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Agile marketing

The pill for productivity, adaptability and innovation



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Introduction

A recent survey by AgileSherpas revealed almost a third of marketers have adopted Agile marketing techniques to manage their work.



If you're among the two-thirds still managing projects in a traditional, waterfall-style, this guide is for you.

Adopting Agile has multiple benefits – faster speed to market, more responsive, improved results, better stakeholder relationships – though it won't be suitable for everyone.

This report explains the background of Agile marketing, considerations before adopting it, and the experience of leaders who've been on the journey and are now reaping the rewards.

Read on to find out:

- The defining principles of Agile
- A checklist helping you determine whether Agile is right for you
- How to know whether your team is ready for Agile
- A glossary that demystifies Agile's jargon
- Alison Orsi, CMO at IBM Europe explains how it's becoming 'Agile to the core'
- Advice from an Agile veteran, now CMO of BlackLine
- 5 lessons learned on Ricoh's Agile marketing journey.

Section 1

What is Agile marketing?

Back in 2001, 17 software developers met at the Snowbird ski resort in Utah. The result of that conclave was the Manifesto for Agile Software Development, a set of principles to underpin an alternative way of developing software to the traditional document-driven processes.

As the methodology became more popular, marketers working alongside these developers realized the benefits Agile could have, in particular collaboration and project management.

This led to the creation of the now famous Agile Marketing Manifesto, which adapted these principles to a marketing context.

The essence of Agile

The core of Agile is the ability to respond more quickly and effectively – change. Short bursts of focused work that are prioritized, reviewed and then changed.

Forget all the principles, frameworks and jargon – according to those who practice Agile marketing, the most important aspect is *mindset*. Agile requires a different way of thinking, being willing to assess effectiveness and change your strategy according to what you're seeing in the market – not three to six months later when the campaign is over. Given the speed of market and customer change, this is more relevant than ever before.

The principles of Agile software development

- Individuals and interactions over processes and tools
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan.

The principles of Agile marketing

- Validated learning over opinions and conventions
- Customer focused collaboration over silos and hierarchy
- Adaptive and iterative campaigns over Big-Bang campaigns
- The process of customer discovery over static prediction
- Flexible versus rigid planning
- Responding to change over following a plan
- Many small experiments over a few large bets.

Section 2

Key stats

32%

of marketers have adopted Agile marketing techniques to manage their work.

46%

have been practicing Agile for less than two years.

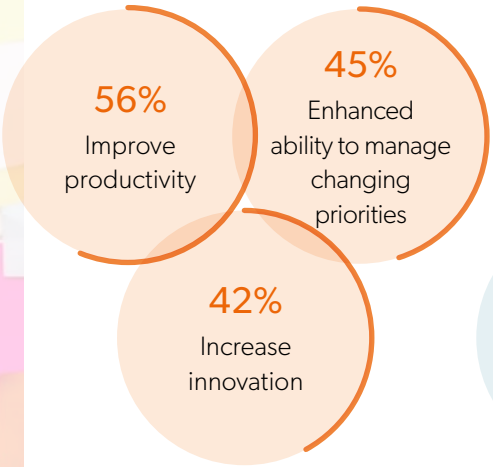
31%

are held back by a lack of training or knowledge around Agile approaches.

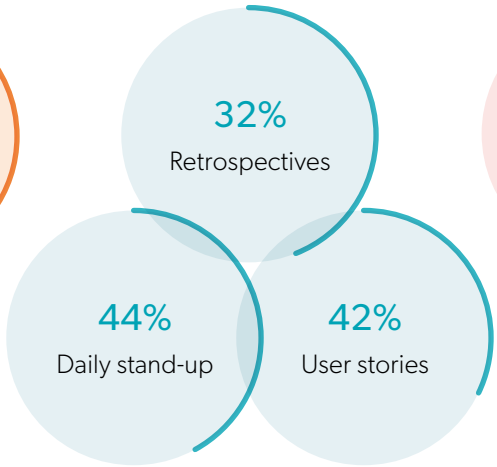
50%

of those using traditional 'waterfall' methodologies plan to introduce Agile within a year.

