





# SPEED RACERS

**To achieve marketing goals more quickly in a fast-paced business world, B-to-B marketers are increasingly turning to agile marketing. Before rushing in, here's what you need to know**

**BY MICHAEL J. MCDERMOTT**

**W**ith roots in the software development world, agile marketing has a decidedly techie feel to it. Not surprisingly, it appears to be gaining traction fastest among B-to-B marketers involved in the technology sector, but the benefits it offers — defined processes, speed and accountability in the creation of marketing content, and the ability to measure ROI on both internal and external resources expended — have broad appeal. Realizing those benefits, however, requires commitment, patience, and a willingness to overcome both technical and cultural challenges.

In a nutshell, agile marketing disrupts the traditional waterfall approach to achieving marketing goals, where the end result is defined at the outset and the teams tasked with reaching those goals trudge doggedly forward without pausing for course corrections along the way. The disruption is significant. Agile requires a high level of collaboration and cooperation among both internal and external marketing resources, the creation of cross-functional and often ad-hoc teams, greatly increased accountability, and frequent, sometimes daily, project status updates. It's best suited to digital marketing, since its methodology involves rapid deployment and assessment of marketing content, then quickly making changes based on the results. The

ultimate goal is to create marketing that meets or exceeds the expectations of the customer, which can be another department in the organization (often sales at B-to-B companies) or an end user.

“Agile marketing simply reminds all marketers — whether they be B-to-B, B-to-C, or P-to-P — that success is tied to being able to understand customer problems, whether they be overt or latent,” says Eugene Fram, professor emeritus at Rochester Institute of Technology’s Saunders College of Business. “The new wrinkle with agile marketing is that it calls for a series of small experiments to acquire these insights — not waiting for, or depending on, beautifully bound consulting studies or academic research. Social media has brought a Wild West mentality to marketing. It is time to tame the beast through critical thinking via a series of small experiments.”

## TWO POPULAR METHODOLOGIES

The concepts, principals, and values embodied in agile marketing can be operationally deployed through different methodologies, which also have roots in the software development world. Two popular ones are Scrum and Kanban. The primary focus of Scrum is accomplishing tasks in a specified amount of time (a sprint), and it’s generally considered most effective for marketing projects that are finite, have requirements that are simple to define, and will be deployed immediately at the end of the process, says Claire Drumond, a lead growth and content strategist at enterprise software firm Atlassian, who also manages JIRA, the firm’s project management tool.

The basic components of Scrum include:

- Sprint planning, where the team meets to decide what will be completed during the sprint.
- Daily scrum (also known as a “stand-up”), a short meeting to discuss progress and obstacles.
- Sprint reviews, where team members share what they have completed, which promotes transparency.
- Sprint retrospectives, where team members highlight what worked, what didn’t, and how accurate their estimate of the time needed to complete the tasks included in the sprint turned out to be.

Scrum can be challenging for newcomers to agile marketing, experts say, since it demands a lot of changes. Marketing teams have to start working in iterations, collaborating with other departments and/or outside resources, setting and meeting frequent deadlines, and attending daily scrums. “Training is the number one challenge. It’s very hard to wrap your head around this if you’ve never done it before,” says Jeff Julian, CMO at AJi Software, a Kansas City, Mo.-based digital agency and software developer, and author of *Agile Marketing: Building Endurance for Your Content Marketing Team* (Squared Digital,

January 2016). “Then, once you get your teams on board, it’s hard to get buy-in because you’re trying something new. That takes time. Everyone in marketing is so pressured to get everything done right away, so the temptation to just drop it and go back to what you knew before is strong.”

Kanban methodology may be a more accessible introduction to agile marketing because it is less structured than Scrum and can be applied to processes already in place, Drumond says. Where Scrum requires teams to fit tasks to a defined sprint, Kanban works backward from a team’s known or projected capacity to complete tasks. It also differs from Scrum, which relies on defined roles, in that Kanban teams are built around a specific task or project, with an individual (the project driver) responsible for tapping the right people to complete it. Kanban’s main components are:

- List of user stories, which are plain-language explanations of the marketing tasks involved and how they will provide value to the customer.
- Kanban boards, which are tools to help teams visualize their work by using lanes and columns to segment tasks and track their progress.
- Work-in-progress (WIP) limits, which are rules put in place to limit the amount of work to be done based on a team’s capacity.
- Continuous releases, which refers to the delivery of tasks. Teams work on the number of stories stipulated by the WIP limit until completion, moving on to the next as each is completed.

## ACHIEVING TRUE AGILITY

Nomenclature matters less than results, and, in practice, agile marketers often combine elements of both methodologies to create an approach best suited to their individual needs. The overarching goal is to achieve true agility, something marketers of all stripes aspire to, according to CMG Partners’ Sixth Annual CMO’s Agenda. Among marketers surveyed for the 2014 report (a group that included Discover, HP, SAP, Teradata, and other well-known names in both tech and non-tech businesses), 88 percent of those not currently using agile marketing said improving speed-to-market was a priority, and 93 percent of those already using agile said it helped them improve speed-to-market. The ratios were similar across four other business needs queried in the survey: adapt and respond faster, be more productive, identify and prioritize high-impact activities faster, and deliver customer-centric outcomes (see chart, page 7).

