

# Learning to do Agile in Marketing!

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# My Journey

1. Context
2. Challenges
3. Way forward - Overseas Travel  
Journey Moment
4. Lessons



# Context



# Context - Marketing function in large Australian Bank

- Marketing still a silo - and product silos within Marketing
- 200 marketing consultants
- “Segment” and “Programs” teams
- Supporting teams in Delivery, Analytics, Digital
- Had been doing “Agile” for 18 months
- I come from tech - Business Analyst and Agile practitioner for about 10 years




# Work done by the marketing teams



- Manage and develop large marketing campaigns
- Could be product-focused or brand-focused
- Still heavy emphasis on traditional channels TV, radio, print, “Out of Home”



- TV
- Youtube
- Facebook
- Twitter



WHAT DO YOU WANT?



~~We must  
become  
AGILE!~~

Understand  
and respond  
to customers  
✓

Do less of  
low value  
✓

Get  
Feedback  
sooner ✓

Deliver  
faster ✓

Do more  
of high  
value ✓

# Why do Agile in Marketing?

- Need to move away from large, expensive traditional “above the line” campaigns
- Marketing is digital - technology is digital
- Data-driven marketing - test a hypothesis!
- Understand the customer better - customer journeys and moments
- Move away from pushing products to connecting with customers - lifetime value proposition



# LIFE MOMENTS

Life's unpredictable, but your finances don't have to be. We're here to help during every life moment.

## WE'RE THERE FOR EVERY MOMENT



Travel



Home &  
property



Life & family



Work life



Unplanned life  
moments



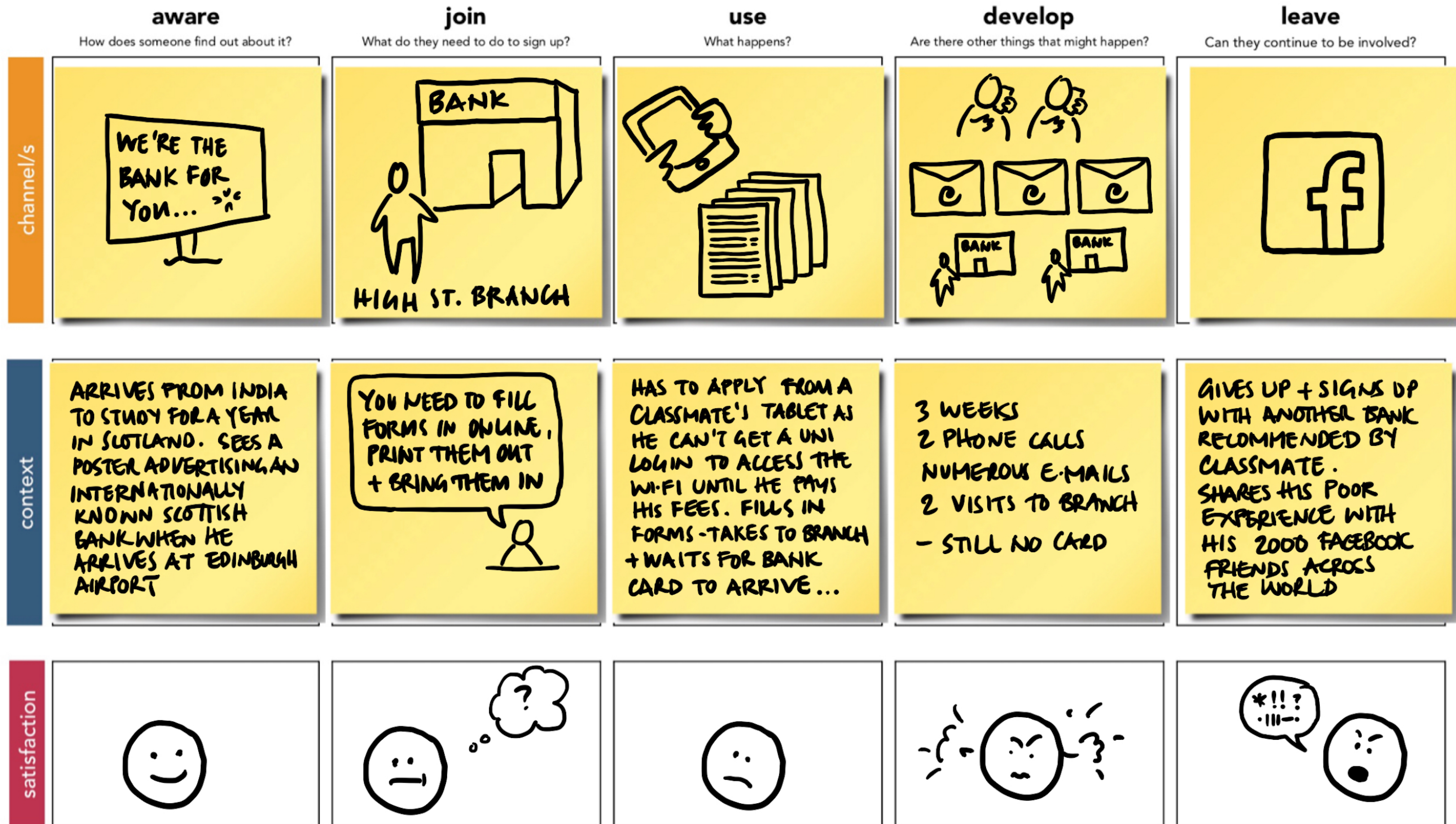
Managing your  
money

# journey map for: OVERSEAS STUDENT OPENING A BANK ACCOUNT

Date: 10.9.15  
 CREATED BY: HAZEL WHITE  
 ORGANISATION: OPEN CHANGE  
 ROLE: USER RESEARCH

A journey map focusses on a service from the user's perspective, using text and visuals.


