GETTING STARTED WITH AGILE MARKETING

By Jim Ewel
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What is Agile Marketing?

Agile marketing takes its inspiration from Agile Development. In 2001, 17 programmers gathered at a ski resort in Utah and came away with the Agile Development Manifesto, which they published to the world. This manifesto was a statement of values and principles that sought to unite a number of alternatives to traditional software development methodologies. This manifesto, as well as the practices of agile development, have helped developers develop software that is more responsive to customer needs, delivered on time and with more predictability.

<table>
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<th>Agile Development Values</th>
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<tr>
<td>Individuals and interactions over processes and tools</td>
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<tr>
<td>Working software over comprehensive documentation</td>
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<tr>
<td>Customer collaboration over contract negotiation</td>
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<tr>
<td>Responding to change over following a plan</td>
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Some of these values can apply to marketing, as a number of practitioners have pointed out. Scott Brinker, in an article entitled “Ideas for an agile marketing manifesto”, suggests that both the first and the last of the four values above apply to marketing. He also suggest four other values:

- 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

Back in 2006, Matt Blumberg of Return Path wrote a post about their efforts to use an agile development tool, Rally, to track marketing activities. Frank Days of Novell wrote a blog post with the intriguing title “Sex and the Agile Marketer” comparing traditional approaches to marketing with the agile approach. Neil Perkins has a summary of agile marketing on his blog “Only Dead Fish”. And Greg Meyer takes a shot at describing an Agile Marketing set of principles on his blog.

What all of these articles have in common is the desire to make marketing more transparent, more accountable, more productive and better able to adapt to change. Until a group of marketers get together and issue an agile marketing manifesto, there is no agreed upon list of agile marketing values, so we’ll each have to make our own. Here is my list:

**Agile Marketing Values**

- **Responding to change** over following a plan
- **Testing and data** over opinions and conventions
- **Numerous small experiments** over a few large bets
- **Engagement and transparency** over official posturing
- **Getting out of the building** over formal market research

Beyond values, the agile marketer must also bring some structure and processes to the marketing task. If this seems in conflict with the first value espoused above (responding to change over following a plan), it isn’t. In the end, good marketing comes down to the actions and instincts of people and teams – but without some process and tools, marketing falls back to being soft, unpredictable and a black box to others.
The process of agile marketing is iterative. It must accommodate change. Out of the agile marketing process, new feature requests and changes to the product spin out. Revisions to the Agile Marketing Model may also result from observations made during the process. In the next few pages, we’ll take a look at each of these areas in turn.
What is the Agile Marketing Model?

One of the best books I’ve read in the last few years is “Business Model Generation” by Alexander Osterwalder & Yves Pigneur. The book provides a diagram and a process for describing a company’s business model. Ash Maurya, a Lean Startup practitioner, has adapted and improved Osterwalder & Pigneur’s model in his book “Running Lean” and the accompanying Lean Canvas. I’ve built my Agile Marketing Model based on their work, and couldn’t have done it without them.

Before embarking on any marketing efforts, the team must agree upon an Agile Marketing Model. This is a critical first step. Embarking on a Marketing Sprint without first clarifying your customer segments, unique value proposition, or key metrics is like going on a run without picking a direction and a destination – you’ll get somewhere, but it may not be anywhere you want to be.

One other important point: your Agile Marketing Model starts off as a hypothesis, your best guess at what it is or should be. You must prove it out, and it will change over time as you learn more about your customers and as market conditions change. It must be a living model, not a static diagram that is completed and then tucked away in a drawer. To that end, every Sprint should have testable hypotheses. We’ll cover how to create testable hypotheses in a later section of this document.

Agile Marketing Model

OFFER

Solution

Unique Value Proposition

GO-TO-MARKET

Channel/Partners

Customer Touch Points

CUSTOMER

Customer Segments

Problems & Aspirations

MONEY & MEASUREMENTS

Marketing Spend

Key Metrics

Revenue Streams
Customer Segments

When creating a marketing model for your business, start by identifying the various customer segments that your organization sells to today, and the customer segments that you would like to sell to in the future. Be as specific and detailed about these customer segments as necessary.

Groups of customers fall into different segments if they have different needs, behaviors or buying patterns. If they use your product or service in different ways, or require slightly different sets of features, they are in different segments.

