

**Matthew:** Hello. Welcome to Marketing Smarts, a podcast brought to you by MarketingProfs. I'm your host Matthew Grant, Managing Editor here at MarketingProfs. Thank you for listening.

Today we're talking about agile marketing. "What's that?" you say. Well, it's an attempt to apply the principles and practices of agile software development to the world of marketing. "Why would anyone want to do that?" you ask. Well, as it turns out, marketers are under a lot of pressure.

With the economy still limping along and the demand for goods and service anemic, marketers are being asked to do more and more with less and less. Add to the mix the always on real time aspect of business in a world driven by perpetually buzzing social media and ubiquitous smart phones and you find that marketers are also expected to be hyper-flexible and super responsive.

In order to meet these challenges some have realized that you need a new approach. It's no longer about the 200 page marketing plan and its lock-step execution. Instead it's about the four week sprint with measurable results, fast iterations and continual improvement.

To talk about how this plays out in the real world we have with us today Frank Days. A veteran marketer and agile marketing practitioner, Frank has the Agile Marketing blog, which you can find at [AgileMarketingBlog.com](http://AgileMarketingBlog.com), and co-hosts with John Cass of the Marketing Agility Podcast.

Welcome to Marketing Smarts, Frank.

**Frank:** It's great to be here, Matt.

**Matthew:** Thanks for joining us today, this beautiful Fall day. It finally feels like Fall, like Summer has finally fled. I heard even up in New Hampshire they're having frost warnings.

**Frank:** I heard that here in New England they're talking about them as well for this weekend.

**Matthew:** Thank God, because these mosquitoes the last few days have just been killing me. I want them to be dead by the frost.

So let's jump into this then. Why are people talking about taking an agile approach to marketing in the first place?

**Frank:** I think it comes to a number of set of circumstances. First and foremost, I think we all read these days about the increasing velocity of just everything in life – and that includes marketing. With the proliferation of all these social channels, everyone is on Twitter. I was at a Forrester luncheon yesterday and I think they were saying among the enterprise customers that

they had surveyed, something over 70% were on Twitter and I think over 80% were on Facebook.

Everyone is social, everyone is chatting, everyone is involved in these social channels, everyone is keenly aware of what's going on around the web and increasing velocity of conversations, what David Meerman Scott would call real time marketing, force us as marketers to be much more responsive to things.

As a result, things like marketing plans and other budgets and things like that become less and less relevant and people are looking for more effective ways to manage these faster and more agile, I guess, marketing processes.

**Matthew:** You mean so the sort of old fashioned way of planning out your whole marketing year in a sense with a marketing plan and budgets and how everything is going to happen, you can't be nimble enough in that sort of set up?

**Frank:** I think there's kind of two sets of marketing activities you have today. There are some things that are inherently waterfall, as the contrast to agile, that you have to plan for. Whether you're going to a tradeshow or trying to put an insertion order inside a magazine or even buying media these days on major websites, that requires some degree of planning.

But, a lot of what we're doing, an increasing amount of what we're doing as marketers is non-linear. You can't put it on a work schedule, you can't predict how things are going to actually occur. You need to be more adaptive. To borrow another term Forrester uses, be more adaptive and responsive to what's going on.

**Matthew:** So what's an example of a nonlinear marketing activity that you think sort of calls for a more agile approach?

**Frank:** Sure. I think a lot of interactive programs, a lot of social media programs for example. Say you're doing something in the content marketing realm.

You can't always predict how someone is going to respond and the comments you're going to get in response to a blog post you write. You can't always predict how many times it's going to get retweeted and who is going to retweet it. You can't always predict how many leads you're going to get off that individual program.

But, when you're doing that program you may in fact want to be able to look at the results and maybe one post which is more successful gets you thinking about new posts you can do on that topic or something related to it.

I think of an anecdote we did on a portal that I did at Novell last Spring, Log Management Central, where we were riffing on the Charlie Sheen “tiger blood” kind of things that were going on at the time. That sounds really dated now six months later, but back last Spring the man was on fire. That kind of sometimes shameless blogging can drive traffic.

Being available, open and ready to be responsive to that is pretty important. If we had written a marketing plan that said “Gee, we’re going to write the marketing plan and three months from now we’re going to…” I can’t predict three months to the future what trending topic I’m going to be responding to.

**Matthew:** Right.

**Frank:** So the ability to listen, learn, and adjust, is pretty crucial.

**Matthew:** Right. That’s what even built into the phrase *agility*, it suggests that kind of flexible adaptive responsiveness that you’re talking about. But, just so we’re not losing listeners right up front, I think maybe if anyone is aware of agile software development they may have a notion of what this means. But, Frank, could you define for us what you mean when you talk about agile marketing or an agile approach to marketing?

**Frank:** Sure. The people that I’ve talked to who are practitioners and there aren’t a lot of people practicing it today that are taking the basic principles of agile project management and adapting them in marketing.

Some of those things include working and planning in really small bursts of time, otherwise known as sprints. Those typically vary anywhere from a week to about a month. Then within each sprint you have a core theme of what you’re trying to achieve.

And then you meet on a regular basis. Those are meetings which are often short stand up meetings, either daily or every other day meeting for 10, 15, 20 minutes to discuss things that you’ve recently achieved, things that you’re hoping to achieve in the next day or two, and then any roadblocks that you have.