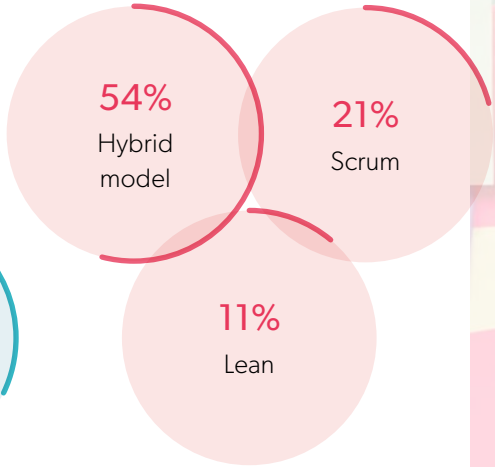
Top 3 reasons for marketers adopting Agile



3 most popular Agile techniques



Top 3 Agile approaches



Section 3

Why adopt Agile marketing?

Even though Agile can have a significant impact on your performance, it's not for everyone.

To follow is a checklist, helping you to determine whether it's right for you.

Agile marketing might be right for you if:

- Your team is beset by multiple requests from the organization and struggles to prioritize.
- It struggles to complete work to set deadlines and is running to stand still.
- It takes a long time to bring campaigns to market (by which time market conditions and customer preferences may have changed).
- You are chained to long-term marketing plans and budgets that leave you with little flexibility to react to marketplace changes.
- You work in an industry where there is constant product innovation and/or short sales cycles.
- The marketing team is disengaged or is siloed within the business.
- Your metrics have stagnated – or you need to deliver a step-change in growth – and traditional campaign tweaks such as A/B testing are not moving the needle sufficiently.

Should you wish to go ahead with Agile, these are the crucial considerations:

- Employees need to be willing to go beyond their job descriptions.
- A change in working practices, like any transformation, will result in major upheaval.
- Staff can't just learn Agile 'on the job', it requires training.
- Because of the high dependence on all team members, the methodology needs everyone to be bought into it
- 'Free spirits' can feel constrained by the daily routine (although it does provide plenty of opportunity to work under your own initiative).
- A lot of upfront work is necessary to learn the processes and methodologies, and this cannot be a half-hearted effort.

You don't necessarily need to be an Agile company to deploy Agile marketing – but whether Agile thrives will depend on certain corporate conditions. Can you say the following about your company culture?

- It's open to an experimental approach and is happy for marketing to try new ways of working in order to produce better results.
- It's open to trial and error.
- Successes are often (if not sometimes) scaled.

- It's open to change.
- It has open internal communications channels.

Can you say the following about your marketing approach?