Start out by listing customer segments on sticky notes and posting them. Then get agreement by all the stakeholders as to how you refer to each customer segment, and how you define it. And then you must test your hypothesis that these are the right segments in the real world, and make sure it is accurate.

You may also decide to create Personas for each target customer. If you do decide to create personas, I suggest reading the work of Karen Holtzblatt, particularly Rapid Contextual Design. There is also a wonderful introduction to personas [here].

Problems & Aspirations

Identify the top 1-3 problems for each customer segment. While different customer segments may have overlapping problems, often they aren’t identical. These problems should be specific, and they should be painful.

Don’t simply dwell on the negative side of your customers needs, wants and desires. Customers have aspirations, and products which fulfill these aspirations can be very successful in the marketplace.

Some of the most successful brands in the world address aspirations, not problems. Apple certainly falls into this category, but so do brands like BMW, Porsche, Rolex and Starbucks.
Describe your solution not just in terms of the key features, but also in terms of the benefits to the core customer segments. The key here is to get agreement among the marketing group in respect to the language that you use to describe your product. This will ensure that you are getting some SEO benefit by consistently using the same keywords to describe your solution.

You may also want to describe your solution in terms of Geoffrey Moore’s Whole Product concept, including all of the ancillary products and services the customer needs to get the full benefit of your product.

Identify the unique value proposition (UVP) for each customer segment. Why do customers choose you over the competition? What aspects of the problem are you uniquely suited to solve for each customer segment? What is your strongest selling point?

Don’t forget to include the emotional component of your value proposition. What makes your product or service an emotional buy? Are you appealing to fear? Greed? Aspiration?

You must agree on the UVP, and you must validate it, because your sales pitch and all your marketing materials will reinforce the value proposition. It is one of the hardest things to get right, and one of the most valuable assets you have once you get it right.

There are many formats for writing value propositions, including the one below, by Geoffrey Moore, and the simpler “We help X do Y by doing Z” form by Steve Blank. Whichever format you use, you’ll need to reduce it to a “hook”, that anyone can understand and easily remember.

For: (bulls-eye customer)
Who: (key purchase motivation insight)
Our product is a: (customer language)
That: (key benefit)
Unlike: (key competitors)
Ours: (key differentiators)
At a price: (less than, equal to, or higher than competitors)
You should also define your unfair competitive advantage. This is some aspect of your company or your offering that no one else can offer, and if the customer values this property, it’s like bringing a gun to a knife fight when you compete with your competitors.

For example, Apple’s unfair competitive advantage is their attention to every design detail and their control over the user experience, which often leads to a better user experience.

Google Android responded with the unfair competitive advantage of openness and choice, which often leads to a lower price for their phones. Depending on what the customer values, each has a potential unfair competitive advantage.

For most companies, their unfair competitive advantage will be incorporated into their unique value proposition. Occasionally, an unfair competitive advantage will not be something customers value – patents or high switching costs, for example. In that case, it will not be part of the unique value proposition.
Go-To-Market

Channel/Partners

How will your product reach customers? Will you have a direct sales force? Will you sell through business development deals or channel partners? Will you sell through something like the Apple App Store or Android Market?

What role do your channels play in your marketing? How do you market to your partners?

How will customers become aware of your offering? Where are your customers searching now for solutions to their problems? How do you ensure that you’re there when they are searching?

Sean Ellis, in his startup-marketing.com blog, advises starting with free channels and working your way up to more expensive channels. Here’s his list:

