



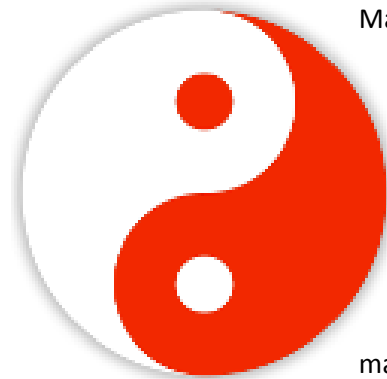
# The Art of Agile Marketing

**Reimagining Marketing Work through Agile Principles**

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## Reimagining Marketing Work through Agile Principles

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Marketing has always paid more attention to madness than to method. Cool brands, viral campaigns, and hot leads: these are the things we want from marketing. Contrary to conventional wisdom, cool brands, viral campaigns and hot leads are not the result of big ad budgets and the latest Internet technologies. They result from the hard work of smart, creative marketing teams.

If you examine the budget of any marketing department, you will discover a surprising and universal fact: most of the money spent on marketing is spent on people. Not ads. Not technology. While the majority of marketing spend is invested in people, very little attention is given to managing that investment. Dissertations have been written on how to get the most out of people in sales, engineering, and manufacturing, but marketing has refused to be pinned down by any standard process—until now.

As if by fate, marketers everywhere are discovering the power of agile marketing. Over the last three decades, agile management principles have transformed thousands of [engineering](#) and [manufacturing](#) organizations into efficient, flexible, high performance teams. It is somewhat surprising that it has taken this long for marketers to get on the agile bandwagon, because agile and marketing go together like chocolate and peanut butter.

Marketing is as much an art as a science. What matters more: a market survey percentage point or the unique insight of a single customer? Click-throughs or brand engagement? For any given customer on any given day, either opposite might be the right answer. Moreover, marketing projects come in a bewildering variety: creating a website, putting on a conference, pitching a story, designing a product, etc. Each marketing function from product management to public relations appears to follow its own unique process. Despite the wide variety of marketing projects, however, there is a core commonality to all marketing work. Like engineering, marketing is a creative process performed by cross-functional teams acting toward a common goal. Like sales, marketing work is subject to a great deal of uncertainty. Success or failure can hinge on the strength of a personal relationship, for example getting a reporter to cover a story.

**“ Most money spent on marketing  
is spent on people.  
Not ads. Not technology. ”**

Finding balance amongst complexity and contradictory forces is agile marketing's strength. From the agile marketing point of view, the long term is just the sum of the short. Uncertainty is fact yet to be revealed. Quantity is quality taken one at a time. And, yesterday's expectations are today's results. *Agile methods simplify complex, cross-functional business processes in the face of uncertainty to [maximize throughput](#), increase flexibility and enable [continuous improvement](#).* Don't let the hype fool you. Agile is not religion, fad or fluff. Agile is a field-tested, proven business management approach based on solid operational principles. Agile marketing is exactly what marketing managers need to tackle the difficult organizational challenges of modern marketing management.

## Organizational Challenges of Modern Marketing

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The collective inattention to marketing work processes has led to a familiar set of organizational ills that inflict almost every marketing department. They are a source of constant CMO frustration and a drain on precious marketing team resources, siphoning away their energy into politics, rework and waste.

### Marketing Is Messy

Marketing work processes are deceptively complex. Think of the number of people that might touch a simple email before it ends up in the hands of a customer: a product marketing manager, a copywriter, a designer, a web developer and an online marketing manager would not be unusual. Likewise, marketing teams come in a wide variety and can be very dynamic, popping up to handle a product launch or trade show and then disbanding. However, marketing work is not inherently messy; we marketers make it messy by glossing over the complexity and reducing marketing management to the lowest common denominator: making a list.

“ Marketing is not inherently messy; we marketers make it messy. ”

While awash in all the latest demand generation technologies, most modern marketing departments are still managed by spreadsheets. Unfortunately, [spreadsheets were designed to do financial calculations](#), not marketing management. Useful though it may be, a simple spreadsheet list has many shortcomings. It is not aligned with strategy. It is not linked to results. It does not facilitate collaboration. It is easily lost. And, it is often ignored. The result is confusion, bottlenecks, delays, misaligned expectations and missed goals. But, that's OK. We're creative right?

### Marketing Is Misunderstood

Non-marketers often have the hardest time understanding marketing value, let alone the work required to deliver that value. At the same time, the conventional wisdom is that anyone with good communication skills and a little common sense can do marketing. There is some truth to this, in as much as anyone with good relationship skills can do sales or anyone with good math skills can do accounting. But it is much easier to identify bad sales and bad accounting than bad marketing.

