THE

6

DISCIPLINES

OF

AGILE MARKETING

PROVEN PRACTICES FOR MORE EFFECTIVE MARKETING AND BETTER BUSINESS RESULTS

JIM EWEL

Praise for *The Six Disciplines of Agile Marketing*

"*The Six Disciplines of Agile Marketing* provides a comprehensive guide to the principles, practices, methods, and mindset of Agile Marketing. If you have a question about how a particular Agile approach (such as Kanban or Scrum) or Agile principle (such as embracing change) applies to the world of marketing, you are certain to find an answer here. Best of all, you'll never lose sight of *why* these ideas are so critical and relevant for modern marketers."

<p align="right">—Matt LeMay, Cofounder and Partner at Sudden Compass,
Author of Agile for Everybody</p>

"This book distills years of experience practicing and teaching agile marketing into a pragmatic guide for leaders and practitioners. The insights within could only have emerged from an iterative process adapting the agile approach to marketing organizations and will help you speed adoption at your company."

<p align="right">—Roland Smart, CMO/COO DBT Center of Marin,
former VP of Social and Community Marketing, Oracle,
author of The Agile Marketer: Turning Customer Experience
Into Your Competitive Advantage</p>

"Even with my twenty years of experience in the ad business, I have been inspired by Jim's amazing breadth of real-world experience and his drive to create real, forward momentum in marketing practices for today's complex environment. Jim's experience and foresight has produced a body of knowledge and practices that embraces not only a total business perspective but a practical "how to", both at a team level and at an organizational level. Get the book, study it and apply its many valuable lessons."

—**Jeff Plowman,** Founder, The Super Market Business and Brand Consultancy, former EVP and Managing Director, McCann Erickson

"Moving beyond the buzzwords, Jim provides a down-to-earth yet deep and actionable take on what disciplined Agile Marketing looks like. Agile is the modern business operating system and this is a great guide to how to "install" and "tweak" it for your needs."

<p align="right">—Yuval Yeret, Enterprise Agile Consultant, AgileSparks</p>

"Jim Ewel's book *The Six Disciplines of Agile Marketing* provides a practical guide to implementing Agile Marketing in organizations of all sizes. How can companies survive and prosper in the most critical times, including the most recent COVID-19 pandemic? By using Agile to respond to changing market conditions and to innovate quickly. Read this book, as Jim brings his many years of experience to bear on the many problems facing marketing organizations today."

—John Cass, Digital strategist, founder, Boston Agile Marketing Meetup, former President, Boston chapter of the American Marketing Association
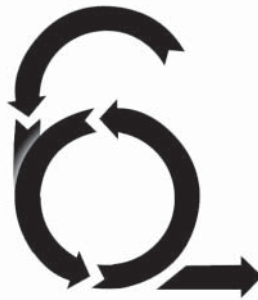
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WILEY

To my wife, Ann, whose support and encouragement made this book possible.

Contents

Foreword

It has never been a better time to be a marketer.

The explosion of technology over the past 20 years has created myriad ways for us to attract, engage, and delight customers. Thousands of marketing and technology—martech—software companies vie to empower us in ever more innovative ways. Social networks and search engines give us virtually unlimited reach.

The digital world provides us a palette that holds an infinite variety of hues; we apply them, with every imaginable brush, knife, and sponge, to a canvas as expansive as our collective imagination.

And never have we seen greater demand for this power to create.

Marketing, once a peripheral function at many companies—the "arts and crafts department," as a colleague once lamented—now sits at the center of the organization. We are the heartbeat of customer experience, delivering customer engagement to the far reaches of the organization and returning rich insights to the management brain.

We who master the art, the science, the engineering of modern marketing, can have the world at our feet.

And yet.

And yet many organizations struggle to harness this awesome creative power that sits, seemingly, beyond their grasp.

It's not because they can't afford it. Most marketing tools are relatively inexpensive, especially when we take them for a test run—the ubiquitous

"freemium" model of software-as-a-service (SaaS). And most cloud tools scale; we pay for what we use.

It's not because they lack the skills—at least the skills to wield the tools or execute digital tactics. Most digital marketing isn't rocket science: Vendors compete on user experience (UX), constantly making their products easier to learn, easier to adapt, easier to apply. And any how-to question you might have is answered instantly, from wherever you are, on Google or YouTube.

Paul Simon sang about it in 1986, and it's here now. *These* are the days of miracles and wonders.

So where is the struggle? What stands between marketing departments and digital paradise?