<table>
<thead>
<tr>
<th>Channel</th>
<th>Cost/user</th>
<th>Scalability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viral/referral</td>
<td>Free</td>
<td>High</td>
</tr>
<tr>
<td>Email (internal)</td>
<td>Free</td>
<td>Organic</td>
</tr>
<tr>
<td>Blog</td>
<td>Free</td>
<td>Organic</td>
</tr>
<tr>
<td>SEO</td>
<td>Free or Paid</td>
<td>High</td>
</tr>
<tr>
<td>Widget</td>
<td>Free or Paid</td>
<td>Organic</td>
</tr>
<tr>
<td>Biz Dev/Partners</td>
<td>Free or Paid</td>
<td>High</td>
</tr>
<tr>
<td>Domains</td>
<td>Paid (low)</td>
<td>Low</td>
</tr>
<tr>
<td>PR</td>
<td>Paid (low)</td>
<td>High</td>
</tr>
<tr>
<td>Email (external)</td>
<td>Paid (TBD)</td>
<td>High</td>
</tr>
<tr>
<td>SEM</td>
<td>Paid (TBD)</td>
<td>High</td>
</tr>
<tr>
<td>Contest</td>
<td>Paid (TBD)</td>
<td>Organic</td>
</tr>
<tr>
<td>Affiliate/lead gen</td>
<td>Paid (TBD)</td>
<td>High</td>
</tr>
<tr>
<td>Radio</td>
<td>Paid (TBD)</td>
<td>High</td>
</tr>
<tr>
<td>TV</td>
<td>Paid (TBD)</td>
<td>High</td>
</tr>
</tbody>
</table>

Touch Points

Marketers today must engage with customers at multiple touch points. A company’s website, Twitter feed, Facebook page, Google+ brand page, direct sales force, human resources, customer service function, forums, PR, events, word of mouth, advertisements, and contests are all opportunities to improve or destroy the customer relationship.

Define these touch points, prioritize them and determine how you’re going to measure the health and effectiveness of each touch point.

Every interaction with a customer is an opportunity to tell your story. Is your messaging across all your channels consistent? Is the customer experience consistent and reinforcing your positioning? Are there opportunities to cross-sell or to gather referrals?
Money & Measurements

Key Metrics

What are the overall success metrics for marketing? These must be agreed upon with management and other stakeholders. These should be the long term metrics that marketing is measured by, not metrics for an individual campaign or sprint.

One place to start getting ideas for metrics, particularly for businesses that have an online component, is Dave McClure’s “Startup Metrics for Pirates”. Dave coined the acronym AARRR for tracking the key metrics in the customer lifecycle.

- **Acquisition**: users come to the site from various channels
- **Activation**: users enjoy 1st visit: “happy” user experience
- **Retention**: users come back, visit site multiple times
- **Referral**: users like product enough to refer others
- **Revenue**: users conduct some monetization behavior

![AARRR!](image)

Marketing Spend

This is where you list the amount of your planned marketing spend. In keeping with the value of responding to change over following a plan, this does not have to be broken down in any great detail, and may simply be a single number. The main purpose of listing this number on the marketing model is to compare it to the success metrics to the left. You’ll want to make sure that you’re delivering strong positive ROI on your marketing spend.

At some point, after a sprint or two, you may want to start taking a look at the ROI of various kinds of marketing (trade shows versus direct mail, for example) and re-allocate your spend to those marketing channels delivering greater return.

Revenue Streams

What are the different sources of revenue in your company? For example, you may have product revenue, advertising revenues and/or services revenues. Document each revenue stream.

Ultimately, marketing success has to come down to revenue. If you’re not getting more than a dollar of sales for every dollar spent on marketing, why do it? There are other top of the funnel and middle of the funnel metrics that may be important to measure, but don’t allow these to be soft metrics like mind share, consideration or unaided recall.
<table>
<thead>
<tr>
<th>Problems &amp; Aspirations</th>
<th>Solution</th>
<th>Unique Value Proposition</th>
<th>Customer Touch Points</th>
<th>Channel/Partners</th>
<th>Customer Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional video cameras are too bulky and too difficult to use</td>
<td>A camera that can fit in one hand</td>
<td>For: Soccer moms</td>
<td>Website</td>
<td>Electronics retailers</td>
<td>Soccer moms</td>
</tr>
<tr>
<td>Always losing the cord; difficult to upload videos</td>
<td>So easy to use it only has one button</td>
<td>Who: want to document and share family moments</td>
<td>Commercials</td>
<td>Online retailers</td>
<td>Young singles</td>
</tr>
<tr>
<td>Aspire to easily share videos with friends and family</td>
<td>Built-in USB connector you can’t lose; very easy to upload videos</td>
<td>Our product is a video camera</td>
<td>PR</td>
<td>Direct</td>
<td>Casual video takers</td>
</tr>
<tr>
<td>Aspire to spontaneously take videos of memories of kids, friends, family</td>
<td></td>
<td>That: makes it easy to shoot and share videos</td>
<td>Twitter, Facebook</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Key metrics**
- Sales
- Videos shared through FlipShare
- Visitors to web site
- Time visited

**The World’s simplest shoot and share video cameras**

**Marketing Spend**
- $500K per month

**Revenue Streams**
- Camera sales
- Subscriptions to FlipShare
Sprint Planning Meeting

The sprint planning meeting happens before each sprint, and its objective is to get agreement on the goals of the sprint, the various projects that will be accomplished during the sprint and initial assignment of responsibilities. The duration can be anywhere from 1 hour to a full day.