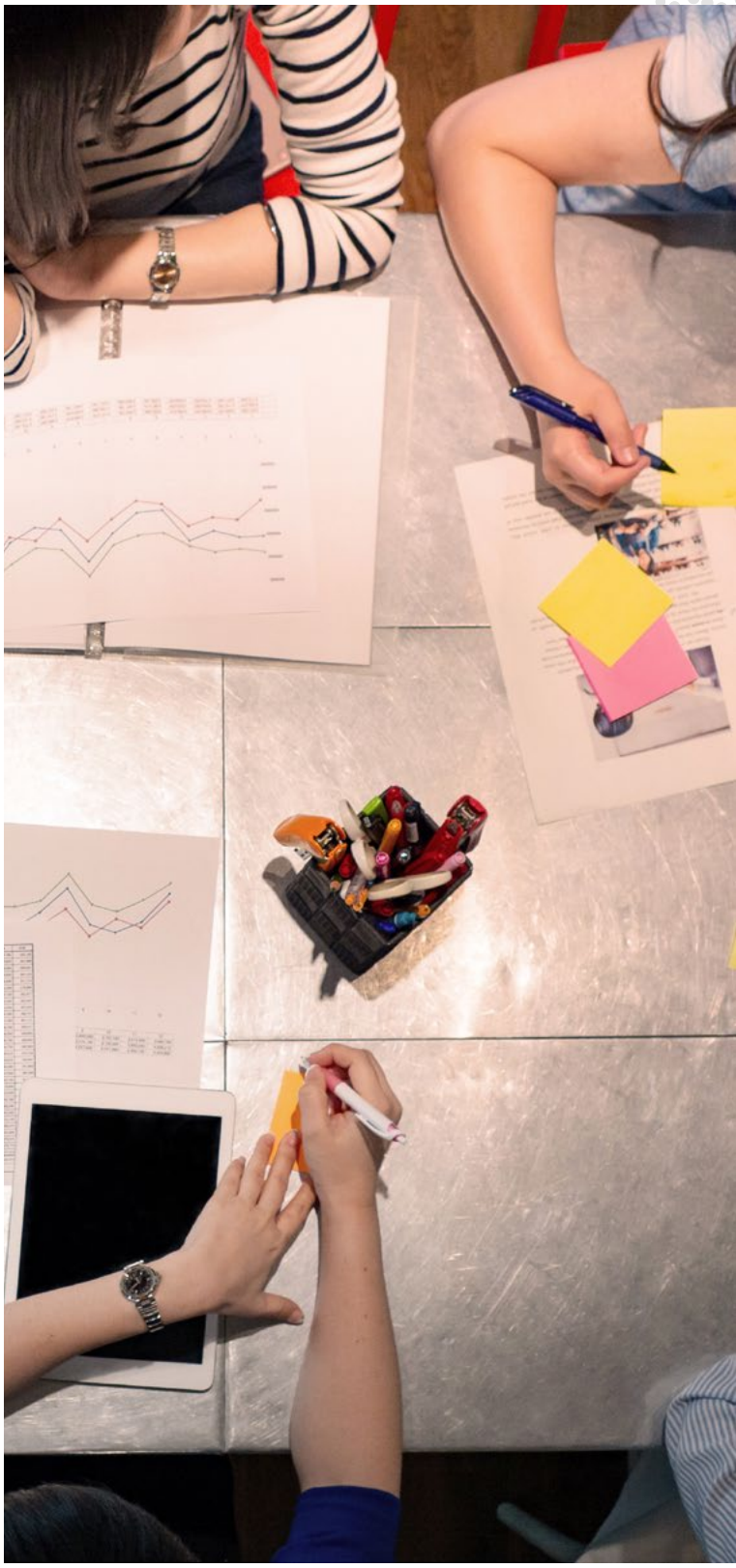
- A considerable proportion of marketing is focused on digital.
- It's customer centric, rather than product centric.

Can you say the following about your team, or a team within the marketing department? (If not, can you assemble a team that ticks these boxes?)

- The team contains a good mix of skills and backgrounds.
- Staff are open to trying new things and not afraid of failure.
- Employees are transparent about the work they're doing.
- People can make themselves available for daily team meetings (ideally in the same location, although this is not crucial).

If you can say 'yes' to all of these, you'll probably be in a good position to try Agile. If not, it's still possible to try elements of Agile, but you'll probably find it difficult to go all the way. The best advice is to start small and scale following success. This will be the most palatable option for a potentially resistant board. It'll mean that any failure is unlikely to have a huge impact on the organization.

> *"Agile is not a replacement for strategy. If you're going to drive off a cliff, Agile will just help you drive off faster"*
>
> **Mariette Ferreira, head of marketing, Equals**



Section 4

Is your team ready for Agile marketing?

According to Workfront's marketing director Joanna Betes, marketing teams must address three questions in order to best implement Agile.

1. Who is the target audience?

The Manifesto for Agile Software, the bible underpinning all Agile working states: "Our highest priority is to satisfy the customer through early and continuous delivery of valuable software."

The same is true for agile marketing. The highest priority is to satisfy the prospective customer through continually delivering marketing materials that lead prospects to a purchasing decision. This requires careful research, but it also requires you to constantly update your understanding of your prospects so you can effectively exceed their needs.

The Manifesto also says to "welcome changing requirements, even late in development," and an agile marketing team must be able to do the same. That is, the team must be flexible and nimble enough to adapt their materials to new information as well as ever-changing demands. The point of an agile methodology is to constantly update your understanding of prospects – both qualitatively via personal interviews and quantitatively via data and analytics.

2. What is the intention?

The Agile manifesto requires its adherents to "build projects around motivated individuals."

Motivated individuals are those who recognize that what they do matters to society. Their work gives them a sense of purpose. People with purpose are constantly refining their work processes to achieve real results. They work in an Agile way not because it's the latest fad, but because they know that if they're not constantly adapting to the needs of their prospective customers, their intention is flawed, and they aren't contributing to the well-being of others.

