

Agile for (and in) Marketing



The future of your Marketing Division is Agile An Agile Business Management Community Whitepaper

There is a growing trend towards business agility; the adoption of agile and lean practices across the enterprise. This is nowhere more evident than in marketing. Marketing divisions across the world have starting to adopt iterative and adaptive processes while encouraging self-organising teams and empowered individuals.

The Agile Business Management Community is a grassroots organisation dedicated to the development and promotion of agile and lean outside IT. Our members are respected professionals in their fields and span the globe.

These are some of our observations and experiences on agile for (and in) marketing.

Organisational Context

Our experience shows that, while organisations vary in scope and culture, there are several commonalities that seem to predispose an agile marketing adoption.

- Agile in marketing division generally starts in either software companies, or companies with a pre-existing investment in agile IT. This can also act as a limiting factor; agile is seen as an "IT thing", with no clear value outside of IT.
- Where marketing does expand outside of IT, it is generally marketing that initiates and drives their own adoption, rather than an outside instruction (pull not push).
- We have had good results from helping companies organise into value streams.
- In general, smaller organisations seem to be more open to adopting agile outside of IT, but larger ones are beginning to take notice. Right now, there are now several major companies using agile marketing practices.
- We see a potential entry point for agile marketing in larger organisations via digital marketing agencies.

The usual caveats apply that agile principles need to be applied to the organisation, not just a single division. Be it marketing or IT. It is still a rare thing for companies to understand deeply enough that Customer Value is the starting point of all lean/agile thinking and actions.

Principles of Agile Marketing

1. The customer is number one: Customer interaction and insights must be at the core of any marketing strategy
2. Plan for change: The ability to quickly respond to change is a source of competitive advantage
3. Collaborative, cross-functional teams: Teams must be structured around campaign and customer requirements, not functional silos (i.e. separating sales from product management, the agency, etc.)
4. Action follows insight: Listen to your customers; both their words and actions to drive good decisions
5. Iterate: Deliver value fast. Build upon success and identify failures through small, short and well planned iterations.



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Alignment to Agile Culture

While cultures within companies vary, there is a natural alignment between the culture in marketing teams and core agile values. The nature of marketing and marketing campaigns promote transparency and clear communication within each team, between teams and to management. Organisations that constrain these natural behaviours (for example introducing silo'd teams and processes) will see the greatest benefit from an agile adoption.

Benefits of Agile in Marketing

Noting that all organisations are different and will have different experiences, we have observed a number of quantifiable and qualitative benefits in those marketing teams that adopt agile. These are, in many cases, very similar to the benefits seen in software development teams adopting agile.

- Most tangibly, some organisations have measured a significant financial benefit. Specifically as defined as a reduced "cost per outcome".
- By reducing sequential organisational silos, agile marketing teams see an overall reduction in process bureaucracy and shorter approval processes enabling the team to work dynamically.
- A flow on benefit is the ability for marketing teams to begin campaigns sooner than they may otherwise have been able. This can be attributed to both reducing silo'd approval processes and leaner (or iterative) techniques.
- With appropriate organisational support, marketing teams are able to experiment with new ideas, respond to opportunities faster and stop poor performing campaigns
- Most marketing teams are constrained by money and time. Marketing teams that have adopted agile techniques are better placed to visualise and prioritise activities within these constraints (though to be fair, that isn't unique to marketing)

Finally, there is a significant support within the agile marketing community; for example there are over 2000 practitioners in the San Francisco region alone.

Practices in Agile* Marketing

No discussion on business agility would be complete without understand which agile practices extend beyond software development to apply to marketing teams and divisions.

1. Value Stream Mapping (while technically a lean practice) of marketing processes supports the team in identifying waste and thus natural candidates for agile transformation
2. Lean Startup techniques, such as pivot and a/b testing, develop a culture of "inspect and adapt" and "fail fast"
3. Kanban boards and related processes help marketing teams visualise and track their activities within the natural marketing cadence, which does not fit neatly within time-boxed iterations
4. Setting a goal (e.g. via a "Plan on a page" or similar) to be ready to harness change rather than defining detailed 5 years plans (that are never met anyway)
5. Persona development to make sure you know who you are targeting and with what message.
6. Customer journey mapping to make sure you know how customers interact with you and how you need to alter your (digital) experience
7. Visual radiators, such as burn-down charts, can be applied to campaign development and reporting.
8. Estimation and planning, such as planning poker and other relative estimation techniques, to define the size and effort of marketing campaigns.

* Note, for our purposes we are treating agile and lean practices as part of the same adaptive business approach.



Discovered Issues

While we have observed many benefits, agile in marketing is not without its challenges. Once again, many of these issues are familiar to the issues faced by agile software teams and can be overcome by good leadership and targeted education.

- In the first instance, without executive support agile marketing will struggle to gain wider acceptance within the organisation.
- Even with executive support, interfaces with non-agile teams will remain an issue.
- Culturally, marketing need to be open to "agility" and incremental outcomes. In many cases the pushback from marketing teams is phrased as "we can't do agile" when they really mean "we won't do agile".
- Similarly, teams need to be pushed to continuously improve. "We've always done it this way" is no excuse to stop improving. This is true even after an agile adoption.
- More pragmatically, marketing teams that emulate the agile practices too closely (e.g. the daily standup) may find that they don't work as effectively. Marketing teams need to understand the difference in the way they work and adapt the practices to fit. For example, the cadence for most marketing work is much longer than a day, so a daily standup may not be as effective.
- On a similar note, marketing teams need to select the frameworks that work best for them. Many teams find that lean processes (e.g. Kanban) are more effective than traditional iterative processes (e.g. Scrum).
- Finally, where agile coaches are used to help marketing teams, they need to be able to "talk the marketing talk". It's not enough to just know agile in the software domain.



Further Reading



<http://agilebusinessmanagement.org/>

<http://agilebusinessmanagement.org/content/intland-%E2%80%93-building-agile-marketing-team>

<http://agilebusinessmanagement.org/content/agile-classical-marketing-teams-short-and-mid-term-benefits>

<http://mikebracken.com/blog/the-strategy-is-delivery-again/>

<http://agilemarketingmanifesto.org/>

<http://www.agilemarketing.net/>

<http://www.forbes.com/sites/jenniferrooney/2014/04/15/applying-agile-methodology-to-marketing-can-pay-dividends-survey/2/>



With thanks to the following Agile Business Management Community members for contributing to this whitepaper.



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As well as writing "Directing the Agile Organisation", Evan currently consults to organisations around Australia and SE Asia on Agile management and governance.



Pat Reed is an experienced Agile executive, coach, transformational leader and trainer with proven success transforming large Agile organizations and developing world class Business Agility processes and practices. Pat has deep domain expertise in enterprise Agile Accounting, PMO, Portfolio Management, Dev Ops, Change, Compliance, Performance Management and Adaptive career processes and practices. She has a proven track record of leading and coaching teams that have transformed Fortune 500 companies.



Brian H. Maskell, President of BMA Inc., has more than 30 years' experience in manufacturing and distribution industry. He has held a variety of management positions from the shop-floor of an electronics company to Manager of European Inventories for the Xerox Corporation to Vice President of Product Development and Customer Service of the Unitronix Corporation.



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