Management.

Of course, right? Who else takes the rap when something doesn't work?

But the problem here isn't the people in management. The problem is the process. Organizations manage marketing today with the practices and procedures of a bygone century. They yoke six horses to a jet airplane, and they roll across the prairie in a shiny metal stagecoach.

To soar in the twenty-first century, marketing needs a twenty-first-century approach; and that approach is, in a word, Agile.

The discipline of Agile management has evolved over the past two decades, from a manifesto in software-development circles to the rich set of methodologies that are now harnessed to nearly every discipline in our digital world. When applied to marketing, we call it Agile marketing. It's the secret to splitting and unleashing the power of the digital atom.

Agile marketing frees your teams to move faster and more efficiently. They'll adapt quickly to change, with little friction and fuss. They'll experiment in a focused and disciplined manner to discover opportunities. They'll continually improve—not just the work that they deliver, but the way they work together.

The teams will love their work. Really. In study after study, teams embracing Agile marketing report that they enjoy their jobs more. These happy, empowered teams produce better results.

Unlike splitting the real atom, anyone working in the digital world can split the digital atom. The intuitive principles of Agile marketing are easy to grasp and execute.

Implementing Agile marketing successfully—not just speaking the words or going through the motions of standups and Kanban boards— requires an understanding of the whole that is greater than the sum of its parts. It's a hill to climb; not because it's inherently difficult but because

it's different from how you've managed before. Here, in your hands (or on your screen), is the guide to lead you to the top of that hill.

Jim Ewel, a pioneer of Agile marketing, helped forge the discipline over the past decade. He brings a wealth of experience as a marketing executive, a CEO, a university instructor in digital marketing, and an Agile transformation leader for top brands. He has pondered the "how" and the "why" of Agile marketing, has distilled his wisdom, and has placed it eloquently into this book.

The Six Disciplines of Agile Marketing is the new classic of marketing management.

Read this book. Embrace it. Practice it. Iterate and adapt it.

You'll soon find yourself standing on the other side; and, standing there, you'll agree:

There's never been a better time to be a marketer.

– Scott Brinker
Editor, chiefmartec.com
Author, *Hacking Marketing*

Preface

Why I Wrote this Book

Business has only two functions—marketing and innovation.
—Milan Kundera, author of The Unbearable Lightness of Being

I love marketing. It's one of the most difficult and most critical jobs in any company. It's also among the least understood jobs. It's sometimes the least respected. And the way many marketers plan, organize, and manage the execution of marketing is broken.

The traditional marketing plan serves little or no purpose. We sit in end-less meetings, debating annual—or even worse, three-year—plans, without feedback from the market or from the rest of the organization. The resulting plans are long, inward-focused, detached-from-customer realities.

Do you file away those marketing plans the day you finish writing them, and never look at them again? If so, this book is for you.

The traditional marketing organization is broken. Many marketers work in silos, their loyalties and their point of view more closely aligned to their skill set (communication specialists, social-media specialists, SEO/SEM specialists, marketing technologists, advertising directors, brand managers, media planners and buyers, creatives, copywriters) than to the delivery of value to the customer. The traditional marketing organization frustrates marketers who are customer-focused and who want to get things done quickly.

Are your efforts to meet customer needs and to respond quickly to changing markets strangled by the conflicting priorities and endless handoffs and approval loops endemic to the traditional marketing organization? If so, this book is for you.

The typical campaign-based marketing approach doesn't meet the needs of modern marketers. Campaigns are planned over weeks or months, executed over months or years, and victory is declared with whatever metrics support the conclusion that the campaign was successful.

Are you frustrated by the endless meetings to plan campaigns, the vanity metrics pulled out of the air to support the conclusion that the campaign was successful, and the inability to take advantage of fleeting market opportunities? If so, this book is for you.

Marketing execution is broken. Too many meetings, too many status reports, too many work items in spreadsheets rather than tools to support modern marketing. The result is poor execution and an inability to communicate to the rest of the organization the value of marketing.

Are you the kind of marketer who wants to get things done and produce great work that is valuable to both the customer and the rest of the organization? If so, this book is for you.