3. How have we changed?

One simple way to tell if your team is ready for Agile is to ask how much you've changed in the past year. "At regular intervals, the team reflects on how to become more effective," the manifesto reads. It adds that after the team reflects, it "adjusts its behavior accordingly".

In other words, if you aren't changing from quarter to quarter in light of evolving technologies, prospective customer demands, and new insights, chances are that you aren't very Agile. You aren't paying attention to how the market is evolving.

Of course, this doesn't mean that you should completely scrap your primary messaging documents every quarter. And it absolutely doesn't mean that you should change simply for the sake of change.

Instead, change in this instance means being willing to adopt enough flexibility that you're able to refine your approach in light of new information. You're not crippled by old ways of thinking. In a word, you're Agile.

Section 5

Agile marketing glossary

The world of Agile is chock-full of jargon and slang, which has the potential to confuse and frustrate those wanting to understand more about the subject.

The important thing to remember is these terms aren't essential in understanding the basics and principles of Agile. Many of these terms originate from the world of Agile software development and have been adapted for Agile marketing.

Backlog

This is essentially your to-do list. In a scrum, you'd usually have a Product Backlog and a Sprint Backlog – the former being your longer-term to-do list, the latter being the list of tasks you want to achieve in your next sprint. The purpose of sprint planning meetings is to prioritize and decide what moves from the Product Backlog to the Sprint Backlog.

Epic

This is a set of user stories over the course of a few weeks or months – in other words a campaign.

Kanban

Kanban is an Agile framework and alternative to scrum. The process supports continuous delivery without overburden by focusing on enhancing the workflow.

Kanban board

This is a visualization of a team's workflow, most often indicating work in the backlog, work in progress, what's awaiting approval and what's done.

Product owner

The nominated person within the organization who oversees an Agile team, but isn't necessarily involved in the team's day-to-day activities. This person has a more strategic role and often coordinates with senior management.

Retrospective

This is a meeting at the end of each sprint to discuss what went well, what could have been better, and things to remember for future sprints. This meeting is usually facilitated by the scrum master.

Scrum

Agile project management can be carried out in a number of different ways. The Scrum is the most common. The Scrum team includes a product owner, developer and scrum master. It's independent and cross-functional.

Scrumban

A blend of the scrum and Kanban frameworks.

Scrum master

The nominated person within an Agile team who leads sprint planning meetings, stand-up meetings and retrospectives. It's possible to become a certified scrum master (another way of learning the role).

Sprint

This method blocks work into weeks, usually between two to four weeks long. Each sprint starts with a sprint planning meeting, when the team decides the goals for the sprint ahead. It's bookended with a retrospective, when the team discusses what went well, what didn't, and learnings for future sprints.