Boston-based SmartBear Software, a developer of software quality tools, was an early adopter of agile marketing, launching its program in late 2012. “Our entire marketing organization, more than 25 global



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— GARY DEASI,  
SmartBear Software

# BUSINESS NEEDS ARE MET WITH AGILITY

## BUSINESS NEEDS

### GET TO MARKET FASTER

88% of non-agile users say improving speed to market is a priority.

### ADAPT AND RESPOND FASTER

91% of non-agile users say being able to switch gears more quickly and effectively is a priority.

### BE MORE PRODUCTIVE

96% of non-agile users say making their team more productive is a priority.

### IDENTIFY AND PRIORITIZE HIGH-IMPACT ACTIVITIES

**FASTER** 88% of non-agile users say enhanced prioritization of the things that matter is a priority.

### DELIVER CUSTOMER-CENTRIC OUTCOME

89% of non-agile users say delivering a better, more relevant end-product is a priority.

## RESULTS OF AGILE

**93%** said adopting agile helped them to improve speed to market (ideas, products, or campaigns).

**93%** said adopting agile helped them switch gears more quickly and effectively.

**87%** said adopting agile made their teams more productive.

**80%** said adopting agile led to an enhanced prioritization of the things that matter.

**80%** said adopting agile helped them deliver a better, more relevant end-product.

members, uses agile as our primary process for project planning and management, task assignment, prioritization, and collaboration,” says Gary DeAsi, senior manager of digital marketing and brand. “We use agile to plan, track, communicate, and report on everything we are executing individually and as a team at any given time. If it’s not in the sprint, it doesn’t exist!”

SmartBear’s program is relatively mature by agile marketing standards, and it’s returning significant benefits. The primary advantages DeAsi notes include better prioritization and time management; balancing workloads; breaking down silos and enhancing collaboration among teams; increased visibility, transparency, and accountability; and faster reaction time. “Ultimately, agile helps everyone on the marketing team work more efficiently, both individually and together as a team,” he says.

An important advantage of agile marketing is the ability it provides managers to stay on top of their teams’ workloads. It gives them an accurate sense of which team members have the bandwidth to take on more projects when new tasks and requests are received. “Everyone in our marketing organization has complete transparency to see what everyone else is working on at any given time, from our CMO to the co-ops,” DeAsi says.

When planning its sprints, SmartBear’s marketers use what they call “flex time” and “flex tasks.” It allows them to “plan for the unplannable,” DeAsi quips. “We work in a very fast-paced business, so inevitably there are always going to be some high-priority inbound tasks that we need to jump on and execute, but that you simply can’t plan for.” Building flex time into the sprint gives marketers the ability to pivot on those tasks without dropping other priorities or sacrificing deadlines to which they’ve already committed.

With so many different steps and marketing team members involved in the execution of a single marketing program campaign at SmartBear, it would be easy to run into a “deadly dominoes” situation without agile marketing in place, DeAsi says. “One person missing their deadline results in the next person missing a deadline, then another, etc. Before you know it, you’re in a meeting trying to explain to your executive team why a high-priority initiative is hitting a week or more late,” he says.

DeAsi’s experience with agile marketing at SmartBear has convinced him that a key to success is molding the process to the organization, not the other way around. The initial sprint process the marketing team developed worked very well for the first couple of years, but when the company underwent a major reorganization, it was immediately clear that it would no longer work with the new team structure. “We had to start from scratch and create an entirely new process to fit with how our organization was now set up, but it has since become really effective,” he reports. “Don’t try to fit a square peg in a round hole. Develop a custom process that works for your team and business.”

## BEWARE THE CHALLENGES

Shawn Dickerson, director of solutions marketing at Workfront, a Lehi, Utah–based provider of project management solutions that offers various levels of agile marketing execution options, warns of the mistaken notion that agile marketing is an all-or-nothing proposition. “The only exposure some marketers have to agile is the experience of their counterparts in software development, and the prospect of working the same way engineers do sounds as daunting as it does unappealing,” he says.

Dickerson suggests that marketers new to agile focus on three key aspects: establishing a single request queue, creating a sprint cadence, and adopting a visual representation of work to make the team’s progress visual and public. “Whether the team uses a storyboard in a tool like Workfront or a poster board with sticky notes, the idea is to allow them to monitor progress and adjust timelines and assignments as needed,” he says. →→→

# 10 KEY PRINCIPLES OF AGILE MARKETING

**FIFTEEN YEARS AGO**, a group of software developers got together and created the Agile Development Manifesto, a statement of values and principles they hoped would unite a number of emerging alternatives to traditional software development. The manifesto's ultimate goal was the development of software that is more responsive to customer needs and is delivered on time and with more predictability.