It helps us see the big picture: both over time and in context. It can be used either to record how things are now, or to think through how things could work in the future.





 Online

 Bank branch

 Call center

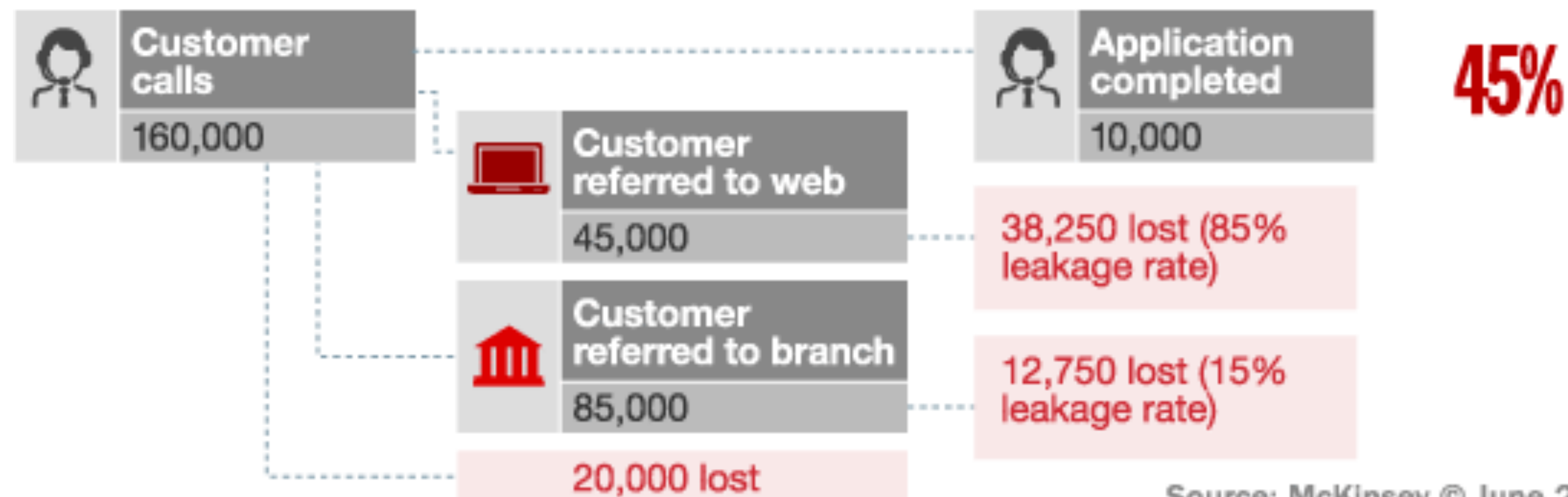
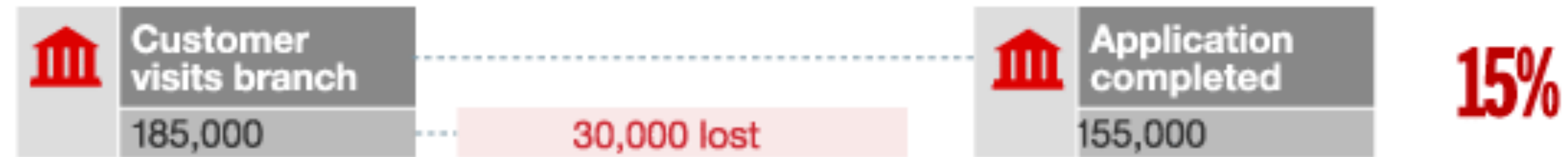


**BUSINESS AGILITY**  
CONFERENCE  
INDIA

**Initial channel**

**Second channels**

**Leakage rate**



Source: McKinsey © June 2014



“

You have to start  
from the point of  
view that no-one  
cares”