Roles
Business owner(s) – own business, negotiate goals with team
Scrum master – owns schedule, runs daily scrum meeting
Players – members who are executing marketing tasks
Fans – interested parties

Agenda

1. Establish basic parameters – start and end date of sprint, availability of team members (plan for vacations, training, conflicts), resources available (budget)

2. Desired scope – business owners state their desired goals (leads, incremental revenue, visitors to web site, etc). Players and business owners list projects on sticky notes that contribute to goals; post them on board and rank them. The group also discusses any assumptions contained in the marketing model, and decides which ones to test.

3. Estimation – 10-20% of resources are set aside for the unexpected. Estimates of both time and money are stated by the players for each project in rank order. Projects are accepted until no more resources are available for current sprint. Remaining projects are placed in the backlog.

4. Sprint poker – players and owners revisit the desired goals and negotiate what is realistic, given the accepted projects in the estimation section above.

5. Assignments – players are assigned responsibilities and interim due dates.

6. Agreement – The goals and list of committed projects are confirmed in writing between the players and the business owners.

How long is the typical Sprint?
While there is no “right” answer, I notice that most marketing sprints are 4-6 weeks long, sometimes with a formal mid-term sprint assessment meeting. It needs to be long enough that you can start to see some of the results of the marketing activities. This may vary depending on the type of sales channel. Online businesses may see results faster than those with a direct sales force and long sales cycles.
Generating Testable Hypotheses and Conducting Experiments

Eric Ries, on his blog and in his new book The Lean Startup, introduces the concept of the testable hypothesis, applying the scientific method to answering the hard questions faced by startups. This concept can be applied to businesses of all sizes, and at any stage of development.

If you look at your marketing model, what are some of the underlying assumptions? Which areas of the marketing model are most ripe for improvement? Put another way, in which area might a change have the greatest impact? Here are some example questions, but please don’t limit yourself to just these questions. You know your business best. Follow your intuition to find the areas where changes can have the greatest impact.

Questions

- Where did you spend your marketing dollars over the last twelve months? If you were to start over constructing a marketing budget, how would you allocate the dollars? Which spends are leading to the greatest return?
- Are there additional customer segments that you could target?
- Are there other potential revenue streams available to you?
- Which channels/partners are most effective? Would allocating expenditures differently among different channels have an impact?
- Which customer touch points are working well? Which aren’t? Where should we put more focus?

Asking and answering these questions should start generating points of view, or hypotheses. For example, “If we cut our trade show budget and took that money and put it into direct mail marketing, we would generate more leads.”

Every hypothesis needs to be testable. The group should establish clear criteria for determining the success or failure of each hypothesis. Using our last example, a testable form of the hypothesis might be “By re-allocating $5000 from our trade show budget to direct mail marketing, we will generate 200 more leads in the next 6 weeks.”

Note that for every hypothesis there needs to be a baseline (however many leads were generated previously in a typical 6-week period), a metric (200 more leads) and a time period (6 weeks).

Lots of marketing groups perform A/B testing of marketing copy, Adwords headlines, landing pages, etc. This is important, and can improve your business by measurable percentage points.

But to have the greatest impact on your business, it is often necessary to question some of the key assumptions of your business, and test them, initially in small ways, but as you learn, in ways that can be business-changing.
The Role of Scrum in Agile Marketing

Scrum is at its heart a project management methodology. It was developed to manage software development projects, but with just a few tweaks, it can be used to manage marketing projects.

You’ve already been introduced to some of the principles of Scrum on the previous page: defined roles (owner, scrum master, players, fans) and the Sprint planning meeting. This page will focus on another key element of Scrum, the daily scrum or standup meeting.