Marketers face greater challenges than ever. The rapid pace of change, the shift in power to the buyer, the convergence of sales and marketing, and the impact of technology combine to make effective marketing both more possible and more difficult than ever. I'll cover these challenges in greater depth in Chapter 1, but here's a taste. Technology has made it possible to target marketing messages to specific audiences and to measure the effectiveness of that marketing message within days or weeks. It has also deluged audiences with a flood of marketing messages, most of which they ignore. This requires a new approach to marketing—one that is iterative and that measures effectiveness, not in status reports or weekly meetings, but in data visible to all. This new approach also requires new skills and greater responsibilities.

Do you long for rapid, iterative marketing that measures success based on business-focused analytics? Are you overwhelmed or frustrated by the ever-increasing demands being put on marketing, without matching increases in staff or budgets? I wrote this book for you.

Software developers faced a similar crisis at the turn of the millennium. Software was often delivered late. It frequently failed to meet the needs of the customer. Managers failed to make hard tradeoffs, those necessary to deliver quality software on a reasonable schedule. When software projects did work, it was only by dint of long hours and heroic efforts on the part of the developers. When demands became more complex,

the then-current methodology, known as Waterfall, failed. Basic business requirements—quick turn, continuous deployment, and responsiveness to fast-changing user needs—went unmet.

Adapting Agile to Marketing

In February 2001, a group of software developers met at a ski resort in Utah. At the end of the meeting, they issued the Agile Manifesto, whose four values and 12 principles revolutionized software development. Today, Agile is the dominant methodology for planning, organizing, and managing the day-to-day execution of software development. Application of the Agile Manifesto's values, principles, and processes has raised not only software quality but also the productivity and job satisfaction of software developers.

Agile values, principles, and processes can also revolutionize how we practice marketing. We can realize commensurate benefits in productivity, quality, and job satisfaction. And, although we can't simply apply them as-is, we can take the values, principles, and processes developed by and for software developers and adapt them to meet the needs of modern marketing.

Many marketers today want to be Agile. The word itself is attractive—who wouldn't want to be agile? At the same time, they don't fully know what it means, and they don't know how to implement Agile methods and practices in their organizations. They may have taken Scrum master training designed for software developers; and while they're excited about the possibilities, they don't know how to apply Scrum or Kanban to marketing.

I've spent a decade figuring out how to adapt Agile to marketing. I've blogged about it, I've practiced it, and I've trained and coached many organizations through its adoption. I've learned—by making mistakes and realizing successes—what works and what doesn't. This book makes available to you what those years of learning have taught me.

The Six Disciplines and Four Shifts of Agile Marketing

To apply Agile to marketing, teams must master Six Disciplines and organizations must make Four Shifts in beliefs and behaviors (see Figure P.1). The Six Disciplines can be adopted at the grass roots and spread up and

Figure P.1   The Six Disciplines and the Four Shifts of Agile marketing

out through the organization. The Four Shifts are different: They require changes to the culture of the organization, including parts of the organization outside of marketing. Marketing can often lead these shifts, and marketing is critical to their adoption in any organization.

The Six Disciplines vary in the degree of commonality they have with the corresponding disciplines practiced by software developers. The disciplines of structure and process management resemble disciplines mastered by developers as they apply Agile to software development. I summarize in this book some of the techniques and processes developed by software engineers and then discuss, in detail, the differences—subtle and profound—that we discover when we apply Agile to marketing.

Other disciplines, like alignment, validated learning, and adapting to change, create unique challenges for marketing. For these, I provide guidance on mastering them. The sixth discipline, creating remarkable customer experiences, requires that marketers collaborate with other areas of the organization, including software development, to create remarkable customer experiences. I provide guidance on how to begin mastering business agility

and how to work effectively with others in the organization to master this discipline.

My goal is to help organizations and Agile practitioners adapt Agile principles to both the marketing function and to marketing-led businesses so that they can get more done, achieve better outcomes, adapt to change, and provide remarkable customer experiences.

Who Should Read This Book?

I wrote this book for marketers and marketing managers who want to apply Agile values, principles, and processes to the marketing function in their organizations. It is a *practitioner's* guide to Agile marketing, not a strategist's guide. While I spend some time answering the basic questions—What is Agile marketing? Why would you want to implement it?—I spend much more time focusing on the details of adapting Agile to marketing and practicing Agile in the marketing organization.

Senior leaders, including chief marketing officers, or CMOs, will find the concept of the Four Shifts helpful in implementing Agile in their organizations. Senior leaders who want their organizations to be Agile must guide the organization, and particularly the middle-management layer, to the changes in beliefs and behaviors necessary to realize the full promise of Agile. If they don't lead these shifts in beliefs and behaviors, both by example and by getting behind their adoption, Agile can have only limited effectiveness in their organizations.