Adam Gee, Channel 4

Credit: thereyanschubert

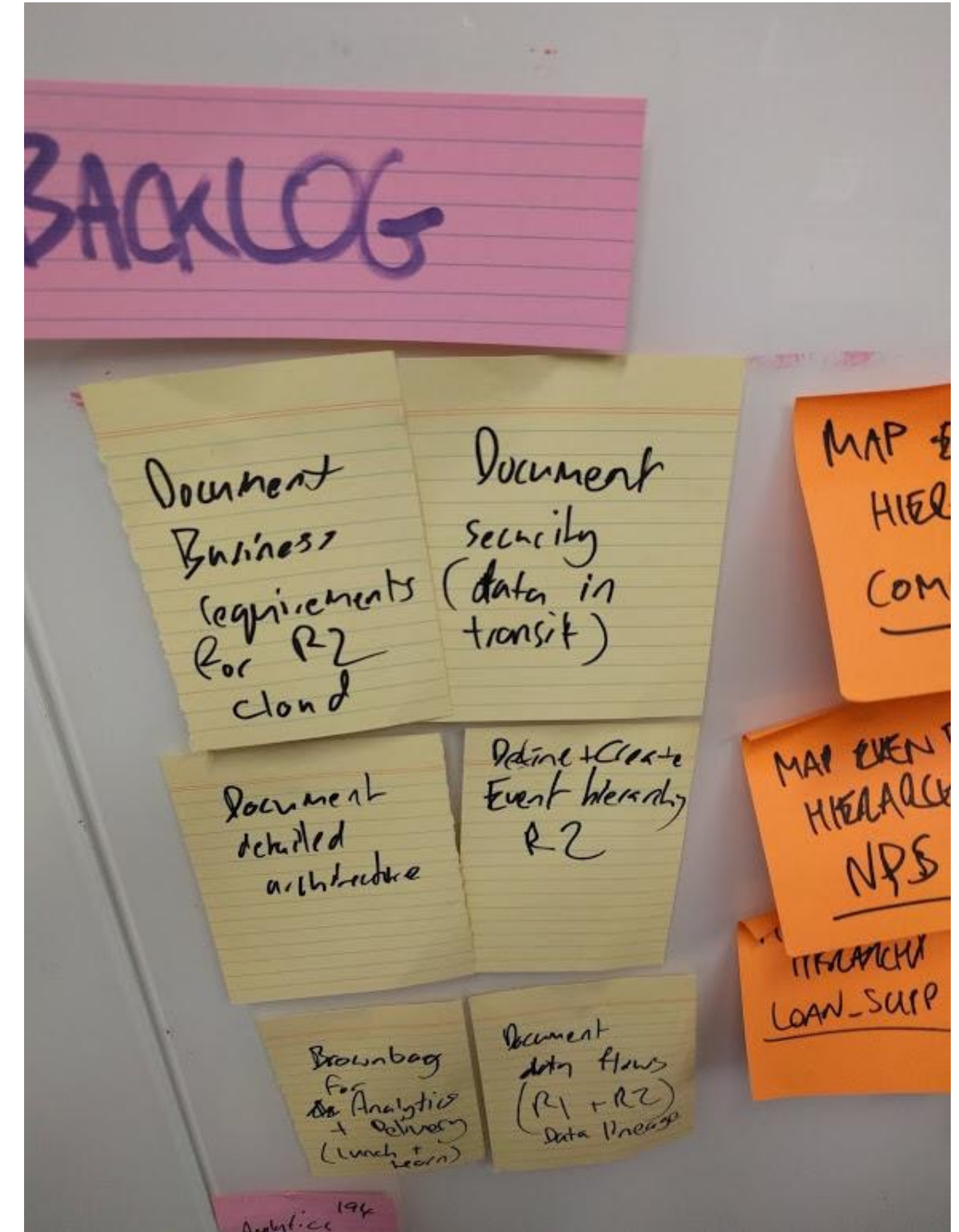


**“You’ve got to start with the customer experience and work backwards to the technology.”**

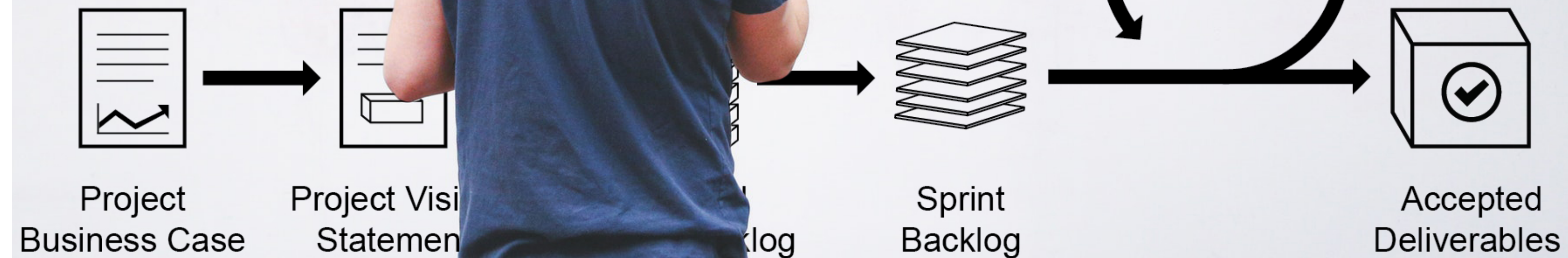
**- Steve Jobs**

# Where we were on our Agile journey?

- Agile broadly supported by teams and management
- Consultants had implemented basic, “traditional agile”
- Agile had demonstrated some benefits (10% staff decrease, but productivity up 20%)
- Management felt Agile could help even more if extended and improved
- Customer journeys and moments



The image shows a person from behind, wearing a blue t-shirt and a red beanie, drawing a Scrum process diagram on a whiteboard. The diagram is titled "PRODUCT DEVELOPMENT STRATEGY WITH SCRUM". It illustrates the flow from a "Project Business Case" (represented by a document icon with a line graph) to a "Project Vision Statement" (represented by a document icon with a 3D box). From there, the process moves to a "Sprint Backlog" (represented by a stack of cards). A circular loop labeled "Create Deliverables" and "Daily Standup" connects the Sprint Backlog back to itself. The final outcome is "Accepted Deliverables" (represented by a box with a checkmark). The person is holding a marker and is in the process of drawing the diagram.