Daily scrums are time-boxed, generally for no more than fifteen minutes. Each player reports out on three things:

- What they did yesterday
- What they will do today
- Any obstacles that stand in their way

Do scrum meetings have to take place daily or is it OK to have them every other day or perhaps just once a week? Once a week is not often enough. While I’ve certainly seen successful teams hold scrum meetings 2-3 times weekly, rather than daily, the daily meeting is a good habit to establish. It increases communication and ensures that any issues get caught quickly, before they’ve had a chance to get out of control.

A few tips:

- Keeping it a standing meeting keeps it short
- Make sure everyone comes. Fine those who miss meetings
- Reserve the room and post the task list and progress chart in the room
- Make the meeting about team communication and not a report back to the scrum master

Jason Yips of ThoughtWorks has written a very good article about daily scrums [here](#).
Measurement, Iteration and integration

Earlier, I talked about some of the values of agile marketing: continuous improvement, measurement, accountability and getting out of the building. It is here, during the sprint, that these values lead us to some of the key activities of agile marketing.

Measurement and Iteration

Every marketing activity during the sprint should have some metric of success. The metric should be established in advance, and measured as frequently as is reasonable during the sprint. For many marketing activities, it makes sense to test multiple versions, either through strict A/B testing or more informal variation of a single variable and comparison of results. Landing pages, headlines, offers, audiences, time of day, channels, messaging can all be tested, the results measured, and through iterations, the impact of your marketing can improve over time.

In this introduction, I don’t have space to discuss the ins and outs of A/B testing, multivariate analysis or landing page optimization. There are many tools out there and many companies that specialize in these activities. For more information, you can check out whitepapers at Ion Interactive or Future Now.

Integration

A single marketing tactic in isolation seldom works as well as an integrated approach across several different channels. If a prospect encounters the same message through PR, an online advertisement and word of mouth, they are much more likely to respond than if they see the same message an equal number of times in one channel. Think about multiple ways to get your message out, and make sure that the message is consistent and focused across different channels.

Note that the effects of integrated marketing can present some challenges to measurement of the effectiveness of various channels. Microsoft’s Atlas group and others have done extensive research on the digital purchase funnel and the tendency to over-emphasize the contribution of the “last click”. In many cases, while search engine marketing may get credit for the conversion because it is the last click before the landing page, the consumer would never have converted without earlier exposure to the companies message in other mediums. For example, a customer may have first become aware of a brand through a social media conversation, became further attuned to the message as they browsed familiar sites with relevant display advertising, and then finally, just before the moment of purchase, searched for the product name in a search engine. It would be inaccurate to attribute 100% of that conversion to search engine marketing, and pull all marketing budget from other channels.
Real-Time Marketing

One of my favorite authors is David Meerman Scott. He’s written many books, but two of my favorites are “Real-Time Marketing and PR” and his latest E-book, “Newsjacking”. Both books support the thesis that marketing can no longer execute at a leisurely, planned pace. There are times when marketing must move at the speed of events in the marketplace: whether those events are competitive threats, potential brand-damaging screw ups, or opportunities to take advantage of breaking news.

This is why 10-20% of the resources available for a given sprint are set aside for the unexpected. These resources can be used for Online Reputation Management and for responding to breaking news.

Online Reputation Management (ORM)

Online reputation management is the process of managing a company or brand’s reputation by monitoring news, reviews, blogs and comments about the company or brand, and responding to them in real-time, with the goal of improving the reputation or minimizing the damage to the brand of negative publicity, particularly negative PR that goes viral.

Pre-internet, word of mouth, even bad word of mouth, tended to travel slowly. Only negative issues that were big enough to hit the mass media effected brands. The last 10 years, however, have seen brands damaged when they failed to be responsive to even a single customer.

In 2008, a Canadian musician named Dave Carroll failed to get compensation from United Airlines after they broke his $3500 guitar, which was checked as baggage. He and his band made a video, which went viral, achieving over 11 million views. United was slow to respond, and even a belated offer of $3000 in compensation failed to restore United’s reputation.

A similar PR disaster befell Dell Computer in 2005 when a somewhat influential blogger named Jeff Jarvis wrote about his experience in “Dell Hell”, dealing with a balky computer and a unresponsive Dell service department.

Much has been written about how to best manage a company or brand’s reputation online, and there are a number of companies that specialize in ORM, as it is known. Most of these companies provide modified SEO techniques, moving bad news off the first few pages of Google search results by improving the search ranking of “good” news.