Sprint demo

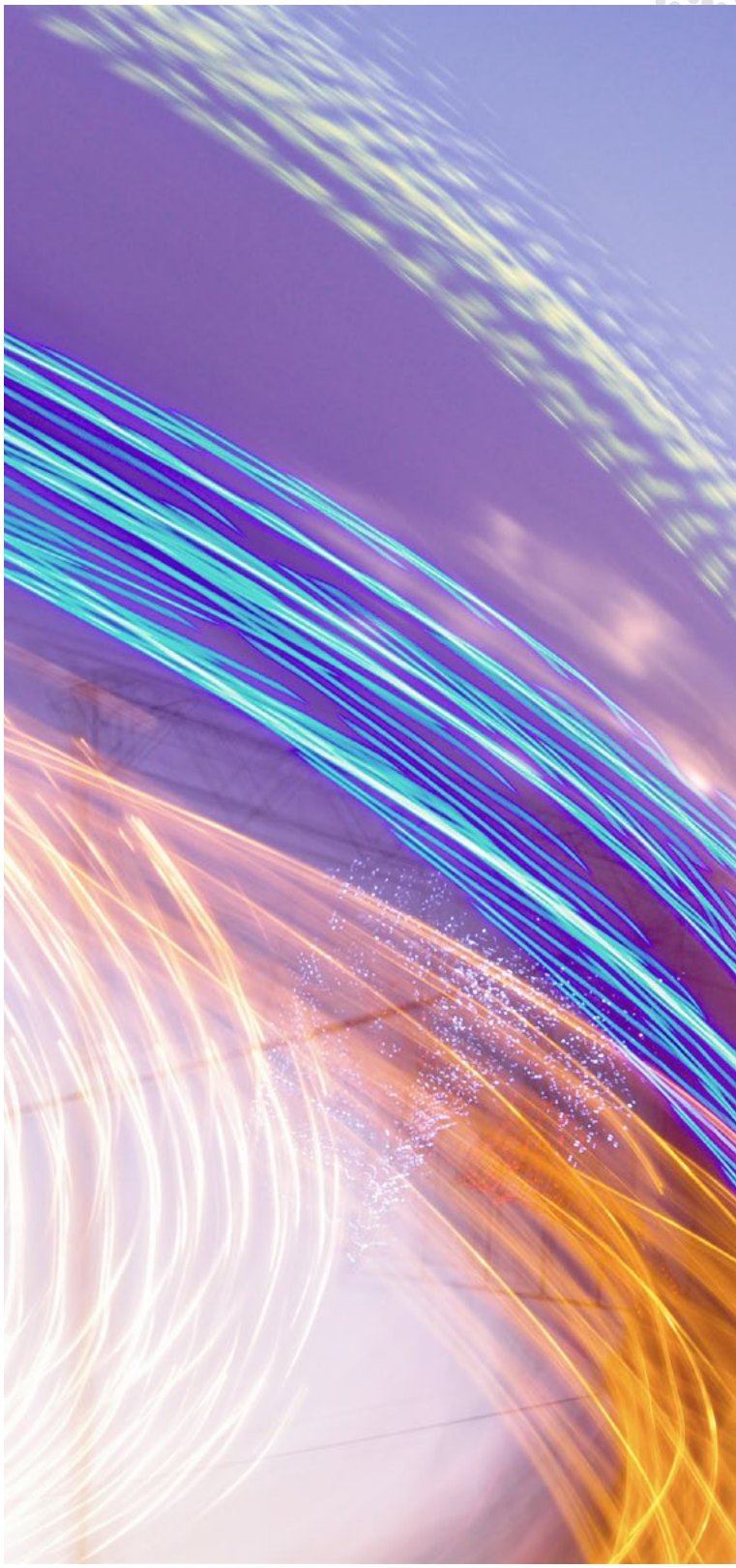
This is a time-boxed meeting (around one hour) during which the team plays back what it's achieved and demos any working functionality or prototype.

Stand-ups

These are daily meetings when the team discusses what each member achieved the day before, their tasks for the day ahead and any blockers. This is facilitated by the scrum master. People stand-up because the intention is to keep the meeting short.

User story

This is a tool that allows marketers to better understand their target audience (and personas) and their viewpoint. Often written on a large index card, they follow the format: "As a [role], I want to [task], so that I can [goal or benefit]."



Section 6

IBM: Becoming Agile to the core

IBM's marketing transformation plan has four pillars, one of which is to become 'Agile to the core'. Here Alison Orsi, CMO at IBM Europe explains how Agile marketing is a crucial part of "becoming the most outcome-orientated, customer-centric marketing team on the planet".

"The journey we're on is to become one of the most outcome-orientated, customer-centric, Agile-to-the-core marketing teams on the planet. It's not easy. You might think 'but you're IBM, you're a huge organization', but that also comes with its challenges.

One of the things I found most exciting was embracing Agile as a marketing function – and I mean Agile as a discipline, not agile as an adjective. We know there's a blueprint of how to deploy Agile in the context of software development and we're trying to work out how to deploy Agile in the context of marketing.

It's about how we develop the culture of Agile. It's not just down to the rituals of team sprints and daily stand-ups. In fact, if a team tells me it's doing Agile just because they've got a 15-minute interlock every day, I'm not impressed.

Perfect is the enemy of done

When we first started experimenting with Agile two or three years ago, the outcome of the first two-week sprint was to source data that would help them segment. But I wanted to know what they were actually going to deliver – what they were going to put into market in the coming weeks. It was a complete mindset shift for teams to start thinking that way; to start seeing their campaign as the outcome of their Agile project.

The best feedback you can get is putting something into market and knowing whether it worked or not. Part of Agile is embracing the mantra that 'perfect is the enemy of done', and knowing that you can release something and correct your course while it's live.