Senior leaders play a primary role in leading the Four Shifts; they also have a role to play in mastering the Six Disciplines. CMOs and the most senior marketing leaders must support and involve themselves to an appropriate level in the disciplines of alignment, structure, adapting to change, and creating remarkable customer experiences. Working out whether the team adopts Scrum, Kanban, or something in between is less relevant to senior leaders; that is best left to the teams. The same goes for validated learning; the details are best left to the teams.

Organizations that succeed in adopting Agile and transforming their marketing tend to do the following:

- *Invest in training and coaching.* Thinking that simply attending a two-day training course will transform the organization is unrealistic. Organizations that succeed know that transformation requires time and follow-on coaching from experienced practitioners.

- *Persist*. They realize that major change takes time, and they do not stop for setbacks. They persist until they achieve results.
- *Experiment and embrace new approaches*. They are willing to change their existing ways of working and the way that teams are organized.

If you make the necessary investments, if you persist, and if you experiment and try new approaches, you can succeed in your adoption of Agile to marketing.

How to Use This Book

You can, of course, read this book straight through. It is organized into four sections: an overview, a section on the Six Disciplines, a third section on the Four Shifts, and a final section on how to succeed with Agile marketing.

If you're in a hurry to get started, you can take a different approach: I'd recommend reading the overview in Part 1, then Chapters 3 through 11 of Part 2, which cover the first four disciplines. You may also want to read Chapter 20 on getting started with Agile marketing. Once you have been practicing Agile marketing for three to six months, you can come back and read the remaining chapters. You will have more context in which to learn the final two disciplines and the Four Shifts.

If you're a senior marketing executive and you're more interested in the strategic and the change management issues of introducing Agile marketing in to your organization, I recommend reading the overview in Part 1, Chapter 3, as an introduction to the Six Disciplines, and then all of Part 3 on the Four Shifts. You may also want to check out Chapter 22 on the role of the Agile leader.

Benefits of Adopting Agile in Marketing

You who want to adopt Agile marketing have set a challenge for yourselves. If you're not management, you need to convince management. If you are management, you need to convince the individual contributors—they must buy in to new skill sets, beliefs, and behaviors.

Sounds like work; why bother?

- *Improved productivity*. This is the first reason marketers give when asked why they've adopted Agile marketing. The manner, however, with which marketers improve productivity is unexpected. It's not through

working harder and getting more done in a typical eight–hour day. How do marketers improve productivity?

- They focus on what's most important to the customer and what's best aligned with the desired business outcomes.
- Unproductive work is eliminated.
- Long report–out meetings are replaced with short daily standups.
- They get agreement on the indicators of success and how to measure them.
- Their marketing is validated through experiments and testing.

- *Greater awareness of marketing's contribution.* "What is it that marketing does, anyway?" Every marketer has heard that question. When marketing is done well, its contribution is often overlooked. When marketing fails, everyone knows, and is quick to blame marketing. Because of Agile's inherent coordination with the business units and use of cross-functional teams, and because of the use of Scrum practices like Sprint reviews, the organization learns more about the contributions and the value of marketing. This raises the level of respect for marketing in the organization and makes it easier for marketing to get the resources needed to properly do its job.
- *Adaptability to change.* Marketers must adapt to and embrace change. While this isn't new, it's increasingly critical as the pace of change accelerates. Agile provides in–built adaptive mechanisms like emphasis on iteration, focus on customers, and the spontaneous emergence of requirements through experience rather than through fixed, up–front planning. And on top of the value of these in–built mechanisms, Agile marketers get to master the discipline of adapting to change, which leads directly to tremendous benefits to marketing and to the enterprise. This can be particularly advantageous for those organizations that include marketing in the creation of the customer experience. Marketing organizations that master this discipline sense changes in customer needs and help their organizations adapt quickly to these changes. Because they have tools and processes to adapt to change, Agile marketers embrace change.
- *Improved job satisfaction.* Both anecdotal evidence and rigorous scientific studies show that software developers in organizations that practice Agile have better job satisfaction than software developers in organizations that use more traditional development methodologies. Surveys also suggest that the same is true for Agile marketing teams. In the *3rd Annual State of Agile Marketing Report,* 74 percent of Agile marketers

were satisfied with how their team was working and the results they achieved, compared to just 58 percent of traditional marketers and 34 percent of ad-hoc marketers.[1]

- *Attracting and retaining talent.* This is related to improved job satisfaction, of course. Top marketing talent can be difficult to find. Organizations that practice Agile are more likely to attract and retain this talent. Practicing Agile marketing also develops talent. It encourages marketers to get closer to customers, to align with business units and meet their needs, and to learn how to get their job done more effectively.

