW TO RUN IT

Build automations in priority order. First carry-over. Then status pings on stalled cards. Then subtask closure. Then channel-filtered views. Last, retro prep. Review quarterly. Kill the ones nobody uses.

△ Every manual ritual your system requires is a tax you pay forever. A VP spending Friday afternoon rebuilding a slide deck is doing work the tool should do.

9 Treat Retros Seriously

WHAT

Retros are where the operating system improves. Every retro produces at most three concrete changes for next sprint, with owners and due dates. Retro actions get their own cards on the next sprint board.

HOW TO RUN IT

45 minutes max. Start with data. Velocity, items completed, items carried, blocker count. Identify three themes. Assign three actions. Each action owned with a due date. If a prior retro action never shipped, name why before committing to new ones.

△ Teams skipping retros sign up to repeat the same failures on a two-week clock. Retros run as therapy sessions with no actions are almost as bad. Retros skipped because “we are behind” are the worst of the three.

How You Should **Actually Run** Your Marketing Ops

9 rules for GTM teams. Clarity over chaos.

PHASE 01

Structure

THE CADENCE

1 Run 2-Week Sprints

- ▶ Long enough for real progress
- ▶ Short enough to force priorities
- ▶ Pivot fast when priorities shift

2 Lean Sprint Ceremonies

- ▶ 15-minute daily standup
- ▶ Planning every other Tuesday
- ▶ Retro every other Wednesday

3 One Board, One Truth

- ▶ Asana, Monday, ClickUp. Pick one.
- ▶ Every item: owner, size, dates
- ▶ Organize by channel

PHASE 02

Discipline

THE GUARDRAILS

4 T-Shirt Sizing Only

- ▶ XS hours, S 1 day, M 2-3 days
- ▶ L is 1 week. XL? Break it down.
- ▶ No Fibonacci debates

5 Set Hard Rules Upfront

- ▶ Everyone updates their own work
- ▶ Unfinished work carries over
- ▶ Done means done. No exceptions.

6 Appoint a Board Czar

- ▶ One person owns board integrity
- ▶ Rotate quarterly
- ▶ An honor, not a chore

PHASE 03

Scale

THE LEVERAGE

7 Board-First Comms

- ▶ Internal Slack for the team
- ▶ Cross-functional for stakeholders
- ▶ Clear norms on what lives where

8 Lean on Automations

- ▶ Carry over unfinished work
- ▶ Auto-close subtasks and pings
- ▶ Saves admin fatigue

9 Treat Retros Seriously

- ▶ Discuss, evolve, log everything
- ▶ Assign actions, ship them
- ▶ Skip retros, repeat mistakes

What this changes: Priorities stop colliding. Ownership gets obvious. Execution tightens. Visibility explodes.

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TEMPLATE 01 OF 02 · FIRST-RUN WORKSHEET

Initial Sprint Planning Worksheet

This is a first-run worksheet to help you plan your debut sprint before your board is set up. Fill it in together as a team, use it to shape your board, then retire it. Every work item gets an owner, a size, and a due date before the sprint starts. No unsized items. No unowned items. No ambiguity about what finishing looks like. From sprint two onward, everything lives on the board directly, not on paper.

SPRINT META

Sprint dates _____ to _____

Board Czar _____ Sprint focus (one line) _____

CHANNEL	WORK ITEM	OWNER	SIZE	DUE

DEPENDENCIES OR BLOCKERS KNOWN AT PLANNING

DEFINITION OF DONE (EVERY ITEM)

- Owner updated the card themselves
- Shipped or published, not sitting in draft
- QA, review, or copy check complete
- Channel tag applied on the board

TEMPLATE 02 OF 02

Sprint Retrospective

Run this for 45 minutes every other Wednesday. Start with the data, name themes, commit three actions max for next sprint with owners and due dates. Close last retro's actions before opening new ones.

RETRO META

Sprint dates _____ **Board Czar** _____

SPRINT DATA	RESULT
Items committed	
Items shipped (to Done)	
Items carried to next sprint	
Average size shipped (XS to XL)	
Unplanned interrupts pulled in	

WHAT WORKED (3 MAX)

WHAT DID NOT WORK (3 MAX)

ACTION FOR NEXT SPRINT (3 MAX)	OWNER	DUE

PRIOR RETRO ACTION	SHIPPED?	IF NO, WHY

START RUNNING IT NEXT WEDNESDAY

Now you know the system. Customize it. Then run it.

The nine rules are not theoretical. I've run this sprint system across teams of two and teams of 20+. It works at both ends. The real work is in the first three sprints, where the ceremonies feel clunky and the hard rules feel harsh. Push through. The rhythm sets in by sprint four, and the big operating efficiencies show up by sprint five.

Start small. Pick your tool. Pick your Czar. Pick a Wednesday soon. Hold the line on sizing and done-means-done. Run retros with hard actions. Everything else is variation on those fundamentals.



About the Author

Hannon Brett is a 5x CMO/VP and 4x Founder bringing 20+ years of B2B GTM and event marketing success to SaaS and tech companies. He's an AI-Native GTM pioneer proving that AI can replace 80% of your marketing execution.

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Want to completely de-risk your **AI marketing evolution?**

The Zulu Method runs on an AI-native platform delivering 6+ core marketing channels at scale. Add a 12+ year senior marketing manager to expertly run every campaign with you, fully deployed in under 30 days. AI execution plus human expertise. Your complete AI marketing evolution in under a month.

BOOK A 30-MINUTE CALL

Or reach us directly at
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