# Agile Software Development vs Agile Marketing

## Software

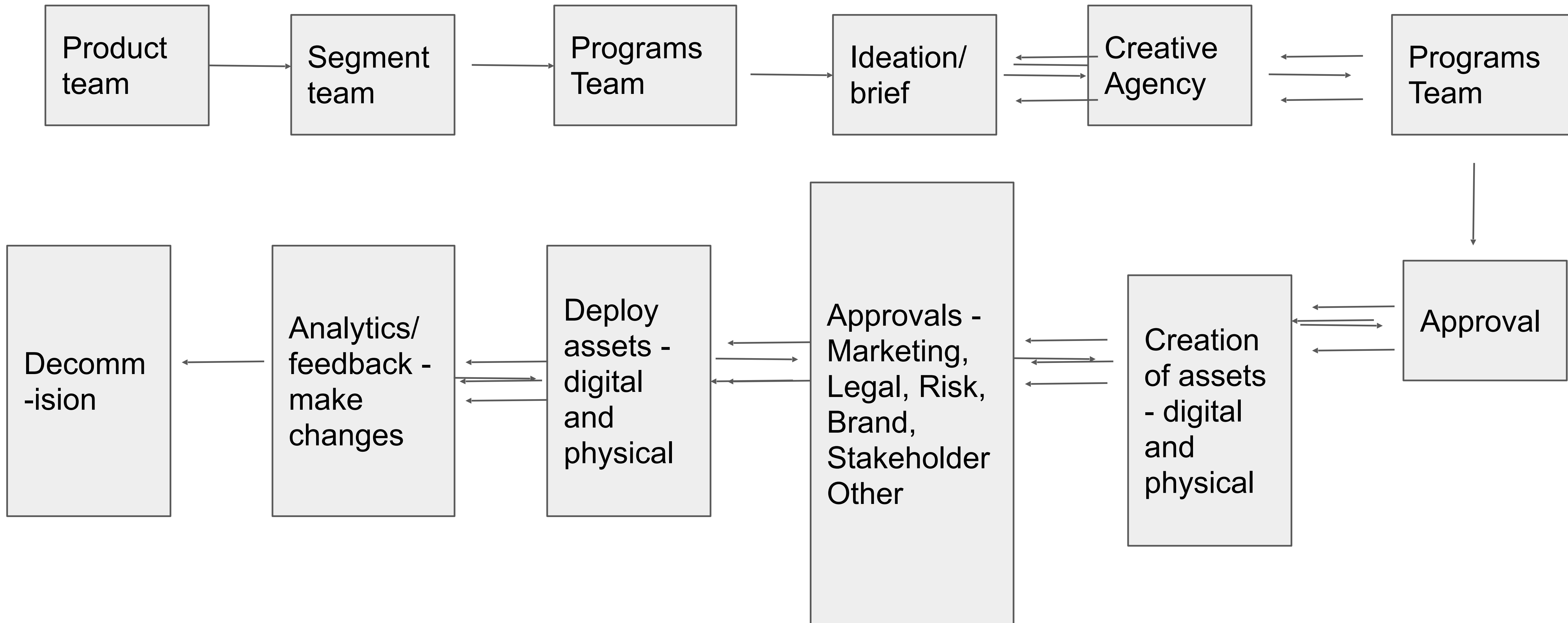
- Creative
- Innovative
- High technical risk
- Complex, new problems must be solved
- New processes
- Building a product
- One product/outcome at a time