But ORM is much broader than simply manipulating Google search results. Rob Stokes of the Quirk agency has written a great summary of ORM in their eMarketing textbook. He recommends a 4 step approach to Online Reputation Management:

- **Monitor** – monitor mentions of your company, its brands, management, products, competitors and industry.
- **Measure** – establish baseline metrics of negative/neutral/positive mentions and follow these as they change over time.
- **Engage** – respond to negative comments with speed, humility, care, humanity and authenticity. Where possible, engage with the community before there is a problem.
- **Evolve the business** – close the feedback loop by evolving the business to prevent the problem from happening again. Learn from it.

Newsjacking

Newsjacking is the practice of hijacking or drafting behind breaking news to get coverage for your brand or message. It requires reacting in real-time to a breaking news story. David Meerman Scott gives a number of examples in his E-Book on Newsjacking, but my favorite recent example involved Greyhound Bus Lines and the actor Alec Baldwin. Baldwin was thrown off an American Airlines flight for using his cell phone after they had pulled away from the gate. In his letter of apology to his fellow passengers, he took a number of swipes at American Airlines, likening travel on them to “a Greyhound bus experience”. The next day, Greyhound issued a press release inviting Mr. Baldwin to travel on their much improved buses, suggesting that he could use his cell phone the entire trip.
Sprint Review Meeting

The Sprint Review Meeting is the bookend to the Sprint Planning Meeting. Again, the business owner(s), players, fans, and scrum master assemble. The purpose of the meeting is to review the commitments made at the sprint planning meeting, the work completed and the results. Typically the scrum master begins by presenting the goals and the committed projects for the sprint, followed by team members showing the completed work and talking about the results.

Business owners may comment during the presentation and ask questions. At the end, it is common to poll each business owner and any other relevant stakeholders to get their feedback on the sprint and the results.

The sprint review may also identify uncompleted work or suggestions for new work that are added to the backlog for consideration at the next sprint planning meeting.

Sprint Retrospective

Unlike the sprint review meeting, which talks about what was accomplished during the sprint, the sprint retrospective talks about how things went during the sprint. Each participant answers two questions:

- What went well during the sprint?
- What could have been improved during the sprint?

In traditional agile development, the product owner is optional at this meeting. I suggest that only the scrum master and the players attend, not the product owner or fans. This seems to facilitate open discussion and build team cohesiveness.

The role of the scrum master is not to lead the critique, but to help the team with discussion and prioritization. If the sprint did not go well, it is sometimes helpful to bring in an outside facilitator to guide the discussion.

Here are some other specific questions to be discussed at the retrospective:

- Did the completed projects achieve the results?
- Which activities were most cost-effective? Which least?
- How did the process itself facilitate things getting done? Are there things that could be done to make the process simpler?
- What synergies were there between different marketing activities? Were there opportunities for additional synergies?
- How did the team function? Was it self-organizing (one of the principles of agile development)? Did it get the support it needed from the business owner(s)?
- Were changes introduced during the sprint? How were those changes handled?
- How did the velocity (the pace of getting things done) compare to previous sprints? What would increase the velocity? Is the velocity sustainable?
Agile Product Planning

Agile marketing works best when the development team is using agile development techniques. Both teams use the same or similar tools, they have visibility into each others work, and their work can be mutually reinforcing. Early and frequent releases encourage greater engagement with customers and give the marketing group opportunities to communicate both to existing customers to drive upsells or renewals, and to communicate to prospects to drive purchases.

Roman Pilcher has written an excellent book on Agile Product Management. In this blog article, he summarizes some of the differences between traditional product management and agile product management, which I’ve summarized below:

<table>
<thead>
<tr>
<th>Traditional</th>
<th>Agile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple owners</td>
<td>Single owner</td>
</tr>
<tr>
<td>Detached product managers</td>
<td>PM is part of team</td>
</tr>
<tr>
<td>Extensive up front work</td>
<td>Get the vision right; iterate</td>
</tr>
<tr>
<td>Requirements frozen early</td>
<td>Requirements emerge</td>
</tr>
<tr>
<td>Customer feedback late</td>
<td>Customer feedback early</td>
</tr>
</tbody>
</table>

There are five areas in particular where product marketing and product planning overlap:

**Vision**

Product marketing and product planning need a shared vision. The product vision must include the following:

- Who is the target audience(s)?
- What problems does it solve for them? What is the value of solving those problems?
- What features and/or product characteristics are key to the value proposition?