In a 2010 blog post on Chief Marketing Technologist, a site covering the intersection of marketing and technology, Scott Brinker noted that some of the manifesto's values also apply to marketing, and he suggested adopting them and adding others to formulate an Agile Marketing Manifesto:

- Intimate customer tribes over impersonal mass markets.
- Testing and data over opinions and conventions.
- Numerous small experiments over a few large bets.
- Engagement and transparency over official posturing.

Widely acknowledged as one of the leading voices in the agile marketing movement, Brinker subsequently expanded on the Agile Marketing Manifesto with 10 key principles marketers should consider in the adoption of an agile marketing approach:

- 1** Provide remarkable customer experiences. They should meet or exceed the expectations of prospects, customers, and partners in all interactions, from early awareness building and demand generation efforts through life cycle customer service. "The whole *raison d'être* of agile marketing is to better enable the delivery of remarkable experiences to customers," he writes in *Hacking Marketing*, adding that everything else stems from this purpose.
- 2** Respond to change, whether that's deftly handling a social media crisis, leveraging an unexpected opportunity in current events, or simply learning something new, or changed, about your customers or market.
- 3** Remember that individuals and interactions are more important to success than processes and tools. Internal marketing operations should be managed to facilitate better interactions among team members, enabling them to act and react faster and more creatively. Collaboration among internal and external marketing and business groups should be more open and fluid, and process and technology should enhance, not detract from, interactions with individual customers.
- 4** Focus on testing and data, to analyze performance, uncover new opportunities, and dynamically tailor customer experiences.
- 5** Conduct numerous small experiments that leverage the value of testing and data.
- 6** Increase customer collaboration, implicitly via data and testing and explicitly via feedback channels and social media.
- 7** Be transparent. Individual tasks, daily progress, and metrics by which those investments of time and energy are measured are all out in the open. "This can be one of the biggest cultural challenges for some marketing organizations," says John Cass, director of marketing at OnSource Online. "But it's absolutely essential that it be overcome because all the benefits of agile marketing flow from this transparency."
- 8** Use rapid iterations. Taking advantage of data, testing, and numerous small experiments requires rapid production and deployment of marketing concepts.
- 9** Tap direct and indirect sources of feedback to learn how initiatives are performing, and then use rapid iterations to reflect those learnings.
- 10** Break out of silos. This is critical to agile marketing success, says Jeff Julian, author of *Agile Marketing: Building Endurance for Your Content Marketing Team*. "There are so many titles in marketing. The result is an assembly line structure where everything starts to get backed up when someone's out of the office. We have to be able to expand our skill set, just like software developers had to do when everything moved from desktop and server to the web," he says.

— M.J.M

Figuring out where to start is a puzzler for some marketers, says John Cass, director of marketing at Braintree, Mass.-based OnSource Online, a platform of mobile technologies for photo inspection for insurance companies, and a cofounder and organizer of the Boston Agile Marketing meet-up. In his previous job as VP of marketing at the Danvers, Mass.-based digital marketing agency McDougall Interactive, Cass often recommended that clients embracing agile start with customer personas and buying journeys.

"Those are areas many marketers don't spend a lot of time on, but they are great starting points for agile because they are succinct projects in which the whole marketing team can be involved," he says. "There's a beginning and an end, and it's easy for everyone involved to see the value created in these projects."

Brands that have already embraced marketing optimization generally take well to agile marketing because testing is important to both processes, Cass adds.

Another roadblock many marketers face in adopting agile marketing is entrenched corporate culture. "The biggest challenges are people issues," says David Grabel, enterprise agile coach at emergn, a Boston-based global digital business consultancy. "Many people are naturally resistant to change."

But Grabel and other agile marketing proponents agree that the proof is in the pudding and actions speak louder than words in addressing this challenge. "The best way to overcome it is to run a small experiment and show significantly better business outcomes," he says. "Nothing succeeds like success."

William Wickey, senior manager of content and media strategy at LeadGenius, a Berkeley, Calif.-based provider of lead generation and custom data enrichment for B-to-B sales and marketing teams, is successfully using agile marketing with both in-house teams and freelancers. He favors Scrum methodology because he finds it more effective for short-term sprints and managing multiple people. "Most of our campaigns are now queue- or sprint-based, instead of calendarized. This allows us to launch initiatives faster but also have flexibility for delays," he reports.

Like many others who have embraced this fast-paced approach, Wickey is convinced that agile is the future of B-to-B marketing, although it's not quite here yet. "The term 'agile marketing' does not yet have the same traction with B-to-B marketers that 'agile development' has with programmers and engineers, but it soon will," he predicts. "Marketers are now adopting the right tools and processes to put agile concepts into action. It's only a matter of time before agile marketing coalesces into a more formal methodology and is more widely adopted by B-to-B marketers." **B**