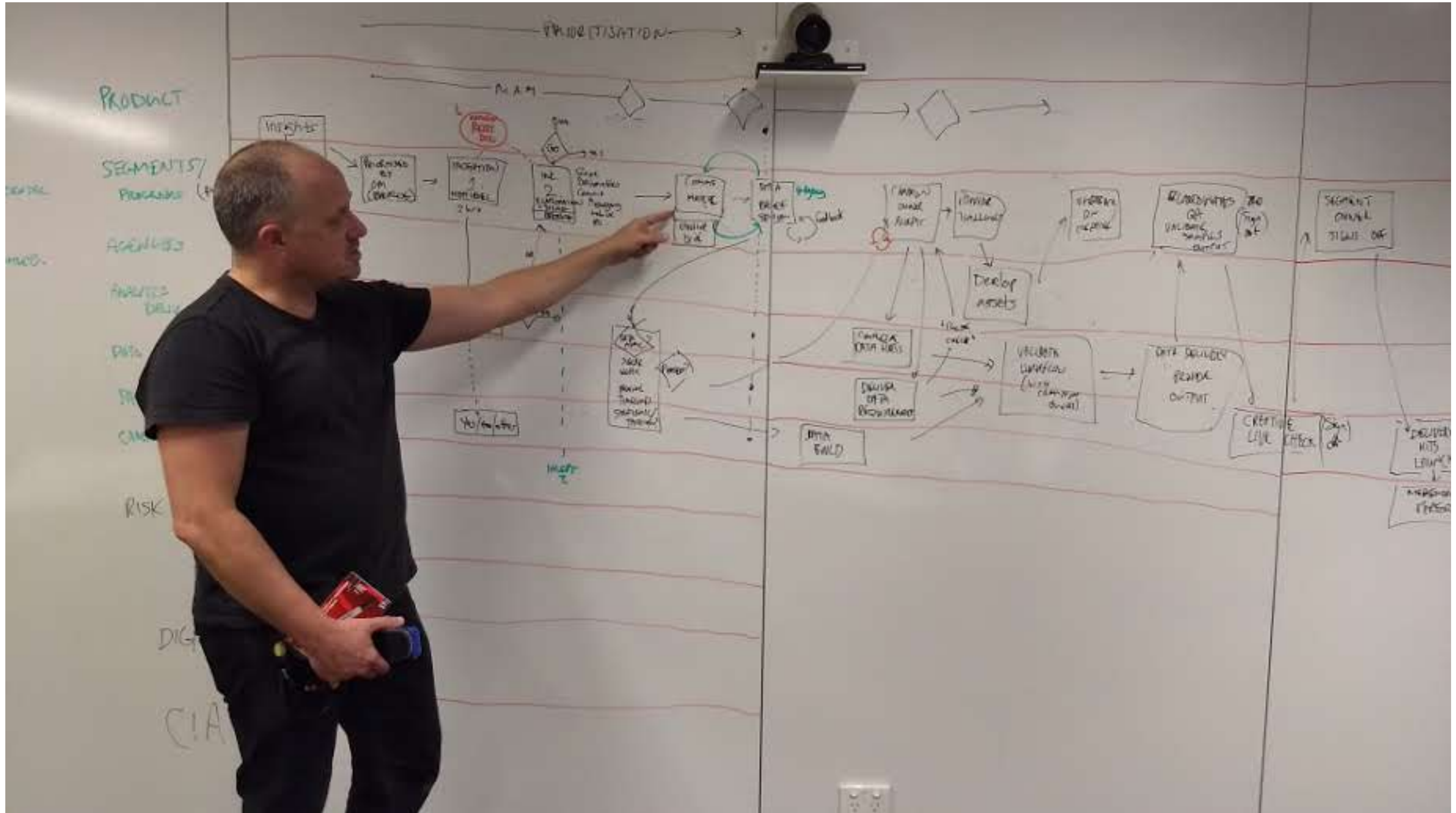
## Marketing

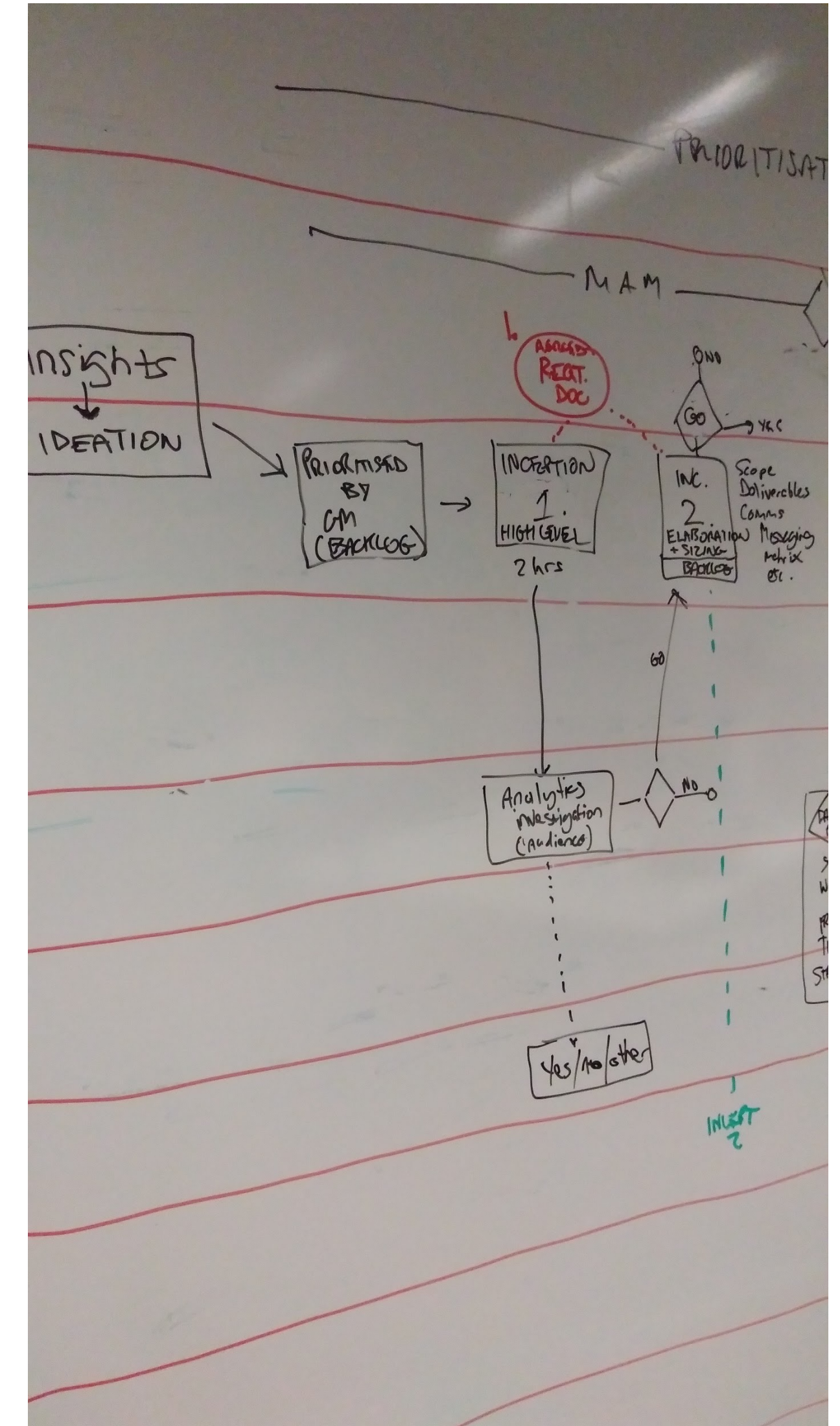
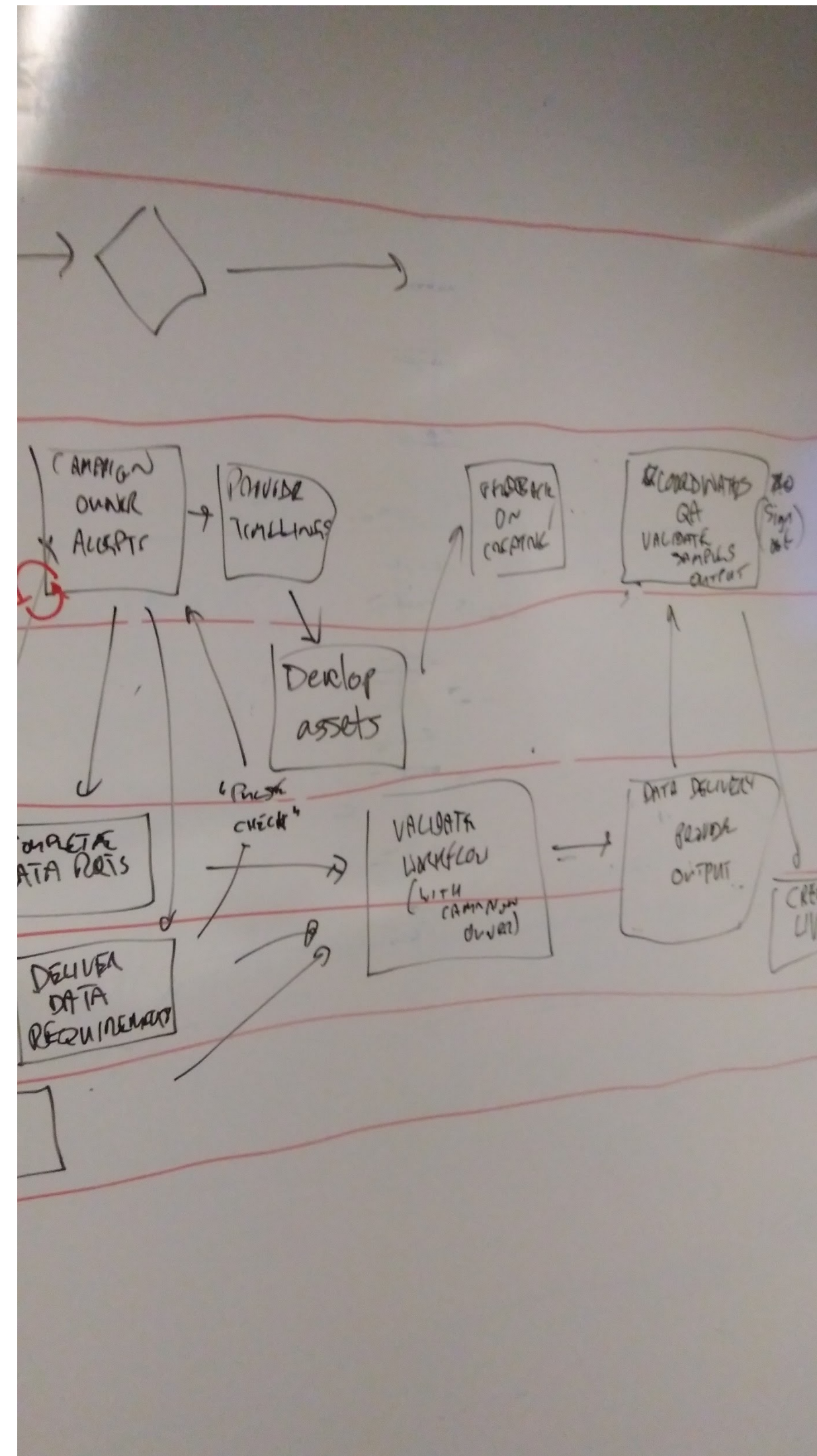
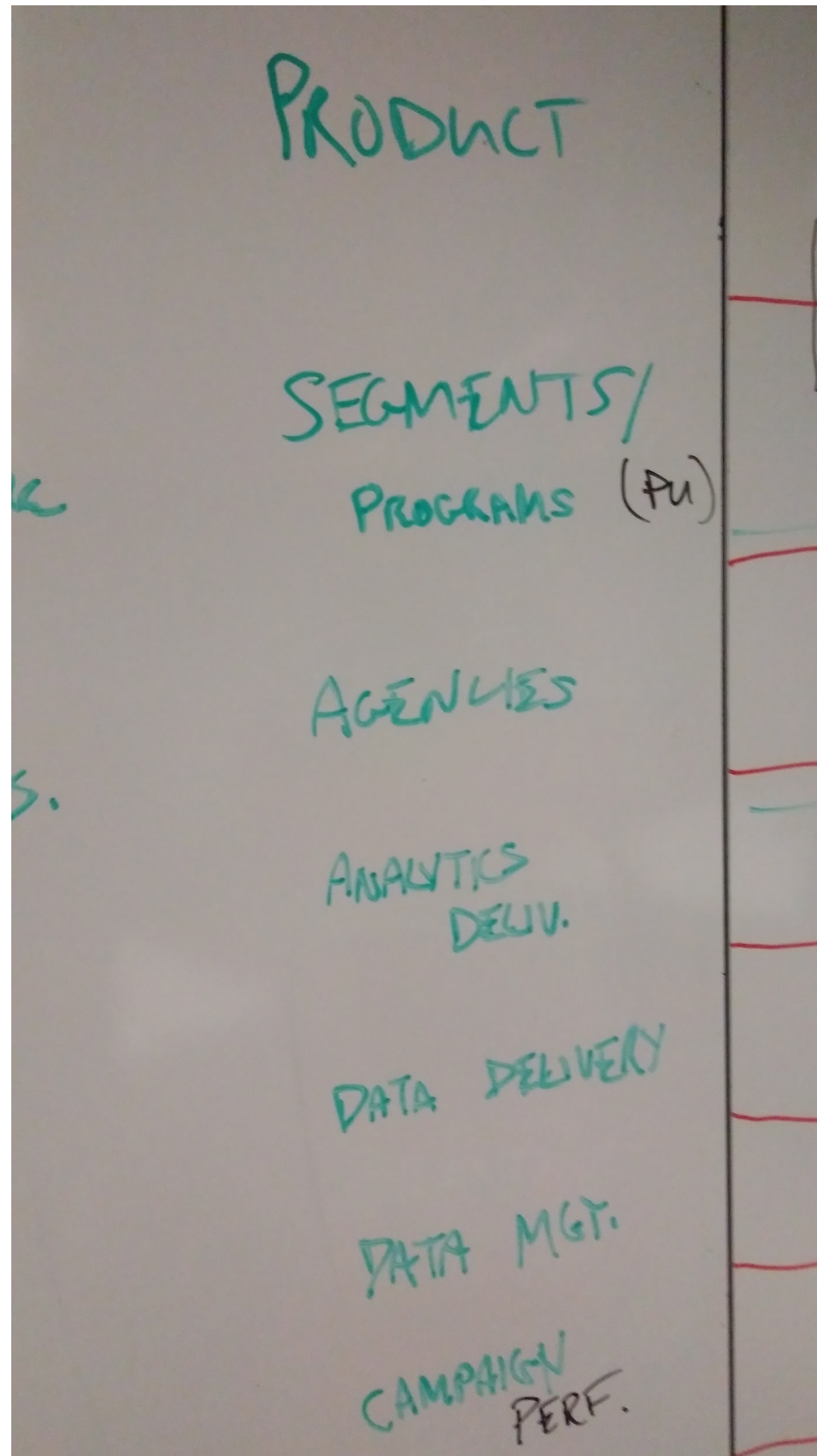
- Creative
- Innovative?
- Technology well understood
- Simple customer hypotheses tested
- Repeated processes
- Marketing products or services
- Many campaigns/ads/outcomes simultaneously