Suddenly we had specialists in the team rolling up their sleeves; I had comms specialists engaging on digital activity and product marketers acting as campaign managers – because that's what was needed in the two weeks before the next campaign milestone. I had one of my really junior



people excitedly run up to me telling me she got legal approval in three hours when it normally takes three weeks. That was her job in the team, and she was thrilled she'd figured out how to short-circuit the system.

Training the Agile champions

Most importantly, we want the teams to go on a learning journey and understand that they are assessing their own Agile health, asking how much they understand Agile and how it adds value to them.

We conducted two quarters of both virtual and face-to-face training in Agile. I really can't recommend it enough, the teams just have so much fun doing it this way and we have people falling over themselves to become Agile champions. We're providing support through Agile coaches, and we now have five coaches and 60 agile champions. That program is expanding globally.

Once a quarter we ask whether the team enjoys this way of working. The first six to eight weeks involves hard change, you have to work and collaborate in a different way. But once people have understood the power of creativity and speed, no one wants to go back.

It wasn't the easiest of journeys, particularly in a company like ours where we can't make changes overnight. The commitment we made to our teams was to make them the best marketers they could be and to give them the best skills for their careers.

We were asking people to come in to, and be in the office every day. That didn't match the way some people liked to work, so we lost some people through that. But I would say that most people who started to embrace Agile have come to love it and wouldn't go back. It's attracting a whole new set of marketers.

One of the big things I've learned arriving back from the US is that we in the UK and Europe like to moan a bit. My team will say 'we can't do that' and 'I need that' or 'this bit's missing'. I'll know our Agile transformation is complete when they start with 'this is what I want to get done' – because when we focus on the goal, not the limitations, we'll end up going further. That for me is what Agile will do.

The IBM Agile stairway

Values: Define and educate teams on core values of trust, respect, openness and courage.

Spaces: Create strategic and collaborative spaces that enable effective, cross-functional teaming

Training: More than 5000 marketers and 500 leaders globally have been trained in Agile principles.

Support: Add Agile coaches, an escalation group, a champions program and partner enablement.

Learning: Launch an Agile Health Radar to empower teams to identify and solve challenges

Section 7

Q&A: Advice from an Agile veteran



Andres Botero, CMO at cloud accounting software provider BlackLine, has implemented Agile marketing techniques in each senior marketing role he's been in. He reveals his experience of managing sprints and introducing Agile techniques to a team.

When did you gain your first experience with Agile marketing?

I had used it in the past at SAP (as global head of marketing for the firm's supply chain software). SAP has a very distributed team by necessity we had to keep in touch with on a weekly basis. I liked it a lot, so I brought it to Steelwedge in my first CMO role, and I've probably been using it for six years.

What are the benefits of employing an Agile marketing methodology?

It allows you to move very quickly. It is also very good if you have a geographical or time zone dispersed team, because it allows for very quick execution and alignment. It also improves collaboration. A lot of the time, people have really good ideas they're not able to share, so working in a group is better because you create a forum for that innovation to flourish.

How long does it take for a team to develop the Agile marketing mindset?

For the first two or three sessions, there was a little bit of push back but very quickly people come round and say it's really useful. At the beginning, you have people who will push back at you, but before long they see the relevance because a lot of conversations driving small requests happen at the meeting. Let's say the content people have a list of 20 things they are working on, the meeting allows them to prioritize their week. Not only do others understand the context of what the content team does and their workload, but also why it's important in the overall mission of marketing. That becomes very powerful very quickly.

Why do you think Agile is experiencing more popularity now?

Ten years ago, marketing departments were creating multi-year marketing campaigns. Markets these days move so much more quickly. In the time it's taken to create your campaign, it will start to become obsolete.

The Agile approach allows for rapid changes as you go. The idea is your campaign activities will be fresh when they launch because they've been continuously adjusted and improved as they're developed. The Big Bang approach is not only no longer relevant for software development, but also no longer relevant for marketing campaigns.

Do you have an example of how this has worked in practice at BlackLine?

Recently, someone suggested an industry we hadn't marketed to appropriately or targeted in the past. We've seen some deals happening, and we wanted a more deliberate approach to this industry. In a matter of few hours, we put together the assets we have for this industry and identified white space where we were missing assets. We identified business development representatives (BDRs) internally that would have an affinity for this industry. We quickly came up with who the campaign is trying to reach, who's going to identify them, and ensure we have enough contacts to reach them.