A crisp product vision is particularly important for agile development as it ties together the ongoing iterations and it helps prioritize features and guide design trade-offs over the long haul.

**Buyer and User Personas**

Personas promote shared understanding between the product marketing and the product planning team of the important characteristics of the target audience. Personas should provide enough detail to guide development choices and marketing messages, while preserving enough generality to ensure that the persona represents a class of users. Although for some products the buyer and the user will be the same person, for many products (e.g. diapers), the buyer is a different persona, responsive to different features and different messages.

**User Stories**

Because of their outward focus, product marketing is often in the best position to articulate stories about how users use the product in different scenarios. These user stories help flesh out user personas and guide development in developing new features and functionality.

**Win/Loss Analysis**

Both product marketing and product planning should participate in win/loss analysis. Although companies like Apple have certainly shown the value of focusing on customers rather than competitors, avoiding the creativity sapping “feature chase”, some understanding of why the product is succeeding or losing with buyers is necessary to the success of any organization.

**Product Portfolio**

Different audience segments and strongly different usage scenarios often dictate multiple products, rather than a single product that tries to be all things to all people. Product portfolio strategy can simplify development, tighten up product messages, and often maximize revenue. Product marketing and product planning should be in agreement about the product portfolio and discuss when new products are appropriate.
Getting Started

Certain areas of marketing lend themselves more easily to agile marketing than others, and it may make sense to get started in one of these areas: digital marketing, email campaigns, case studies, collateral, microsites, social media campaigns, lead generation, event support and channel training. Other areas of marketing do not lend themselves as well to agile marketing: positioning, pricing, market definition, competitive analysis, product roadmap.

Start small, with a group of 4-7 marketers, and make sure that everyone understands agile marketing and is excited about trying out agile as a methodology. Also make sure that everyone is trained in the basics, and comfortable using the tools.

You will probably spend extra time in the sprint planning, sprint review and sprint retrospective meetings, as everyone is new to the process. Allow for this extra time. Have your scrum meetings in the same place every day, and make sure that you have a prominent visual artifact of the work: a white board or a kan-ban board with a row per team member and Post-It notes with user stories and tasks or a large print out of the Ready tasks, in process and finished tasks from your software. For your first iteration, try to make sure that everyone is local, rather than part of a geographically-distributed team.

Selling Agile Marketing to Management

It’s critically important early on to get the support of senior management. Without their support, Agile Marketing becomes just another project management tool, and you’re missing out on at least 50% of the value of the agile marketing approach.

If asked by someone from the C-Suite, why agile marketing, the simplest answer boils down to just three words:

**Speed** - On the highway, speed kills, but in business, it is slowness that kills. Companies that are slow to respond to competitive threats, companies that are slow to respond to customer complaints, companies that are slow to change when something is not working – these companies fail.

Agile marketing addresses the need for speed by proceeding in a series of rapid sprints, reviewing at the end of each sprint what worked and what didn’t, and adjusting as necessary. Agile marketing also acknowledges the need to set aside resources to respond to the unexpected – whether the unexpected is driven by customers, competitors, or current events. As the agile marketing manifesto might put it, we value responding to change over following a plan.

**Alignment** – nothing destroys a marketing effort than misalignment with executives or the sales staff. If not aligned with management and the sales team, marketing focuses on activities and metrics that have no value to the rest of the business.

Agile marketing encourages alignment by beginning each sprint with a Sprint Planning meeting. Management and sales outline the results that they’d like to see; marketing sizes the tasks and the budget required to achieve these results, and a negotiation occurs before the sprint takes place.

The tools and processes of agile marketing also encourage greater communication with management and sales, so there are fewer surprises and a greater understanding of marketing’s contributions.

**Engagement** – Marketing departments that get out of touch with their customers soon lose their way. Imagine driving down the highway at 100 miles per hour and closing your eyes — the result, whether driving or marketing while out of touch, are likely to be a crash and burn. Engagement is critical to marketing success.
Tools

There are many software tools on the market for managing Agile teams. Most of them are oriented towards Agile Development teams, but a few are suitable to managing Agile Marketing teams as well. Here are the ones that I’ve tried.