# Challenges

# Marketing campaign life-cycle







Handoffs, waste, waiting, rework

# Challenges

- Complex, non-linear value stream
- Teams highly specialised, not cross-functional
- Work is outsourced to creative agencies who work at a different cadence - so waste, waiting, re-work
- Teams then manage work through a complex approval process - waste, waiting, re-work
- Teams then pass on work to Analytics and Deployment teams - waste, waiting, rework
- Poor/no backlogs exacerbate these problems
- Weak/No Product Owners
- Product development Agile didn't work! How could we move to a more data/customer journey/moment focused way of work?

# What Agile methods would suit Marketing - let's try those!!!

- Break away from a Product Development Agile model
- Become more cross-functional
- Form, test and iterate on hypotheses quickly - MVP!!!!
- Experiment with team structures and processes
- Get value to market faster



# What we did

- Move away from product development Agile towards continuous flow Agile/Lean
- Kanban and scrumban boards to suit repetitive process work and identify bottlenecks
- Squads (not teams) to encourage cross-functionality
- 90 day plans to assist with product backlogs/sprint planning
- Portfolio views of work for planning and tracking work over the Quarter
- Attention paid to prioritising work - less is more!

# Way Forward - Overseas Travel Journey Moment



# How could we become data driven, digital marketers

- Become more cross-functional in teams
- Form, test and iterate on hypotheses quickly
- Experiment with team structures and processes
- Get value to market faster



*Travelling overseas*

## TELL US WHEN YOU'RE GOING OVERSEAS

Be sure to tell us about your trip, to keep your cards active and your money safe



***Problem - customers don't register for overseas travel***

Increased fraud, loss of cards, cards blocked, poor customer experience, increased cost to bank for call centres, replacement cards, emergency financial help



App already sent alerts if customer was at the airport

*Travelling overseas*

## HEADING OVERSEAS? TRAVEL SMART WITH THE NAB APP

Our app's travel tools can help you keep track of your holiday spending.

4 MIN READ



### *Goal - encourage registration of travel*

- Better customer service,
- reduced cost of call centres and helping customers overseas
- reduced credit card fraud
- Cross sell and promote other products (travel credit/debit, insurance, partner products)