As valuable as you'll find this book, reading is no substitute for doing. You'll learn more by applying what you learn to your own situation than by careful study of the book without hands-on experience. Steven Blank, one of the foremost experts on successful startup practices, gives the following advice to startups, which applies equally to marketing, "Rule No. 1: There are no facts inside your building, so get outside."[2] Learn by doing, by experimenting, by trying things out. *See* what works, and what doesn't, for you and your organization.

Let's get started!

Part I

Overview

Chapter 1 begins by outlining many of the challenges that face marketers today. It answers the question "Why should I change?" Change is hard, and most people are reluctant to change just for change's sake. Perhaps you feel that your existing marketing is pretty good or even great, and that may well be the case. However, most non-Agile organizations that produce good marketing do so through hero mode—talented people working long hours—and when good people leave or burn out, the quality of marketing suffers.

Chapter 2 defines the values and principles of Agile marketing. The values I outline differ slightly from those expressed in the Agile Marketing Manifesto. Those of us who attended Sprint Zero, where the Agile Marketing Manifesto was written, acknowledged that we produced only a first draft. I've taken the liberty of revising that draft, and I've been teaching the six values to organizations throughout the world for many years.

These values and principles are the core of Agile marketing. Before embarking on an adoption of Agile marketing, it is critical that marketers understand and embrace these values and principles.
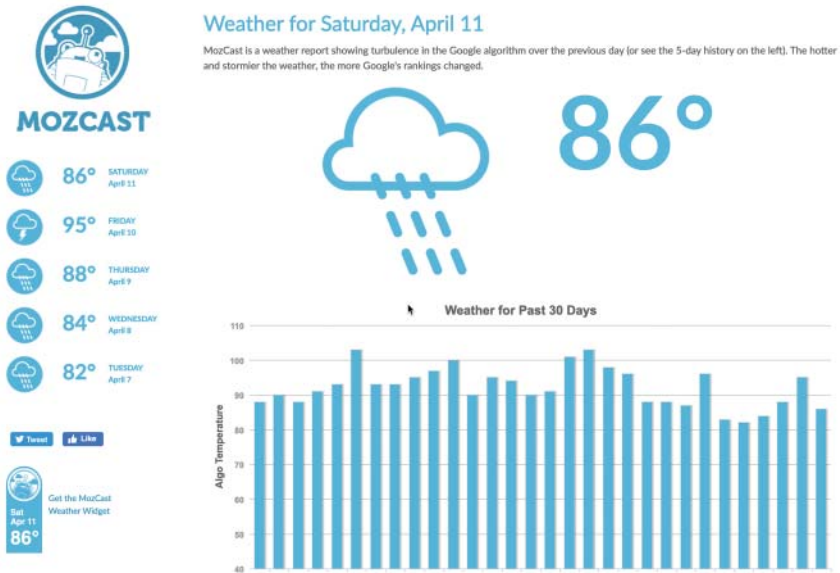
Chapter 1

Challenges Facing Marketers Today

You should never view your challenges as a disadvantage. Instead, it's important for you to understand that your experience facing and overcoming adversity is actually one of your biggest advantages.
                    —*Michelle Obama, former First Lady of the United States*

I t took 110 years for the telephone to be adopted by 1 billion users. It took 49 years for television to be adopted by 1 billion users, 22 years for mobile devices, 14 years for the Internet, and 8 years for Facebook. It took one year for the Internet of Things (IOT) to reach 1 billion devices.[1]

These new technologies and the accelerating rate of technological change present new opportunities to reach customers. Marketing must adapt.

According to the folks at Moz, an inbound marketing and search engine optimization firm,[2] Google releases between 5 and 35 major changes, and

Figure 1.1   Moz's MozCast tool, image courtesy of Moz, Inc.
Source: Moz, Inc.

hundreds of minor ones, to its search algorithm each year. Its MozCast tool, shown in Figure 1.1, shows the turbulence in Google's ranking algorithm over time.

Google's own data (which Google stopped sharing in 2018) indicate that Google makes, in fact, more than 5,000 changes, major and minor, every year. That's 14 changes per day. No marketing plan can keep up with that pace of change.