When people have a poor understanding of your value and the work required to create that value, they tend to negotiate rather than collaborate. Imagine the VP of Sales who wants to see an upgrade to the company website, because he believes it is causing his reps to lose deals. Never happens right?

As the marketer in charge of the website, do you...

- a) Negotiate with sales and settle on a two month upgrade that you know will take three months
- b) Collaborate with sales and start making small improvements immediately

The answer will depend very much on the understanding each has of the other's value and work. Do you feel sales' pain from the current website? Do you know the problems it causes and the wasteful work required by sales to circumvent them? Does the Sales VP know and care about the challenges and work process involved in creating a website? As long as marketing remains a mystery to the rest of the

organization, there will be limited collaboration, misaligned expectations, unhealthy risk avoidance and [short CMO lifespans](#).

## Marketing Is Out of Touch

Business schools teach that marketing provides strategic leadership and effective communication grounded in a deep understanding of customers, competitors and the industry. In the real world, marketing is an isolated corporate function that often focuses more on internal politics and plans, than on industry knowledge and relationships. When was the last time you spoke to a customer? What about the rest of the marketing team? Is customer feedback the life blood of your marketing organization? Or, is a quick email survey something you do when you have some extra time?

Marketing priorities are a constant battle between short term action and long term understanding. Nine times out of ten, the short term wins. When marketing consistently favors activity over acuity, the result is mediocrity. Moreover, customer knowledge is the foundation of marketing value and influence within the firm. Out of touch marketing departments lose their relevance and are reduced to producing poorly qualified leads and pretty pictures.

## Marketing Is Always Reinventing the Wheel

With management by spreadsheet, marketing maintains no organizational memory. Knowledge evaporates on flash drives and relationships lie hidden away in email boxes. Without history, it is impossible to establish benchmarks. Without benchmarks, it is impossible to improve. Unless you are continually experimenting with something new, even the strongest performing marketing team will eventually stagnate. Absent the CMO habit of trying something new, CEO's fall into the habit of trying someone new.

The lack of marketing memory is compounded by staff turnover. Rework becomes the rule. Mistakes are repeated. And, critical marketing relationships with customers, vendors, and industry influencers erode. Who spoke to that journalist last? Who knows the customer in that case study? Did we get approval? And, so on. Before sales force automation systems, when a sales rep walked, he walked with his rolodex. This is still true in marketing.

## The Five Principles of Agile Marketing

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Agile marketing is not a recipe. If your exposure to agile marketing to date has been through a specific methodology, such as [SCRUM](#), then you should quickly disabuse yourself of the idea that agile marketing is defined by any one methodology. Agile and marketing are a recent marriage. We should expect a lot of exploration and a fair amount of discord as they get to know each other. For all its positive aspects, [SCRUM was designed for software development](#), not marketing.

“ Agile marketing  
is first and foremost  
a culture. ”

Today, there is no well-defined methodology for agile marketing. Agile marketing is not agile engineering or agile manufacturing. As it evolves, agile marketing will discover its own variation of agile that snugly fits the unique qualities of marketing.

Agile marketing is first and foremost a culture: a belief system founded on a set of management principles that deliver dramatic improvements in performance. How these ideas are applied in practice

may vary greatly. What matters more than any agile marketing methodology is a fundamental understanding of core agile marketing concepts—that and a little creativity as to how they can be operationalized. It is most certainly the case that the best agile marketing methodologies are yet to be invented. Be creative and you might just invent one!

The sections that follow present the five core principles of agile marketing with the goal of understanding the impact of each principle on marketing team performance. We also explore some of the unique operational challenges of marketing that distinguish it from engineering and manufacturing when reducing agile marketing principles to practice.

## Agile Marketing Principle #1

### Maximize Throughput by Working Incrementally

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Imagine for a minute that you're an auto mechanic and you need to rebuild the engine of your old car before it fails. There is just one hitch. Your car is the primary source of transportation for your neighborhood, so you must always keep it in working order in case of an emergency. How will you do it? If you didn't have to keep the car in working order, you could just disassemble it, lay all the parts out on the lawn and put it back together one piece at a time over the course of several months. This appears to be a very efficient approach, until the neighbor's kid falls out of a tree and breaks his arm, and you need the car to rush him to the hospital. Now imagine

that the car is your tired old website and your neighbor's kid is your CEO. The emergency is your CEO's decision to move a major product launch up by two months to shore up next quarter's revenue. The moral to this little car story is this: stuff happens. A high performing agile marketing team must rapidly adapt to change without sacrificing productivity.