***TXN airfares?? > get email > open email > click through to site > authenticated > register overseas trip***

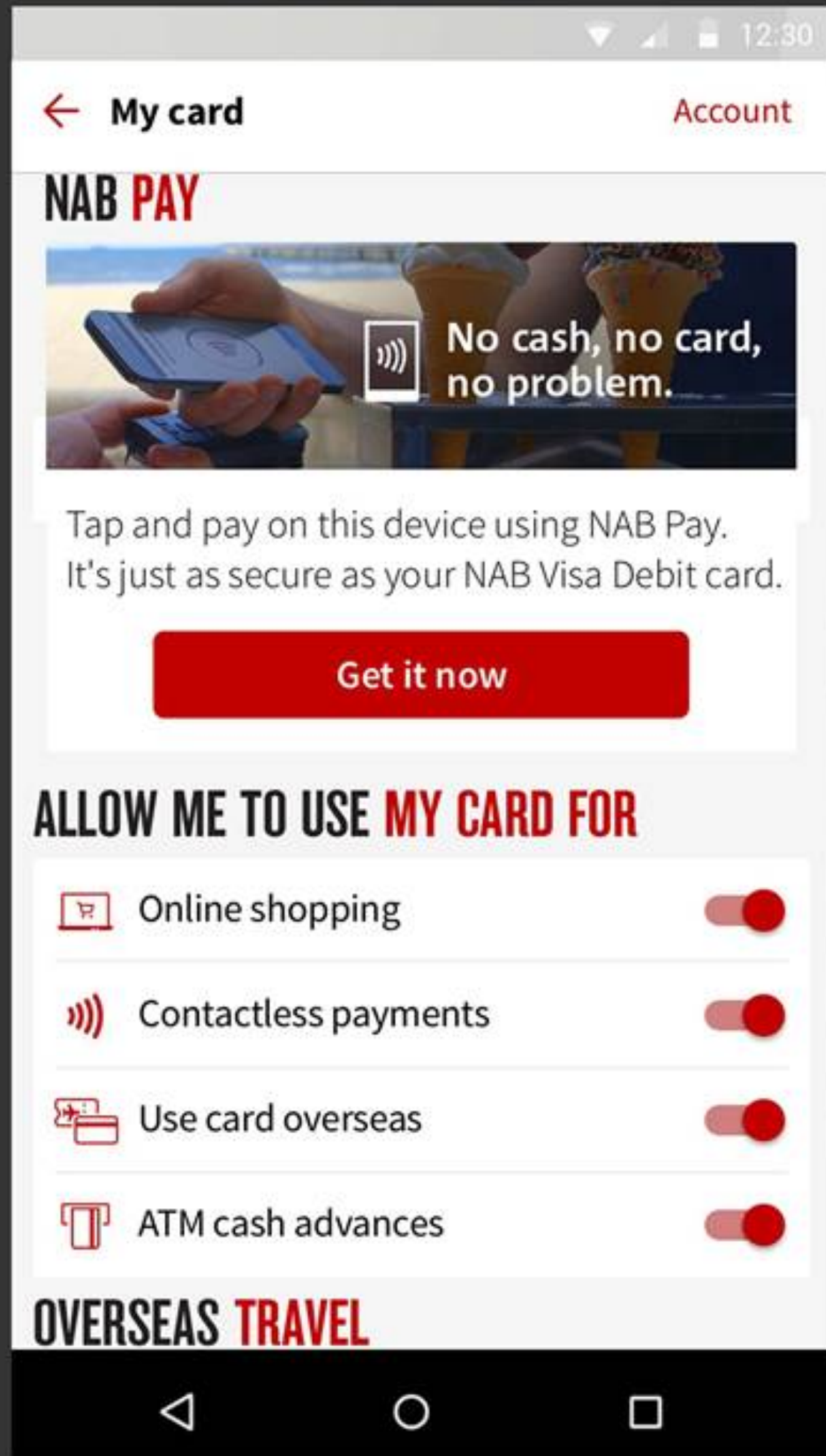
# Business hypothesis

We Believe That **identifying customers through transactions and emailing them**

Will Result In **some of these customers registering for overseas travel on the internet banking site**

We Will Know We Have Succeeded When **more than 10% of the customers who click through to the site from the email register for an overseas travel trip**

*\*\* secondary experiment ... could we set up a quick, agile, cross-functional team to run the experiment?*



- Formed a virtual team - with Data - Email template team - Creative - Digital production - Digital analytics
- Simple Kanban board
- Two month timeline End to End

# Result!



- Concept proven! - quick acting, virtual cross-functional team could get faster results than siloed teams
- Hypothesis validated - a significant % of customers registered for travel
- Team empowered - continue formulate hypotheses and test/learn/adapt

## *What's our next experiment?*

Can we cross-sell other products like travel insurance? Would a travel debit card help? What if we allowed customers to block/unblock their cards while travelling?

*Travelling overseas*

# DISCOVER COMPLIMENTARY OVERSEAS TRAVEL INSURANCE

Enjoy the benefit of complimentary overseas travel insurance with eligible NAB cards.<sup>1</sup>

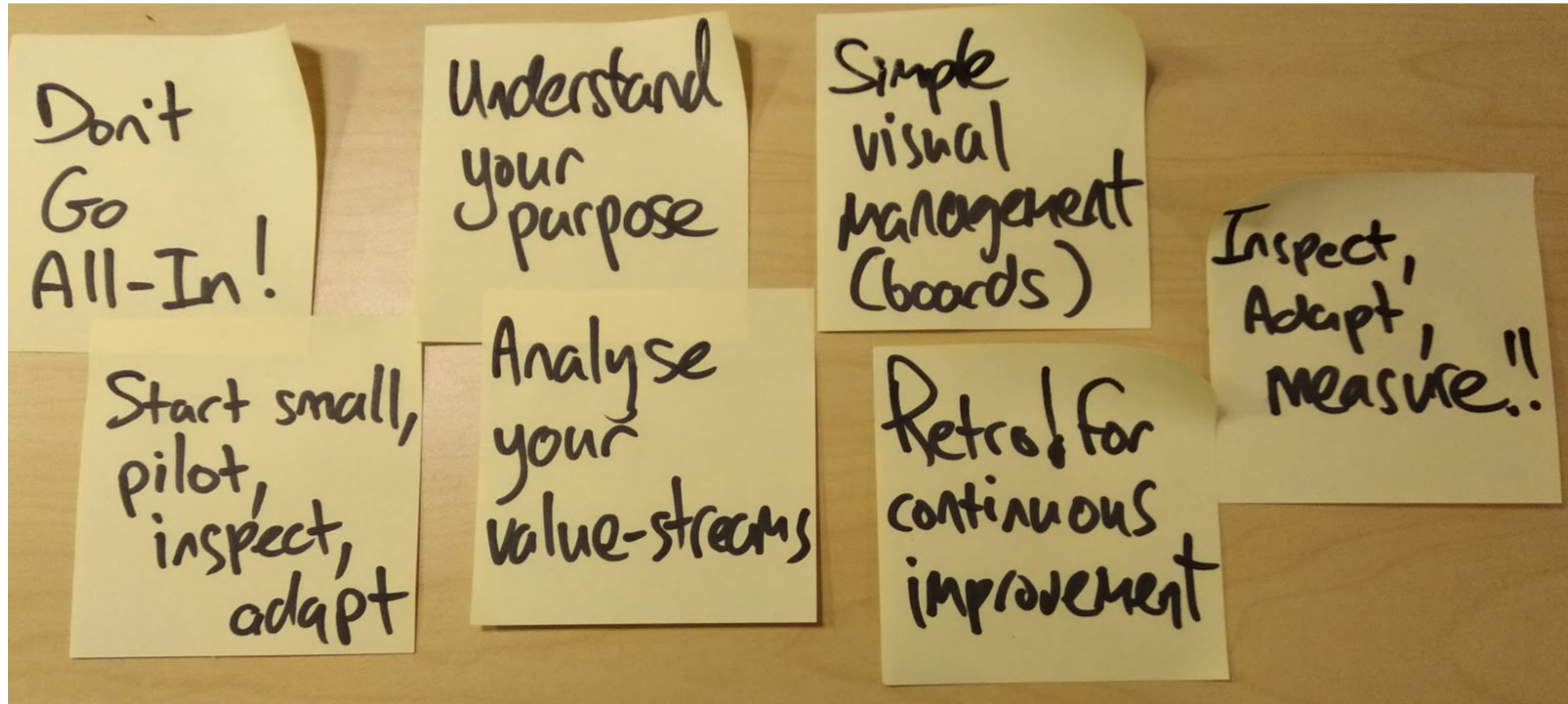


# Lessons for Agile Marketers



GO ON HOLIDAY SOONER  
WITH 75,000 BONUS  
QANTAS POINTS\*





@AgileAnt

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