In 2017 and 2018, marketers sprinkled artificial intelligence (AI) into their marketing copy, almost like fairy dust, and sometimes with nothing but dust behind the words. AI live chat, using tools like Intercom and Drift, was in every marketer's toolbox. Podcasts surged. Voice search, on Alexa and its competitors, became a way for consumers to find products and services, and hence became something else that marketing needed to address.

In 2019, marketers advertised on smart speakers like Amazon Echo or Google Home. Tools like YotPo and BazaarVoice helped marketers collect reviews and ratings for e-commerce sites and create referral programs. 360-degree videos offered more opportunities for interactivity and engagement.

How, in 2020, will marketers adapt to new uses of artificial intelligence? How will marketers adapt to newer social-media channels like TikTok, Caffeine.TV, Lasso, Vero, Kik, and Houseparty? And the largest question of 2020: How will marketers respond to the impact of the Covid-19 pandemic and the changes to our lives as we respond to that crisis?

If you wrote a marketing plan at the beginning of any of these years, you could not have anticipated the impact of new channels and new technologies, and in 2020, the impact of Covid-19. The requirements put on marketing, constantly changing, emerged at their own pace.

The "write a plan, work the plan, declare victory" method of operations is dead! Modern marketing must keep up with the pace of change and learn to address emergent requirements as they happen.

The Shift to Digital

Digital advertising and digital channels present new challenges and new opportunities to modern marketers. As Scott Brinker discusses in his book *Hacking Marketing*, digital channels have new dynamics:

- *Speed*. Digital campaigns can be rolled out, changed, and adapted at a speed unimaginable to marketers in channels like television or print. Marketers with the right scale of user interaction can modify campaigns in minutes or hours; almost anyone can achieve a rhythm of weekly change and experimentation. This presents a tremendous opportunity and a challenge. How do we build and manage the marketing processes to take advantage of this speed? How do we organize our teams to move at this speed? What tools do we use?
- *Adaptability*. If a digital campaign works in one channel (display advertising, say), it's not that difficult to adapt the campaign to work in another channel (Facebook). Compare this to adapting a television campaign to print. Opportunity and challenge: When a prospect sees a message in multiple digital channels, how do we measure the impact of spending in each channel? With each channel having its own ways of grouping audiences, how do we think about audiences holistically, across channels?
- *Adjacency*. In the physical world, where competitors rarely share a parking lot, consumers tend to value convenience over price. Few drive across town to save a few pennies. On the Internet, your competition is one click away. Opportunity and challenge: It's easier than ever to compete, and, if you're the incumbent, you compete on more than price or you risk the consumer clicking away.

- *Scale*. If a campaign works for 10,000 digital prospects, then in most channels, given sufficient budget, campaigns can be scaled up overnight for millions of users. But scaling digital campaigns comes with hidden challenges. Often, when we begin a campaign, we focus our message on the most receptive audience possible. Sometimes, we get a very good conversion rate and then, when we scale up the campaign to a more diluted, more representative audience (in terms of receptivity to our product or message), we fail to duplicate that conversion rate. And we often don't know when to scale—do we continue to refine and improve our message with small groups before we scale up? Do we scale up quickly to deliver revenue as quickly as possible?
- *Precision*. Digital campaigns can be measured with a precision unheard of in analog media. Challenge: Do we teach everyone to understand statistical significance and how to report on and understand the data? Do we leave that function to intermediary experts? What do we measure? How do we avoid the vanity metrics described by Eric Ries in his book *The Lean Startup*? (Vanity metrics feel good but do little to forward our business goals.)

The shift to digital, on balance, provides tremendous opportunities for the modern marketer, while presenting new challenges and requiring us to find new ways of operating.

The Impact of Technology

Technology changes how buyers shop, creates new and fragmented channels of communication, transforms how marketers manage marketing, and expands the information that marketers can access to personalize and direct marketing messages.

Technology—the Internet—provides more product information than what organizations typically provide. It changes how buyers access that information.

Increasingly, buyers access information through their phones. Since 2017, about half of Internet usage has been through mobile devices.[3] Marketers must therefore think mobile first. And the desktop still commands such a sizable minority of Internet use that marketers must create multiplatform experiences.

Technology, by providing new tools to meet the needs of marketers, transforms how marketers manage marketing. Every year, Scott Brinker publishes the Marketing Technology Landscape Supergraphic, shown in Figure 1.2. In 2011, its first year of publication, it listed approximately 150