The digital team started an ABM campaign to reach them via our tech platform Terminus. Within a week-and-a-half, we had joined the accounts, the contacts, digital advertising and outreach allowing us to open those doors.

Agile has been very useful for ABM because the team is always thinking to execute quickly. You don't have months to think about it. You just have to break the problem into small steps or execute concurrently very quickly. This sense of urgency pushes people to move.

What's the biggest challenge when implementing Agile?

When you have a large team, the question is who should come to your Agile meetings? In the past, I've worked with marketing teams that are small enough – fewer than 30 people – so that everyone can be in the room. But if you have a larger team, they can't all be there. Agile leaders must represent their teams, so they need to be fully bought into the methodology and the philosophy of working in rapid weekly execution cycles.

If you have a geographically dispersed team, time zones are going to be tricky. You need to look at how many people you have in each of these geographies – how bad is it going to be for a team to have a call at midnight? In the places where you have fewer people, perhaps they can dial-in every two weeks, or record the meeting and have a separate call later.

What's your advice for marketing leaders seeking to implement Agile?

If you're a leader, probably the most important thing when you go through this methodology is keeping the long and mid-term objectives alive and making sure everyone's not wearing short-term glasses.

Your success depends on both the short-term execution and on the longer-term view. Within six months to a year, the team is going to be very into execution, things will go better, and people will trust each other. You need to have a space away to think about whether you are accomplishing everything you're supposed to. Are you going in the right direction? Are changes in the industry affecting you? Those questions are super important.

The other piece of advice relates to how a CMO and team know they're doing a good job. It's about establishing metrics and sharing them with everybody. In this rapid execution, people need to understand what they're trying to achieve. My key metric is pipeline generated over dollars of spend. Sharing that with the team is really good because they understand what you're trying to do. Week-over-week, they either see the need to be a bit more frugal, or focus on yield or programs. Over time, they start doing it themselves.

Andres Botero: CV

2018-present
CMO, BlackLine

2017-2018
CMO – alliances, channels, marketing, CallidusCloud/SAP

2015-2017
CMO, Aria Systems

2013-2015
CMO, Steelwedge

Section 8

Who's in an Agile team?

The optimum size of an Agile team is between six to 10 people and has three elements, the product owner, the scrum master and the team itself.

The scrum master is responsible for leading the day-to-day running of the team. They need good communication and negotiation skills, excellent organization and effective leadership.

- Track and remove obstacles the team are coming up against – this can mean negotiating with senior management and other departments.
- Ensure the 'rituals' of Agile are adhered to.
- Organize and run sprint planning sessions, reviews and retrospectives.
- Track the overall progress of the team throughout sprints.
- Make sure the team has everything it needs to get the job done.
- Keep an eye on the velocity of work carried out by the team so that the right amount of work is planned into each sprint (this is worked out over time and should become more accurate as time goes on).

The product owner has overall oversight of the team and projects it's working on and is often in a senior position in the organization. They must have an in-depth understanding of customers, the marketplace, competition and future trends. They must also have the power to take decisions, and balance short-term delivery with long-term vision.

- Set the agenda for the team by maintaining the product backlog and ensure everything is prioritized correctly.
- Represent the business and ensure the customer (or user) is at the center of everything the team does.
- Set objectives and KPIs and report back to the board.

The most successful Agile teams contain members with a range of different backgrounds and skillsets. A key part of being a member is volunteering to take on tasks that might not sit within your usual remit – which is also one of the benefits as it allows members of the team to develop new skills.

- Be proactive.
- Be prepared to be open and transparent about work.
- Be ready to take on tasks that wouldn't be in their usual remit.
- Understand that their job title is unlikely to be relevant.
- Be committed to the success of the team and its output.

Section 9

5 lessons learned on Ricoh's Agile marketing journey



At B2B Marketing's 2017 Ignite conference, Ricoh UK's marketing director Chas Moloney was so inspired by a case study on Agile that he decided to implement it in his own business. A year later he was invited back to B2B Marketing's 2019 Ignite conference to tell the tale of how he got on. Here he shares the five main lessons he and his team learned.