The agile marketing principle of incremental work is based on the recognition that productivity and flexibility are not true enemies. The conflict arises when you focus too much on the efficiency of your work and not enough on the value your work creates. When stuff happens, small projects can be quickly finished to deliver immediate incremental value. Big projects deliver no value when they are constantly interrupted and create waste when you leave all those car parts out on the lawn to rust. Your flexibility depends on shrinking the amount of time it takes to get things done. Your productivity depends on getting things done fast. Smaller, incremental projects maximize both simultaneously.

**“ Work that has no value to the customer is waste. ”**

We all have some natural experience with working incrementally. We've all made a list. But there is a lot more to the agile marketing principle of incremental work than just making a list. You must make the list with the goal of getting the most done *under the assumption that you will be interrupted again and again*. Getting back to our car, we can see that simply making a list isn't going to get us very far. What do you do first? What tasks can be done quickly and independently? How do you restore the entire engine over time, while always keeping the car close enough to working order that you can rush your

neighbor's kid to the hospital on a moment's notice? The agile marketing principle of incremental work doesn't require you to know all the answers. Sometimes there are no answers. It does require you to ask the questions persistently. Can I break this large project up into smaller projects where each smaller project delivers incremental value? Can I do it again, and again?

The agile marketing principle of incremental work is easy to apply to some marketing projects: a weekly blog post, a landing page, and a press release all represent nice little nuggets of marketing value. Other projects, such as product launches, trade shows and ad campaigns feel a little more like trying to rebuild a car engine. However, it is when we apply the agile marketing principle of incremental work to these seemingly monolithic projects that you reap the real benefits of agile marketing. Anyone can finish a blog post, but can you quickly and efficiently revamp your entire event calendar when you are asked to reduce your marketing budget by 20%?

## **Agile Marketing Principle #2**

### **Minimize Waste by Managing Uncertainty**

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Marketing is rife with uncertainty. Will this website upgrade increase conversions? Will the press run my story? Can we get this brochure done in time for the launch? Surprisingly though, we do very little to manage it.

Take this test. Pull out your marketing plan, i.e., your list. Which items on the list will absolutely happen when, where and how you plan for them to happen? Which items might or might not happen? Which items are unlikely to happen at all, unless you get lucky? If you are like most marketing managers, your list will have a mix of all three. Why are they all on the same list?

Suppose you plan to write three customer case studies this quarter. What does your plan look like? Until you have three customers that have agreed to work with you, you don't actually have a plan to write three cases studies. You have an idea or a goal of writing three case studies. The plan probably starts with speaking to ten customers to get the three you need to agree to the case studies. Then you have to write the case studies. The first half of the plan where you are securing the approval of three customers is much less certain than the second half of writing the case studies. If you randomly mix the uncertain work with the certain work, you will never know where you really stand with respect to getting things done. And remember, getting things done is what counts.

The simple solution to this problem is to separate what you know will get done from what you don't know will get done. This buffer between the work that you can do today and the backlog of work that you can't allows your marketing team to focus on finishing the things that they can get done, instead of spinning their wheels on the things that they can't. By focusing on the smallest possible increments of value that can actually get done, you maximize agility (hence the name). Agile methodologies like SCRUM define formal processes to transform the agile marketing principles of incremental work and managing uncertainty into organizational habit.



## Agile Marketing Principle #3

### Measure Value through the Eyes of the Customer

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This agile marketing principle may appear unnecessary, because marketing by definition is supposed to be customer focused. Marketing departments, particularly those separated from customers by a sales team, can easily become estranged from the customers they serve. The first two agile marketing principles focus on getting more things done faster. This third agile marketing principle ensures those things have value by making the customer the ultimate judge. Work that has no value to the customer is waste.

The problem lies in the fact that it is easy to measure marketing quantity, but it is very difficult to measure marketing quality. For example, it is simple math to predict that twice as many emails should result in twice as many leads. You don't need to know anything about the customer. Doubling the impact of the email message or the quality of the leads produced is harder to model and harder to do. In the end, only the customer can judge. The customer is the one who responds to the message and the customer is the one who decides to buy.

Most marketers spend ninety five percent of their time talking to customers rather than listening. Great agile marketing requires a systematic and pervasive sympathy to customer needs that scales with the business. While a good idea, it is not sufficient to hire a few former customers as product managers with the hope that they will imbue rest of the marketing organization with their wisdom. Nor is it sufficient to conduct the occasional satisfaction survey, email it around the marketing department and then forget it. Agile marketing teams should strive to let the customer be the judge of everything they do. They must establish accessible, frequent, low maintenance customer feedback mechanisms that enable everyone in marketing to see the world through the customer's eyes.