Trello
Trello is my favorite for individual use. It consists of a simple Kanban board, with three columns: To Do, Doing and Done. Adding a new task is as simple as typing and hitting the return key. To mark a task complete, you simply drag it over to the Done column. It also supports teams and some more complex features, but I primarily use it for my at home tasks.

Asana
Asana is very easy to use and intuitive. You can add projects and tasks with a minimum of keystrokes and without filling out forms. You can also see what each team member is working on, and easily pass of tasks to other team members. It’s a great team tool.

Moovia
Moovia uses Agile terminology like Sprint, tasks, burndown chart, backlog, etc. It also has a “cockpit” where you can see your tasks, events and anything that project members posted on the “wall”. I find it a bit more cumbersome to use than Trello or Asana, requiring filling out forms and just generally slowing down listing out my tasks.

AgileZen
AgileZen is a Kanban board for teams. I don’t find it quite as intuitive for individual use as Trella, but it does have some powerful features. For example, it allows you to measure throughput, and also to quickly look at how many stories are in the backlog, how many are ready to be worked on, how many are in progress and how many are completed, all in a glance.

Leankit Kanban
Leankit Kanban is another product based on the Kanban board. Like Moovia, it requires you to fill out a form to add a task, rather than the easier interfaces favored by Trello and Asana. It does have some unique features, including templates for different style Kanban boards, as well as a mobile version. I can’t say that I find its interface very attractive, but that may be a matter of personal taste.

Of course, the other alternative is to not use software at all, but to use a whiteboard and a set of stickies. The main advantage to this method is that there is something very satisfying in physically moving a task from doing to done, and everyone can see the progress by the number of stickies that accumulate in the done column.
Resources

If you want to learn more about agile marketing, here are some resources you can turn to:

**Agile Marketing Blog** – Frank Days and John Cass blog and podcast about all things agile. Their monthly interviews with practitioners of agile marketing are particularly good.

**Rohn-Jay Miller** has a great page of resources on his blog that cover both Agile Marketing and Agile Planning. Make sure you scroll all the way down to see his list of articles. Very useful.

**Neil Perkin’s Only Dead Fish** has a great set of resources on Agile Planning (applying Agile to all aspects of modern business, not just development and marketing).

**Made by Many**, an innovative agency out of the UK, blogs on their use of Agile for the creative process. I particularly like Tim Malbon’s presentation “Let’s Kill Landfill Marketing”

**Webinars** – Marketbright has several webinars on agile marketing. Although their primary purpose is to promote products, they provide some good material on agile marketing in these webinars. Marketbright has also written a book called Nurture Marketing for Dummies that covers many techniques for nurturing customers through the sales funnel. This book is available for free (in PDF format) on their web site.

**Measurement** – One of the key characteristics of agile marketing is the importance of setting specific, measurable goals for each sprint. A good book on measuring marketing performance is Marketing Metrics by Paul Ferris. In addition to covering common measures of marketing effectiveness such as market share, awareness, customer satisfaction, click through rate, etc. they also describe some less common metrics such as brand development index (BDI), heavy usage index, willingness to recommend, customer lifetime value and return on marketing investment (ROMI).

**Product Management** – Although product management is just one part of agile marketing, it is an important part. Roman Pichler has written a very comprehensive book on agile product management, entitled Agile Product Management with Scrum: Creating Products that Customers Love. He covers the product owner role, creating a vision for the product and many of the details of working with the product backlog. He also explains many of the specifics of holding sprint planning meetings, the daily scrum, sprint reviews and the sprint retrospective. Although the focus is more on product development than on marketing, much of the advice also applies to agile marketing.

**Other Blogs** – Although it’s aimed at startups, Startup Marketing Blog by Sean Ellis is a great resource for agile marketing ideas and practice. In particular, check out his posts on metrics driven marketing. While we’re on this subject, one of the classic presentations on metrics driven marketing is Dave McClure’s Startup Metrics for Pirates. Check it out.

**Ghennipher Weeks** has recently written two articles about Agile Marketing, found here and here. I particularly like her image of the use of Kanban boards to manage agile projects.