1. Better stakeholder management was an unexpected benefit

The benefits of implementing Agile marketing at Ricoh have been numerous, says Moloney – and one of the biggest is the way it's improved stakeholder relationships.

"It has increased stakeholder awareness. That was a big win, the ability to interact with our sales leaders in a much more dynamic and progressive way," he says. "What goes hand-in-hand with stakeholder management is the [improved] internal perception of marketing now – even within finance. Because of the business' visibility in terms of driving sales and the performance of Agile teams, it's very clear what we do every day.

The goals around Agile are to improve the speed, predictability, transparency, and adaptability of the marketing function, and these were all challenges the team at Ricoh faced. The promise of Agile suggested improving speed to market by 27% and an uplift in metrics of 23%, plus better employee engagement.

2. Agile is not just one thing, and there's no one-size-fits-all

The jargon and complexity associated with Agile can be off-putting, as Chas felt even having carried out research on the subject. What changed his mind was attending a presentation at Ignite 2017 by Andrea Fryrear.

"I still didn't get what Agile was – and that's because Agile isn't one thing. Agile is lots of things but there are various flavors – Kanban, Scrumban, Kanbanese Scrumbanese… these titles really confuse people.

"Andrea said this was all crap, that you need to build and Agile approach that works for your organization. There's no one-size-fits-all."

3. Agile is not a panacea for all woes

Speed is crucial at Ricoh and a key mantra of its CEO. The mindset behind Agile –being responsive

to change, adopting rapid iteration and numerous small tests –excited Chas.

"The challenge is you need to get from home to work. If we're going to build a car, it'll be ready to take you to work in 12 month's time. But what if we started to look at a different way of doing it? You can get to work on a scooter, but it'll take you and hour-and-a-half. In three month's time, I'll give you a bike and you can half that, and in another three months, it'll be a motorbike, and in three month's time, you can have your car.

"What you've been doing is adding minimum viable product during that time, and this is one of the essences with Agile. I was at a customer advisory board meeting and one of our customers started talking to me about minimum valuable products, as long as it starts to add value to our clients let's get it out there, start testing it, start driving it."

But could this be applied at Ricoh? Chas organized a one-day workshop with B2B Marketing's trainer and consultant Shane Redding to find out. One of the crucial learnings was in the projects Agile does and doesn't work for. Even today, with a fully Agile team, there are still projects – mainly those with a defined date such as a trade show or product launch – that are managed in a waterfall technique.

The workshop revealed the team was agile, but not Agile – the systems and processes did allow them to change, but they hadn't adopted Agile techniques and processes to get to market faster.

4. Agile is a mindset

Agile's not a methodology – it's a mindset. This was the big lesson Ricoh's marketing team learned from two training sessions held at the start of the year. They discussed the various Agile approaches, methodologies and principles, including which resonated most. At the end of the day the team voted on which on they thought was best.

The second day was spent exploring and developing different Agile techniques, selecting and rejecting those that were liked or not. The result at the end of the two days was Ricoh's blueprint of Agile marketing.

5. When it comes to Agile, do what's right for you

Agile needs to suit your own corporate culture. "Don't be prescriptive to the methodologies, do what's right for you," says Chas.

With their own blueprint in place, the team dived straight into launching some pilot projects. Of the three that were launched, one led to something that was taken to market, while the other two fell by the wayside as the team became too busy.

As a result, it was clear the team needed a seismic change. Ricoh achieved this by aligning the responsibility for Agile to one of the leadership team. This gave it both the impetus and gravitas needed to embed it internally. "Don't just look to your digital natives or millennials to be your Agile champions – it can be anybody," he adds.

The first completed Agile project was a revamp of the business' customer experience center. This required £60,000 of non-marketing budgeted expense, which was signed off by the CEO. And in the tradition of Agile, the center continues to change and evolve.

Now, all the team's marketing plans are live on a Kanban board (they use the free software Trello), and visible across the marketing teams and sales leadership.

By adopting Agile marketing, Ricoh has improved its metrics by 12%, introduced better working processes, stakeholder buy-in is significantly up, employee engagement within the marketing team has risen, and the perception of marketing's activities and plans have also been boosted.

About

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- Find real-world inspiration for rolling out some outstanding marketing initiatives.
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