**“ Most marketers spend ninety five percent of their time talking to customers rather than listening. ”**

## Agile Marketing Principle #4

### Foster Collaboration with Total Transparency

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When your colleagues have no real understanding of what you do, they negotiate for results rather than collaborate for performance, often to the detriment of everyone. Image the executive team tasked with increasing revenue by 50%. Everyone agrees that a new product could be instrumental in achieving this goal. Unfortunately, the VP of Engineering claims that it will take four quarters to build it (actually he knows it can be done in three, but this is a negotiation after all). So, why not just pull out all the stops and do it in one and done. After some haggling, everyone settles on two quarters as a





'reasonable' compromise and engineering embarks on a six month death march where the project team is forced to work days, nights, weekends and holidays to compress nine months of work into six months. Agile methods eliminated death marches in the software industry through the powerful combination of agility and transparency.

Agile marketing transparency implies that plans, risks and progress be visible to everyone inside and

**“ It is easy to measure marketing quantity, but it is hard to measure marketing quality. ”**

outside the marketing department. Decisions are achieved through consensus based on reality. No hedging, no negotiations, just the facts. In the end, finished valuable work is the ultimate metric. Transparency refocuses work relationships on performance rather than politics. It may not be possible to deliver that new product in six months while simultaneously

burning out your product development team, but by working incrementally, it may be possible to deliver something of significant value in even less time. Transparency maximizes immediate value through constructive collaboration and realistic expectations. Perhaps more than any other agile marketing principle, transparency demonstrates the essentially cultural nature of agile marketing. Transparency requires and reinforces an environment of mutual trust, collaboration and shared risk to achieve a common goal: more customer value faster.

The four preceding agile marketing principles strengthen and leverage each other. Incremental work increases your ability to manage uncertainty by broadening your options. Managing uncertainty by focusing on things that can get done now and have value in the eyes of the customer ensures the options you choose are the right ones. Transparency and collaboration toward the common goal of delivering customer value eliminates waste and uncertainty by reducing negotiations and political distractions. Together, these agile marketing principles dramatically increase marketing throughput and flexibility, while creating a foundation for continuous improvement.

## **Agile Marketing Principle #5**

### **Improve Iteratively and Continuously**

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“Those who cannot remember the past are condemned to repeat it.” This famous assertion by the philosopher George Santayana is as applicable to marketing management as it is to political history. Does your marketing organization have a marketing memory? Is it shared by the entire team? Or, does each marketing team member have her own plan, her own metrics, her own rolodex and her own private stash of important marketing artifacts.

The good news is that the four preceding agile marketing principles naturally produce the shared marketing memory that is the foundation of continuous improvement. Working incrementally creates detailed project management records. Managing uncertainty requires a standardized approach to decision making that involves reviewing and revising those records on a regular basis. Pervasive customer feedback creates an every growing marketing knowledgebase. A culture of transparency ensures that knowledge is shared



throughout the entire marketing organization. Shared marketing memory makes it possible to build on past learnings rather than repeat past mistakes. Each new increment of customer value builds iteratively upon the last to create a continuously learning, improving agile marketing machine.

## The Future of Agile Marketing Management

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Agile marketing is still in its infancy. There are no widely accepted standards for agile marketing management. While some early adopters have experimented with SCRUM, SCRUM remains an agile methodology designed for software engineering. It adapts nicely to simple marketing projects like producing a brochure and weekly website improvements, but falls far short on more complex marketing projects like a trade show or a product launch.

“ Agile marketing cannot be managed by spreadsheet. ”

Agile marketing cannot be managed by spreadsheet, but unlike like sales, support, engineering, finance and human resources, there is no standard enterprise system for

managing marketing, let alone agile marketing. Like spreadsheets, most modern marketing tools are designed for individual productivity and create islands of information that exacerbate the problem.

If we marketers want to cure the recurring ills of messy marketing execution, misunderstood marketing value, and poor marketing credibility, then we must develop the marketing management practices and enterprise marketing systems that eliminate their root causes. The promise of agile marketing is great, but much work remains. The future of agile marketing management is ours to decide.

## About the Author

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Joel York is the CEO and founder of Markodojo and a respected thought leader in the SaaS community. He shares his knowledge of SaaS marketing strategy on the popular blogs Chaotic Flow and Cloud Ave. Prior to starting Markodojo, Joel was a career CMO and built multiple marketing departments from startups to hundreds of millions of dollars in revenue. Joel got his first exposure to agile at Deloitte Consulting. A lifelong student of agile principles, Joel has applied agile methods in marketing, engineering and manufacturing. Joel holds a BS in Physics from Caltech, an MS in Engineering Physics from Cornell and an MBA from the University of Chicago.

## About Markodojo

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Markodojo marketing management software-as-a-service helps marketers simplify complex, cross-functional business processes in the face of uncertainty to maximize throughput, increase flexibility and enable continuous improvement. Markodojo is currently in private beta with a general release planned for mid-year 2015.

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