Then working off of something that’s either – in typical agile software development environments there might be a wall with post it notes that people are familiar with, but I’ve often used a spreadsheet to replicate what’s known as a scrum board or a place where people will put the tasks that they use to manage.

The basic idea is that you are meeting frequently and rather than spending a lot of time talking about things you did two or three or four or five weeks ago, which is ancient history and not very relevant, or things you’re going to do three, four, five months from now, which is so far in the future that it’s not that relevant to today, you’re focusing on the things that are important

now. So you've got people aligned, communicating and focused on the things that are important today so you can be increasingly responsive.

**Matthew:** Right. Is there an ideal size for the team that would be involved in this? You can't really do it across your whole department, right? It has to really be focused on projects.

**Frank:** Folks like HubSpot have a master marketing scrum, which they do I believe daily. I don't know the exact numbers on it, but I know it's a pretty large team because their marketing team is pretty significant.

I've done it with as many as six or eight people. I find that to be a pretty good number and kind of on the border of what gets to be difficult. My scrum here at **Coral Sense** is three of us and that's a good number. I think, Matt, you were on a team with me last year.

**Matthew:** Yes.

**Frank:** I think we had six people on it. That seems to be about right. Probably fewer than a dozen, but more than two. I think otherwise you can't really get the interactions and there's not as much benefit.

The constant assessment is really probably one of the other key points that goes on in these teams.

**Matthew:** What do you mean by that?

**Frank:** Well, constantly assessing priorities and making sure that people are focused on the most important things. And as new fires come up the constant assessment of if you have a fixed amount of work you know you can do this month and that happens after you do a few sprints or a few rounds of prioritizing, you get a sense of "Gee, in a given month we think we can get about 40 or 50 tasks done," using the average task as a size.

New task comes up, for example I'm personally having some website issues this morning that we need to look into. My web guy looks at it and says, "How does this fit relative to the other priorities I have on my list?" And you start to look and you say, "This is going to be more important than tasks X, Y, and Z." It might also imply that A, B, or C might not get done this month because we've moved these other tasks in front of it.

**Matthew:** Right. So is the team then, when you talk about agile and these kind of stand up meetings, it had a certain amount of informality to it, it almost sounds like it might be decentralized. Is it really clear what the different sort of project roles are and in fact who is the project leader when you're taking on an agile approach to a project?

**Frank:** In an agile environment there are often a couple of important roles. It starts with someone who is often referred to as the scrum master or the person who kind of runs that project. In marketing there's often campaign planners in old school marketing, they'd probably take that role. In today's agile role that person is the scrum master and that person kind of facilitates the process and makes sure that the meetings happen on time .

A key person who is involved in kind of breaking the tie and acting as the conscience of the group is the person referred to the product owner, or in this case we use the process owner or marketing owner. That person ultimately speaks for the market. In an agile product development environment that person might be a product manager who speaks for the customer, is the voice of the customer. So when you're trying to assess this feature or that feature, in this case of agile marketing, this program or that program, that market lead person will speak for the team.

And then beyond that are the people who do the work. The joke in agile land is that there are two types of people who participate in scrums, there are pigs and there are chickens. It kind of goes back to the old story about the pig and chicken meet to start a business and they say, "Great. How committed are you?" They're going to do ham and eggs for their breakfast and the pig says, "Great. But, I'm going to be a lot more committed to it than you are because I'm going to be the bacon and you're just going to give up some eggs."

Anyway, long story short, in any agile environment there are pigs and there are chickens. There are people who are more committed and there are people who are less committed. By the nature of scrum meetings there will be meetings and I've worked in environments where everyone comes to every meeting and some environments where half the team comes to every meeting and then people come and go. That's okay as long as everyone is participating in the prioritization and the major decisions are being made through that scrum meeting.

**Matthew:** Right. And whenever people are being asked to do whatever eggs or bacon, they're being asked to chip in, they're actually showing up with it.

**Frank:** Exactly. And the substantive decisions are being made through this process and the hard questions are being asked regularly. I think as an executive and a start up software company I've been known to meddle at times with priorities. It's a great environment for the team because the guys who I work with on my team constantly are calling me on, "Hey, so what's more important? You just asked me for four high priorities, you just asked me for five things. Realistically?"

My internet marketing manager is a great guy because he is pretty experienced and he'll often ask that question, "Of these five things that we now have on our active tab of our plan, give me a rank from one to five so I can know which ones to work on." Those are the good hard

questions that we ask and we scrum every other day, so three times a week we ask those hard prioritization questions.

The amazing thing is that say we want to, I don't know, my CTO says "Hey, let's add our customer list to our homepage of our website," that gets put onto our sprint plan and then we prioritize it and it gets done in like two days instead of two months or forgotten about.

**Matthew:** Based on whether or not it deserves the priority that you're trying to give it.

**Frank:** Correct. And we're constantly asking those questions. Rather than asking and having a weekly catch up between team members and I meet with each person individually as the manager once a week, which I still do – we don't use those as planning meetings, we use those more as kind of vision and strategy meeting. The tactical stuff is done as a group and that keeps us all aligned so you don't have to spend time on ...

I've worked in companies where they've had these meetings called interlock meetings and we've had meetings where people will try to create alignment. Well, alignment in large companies can be very challenging. A process like agility, alignment is built right in, the communication is built right in. There's no need for 500 cell spreadsheets and there's no need for catch up meetings, cadence meetings as they would often refer to them. You have a process where cadence and alignment are built right in, pretty big benefits.

**Matthew:** Right. Because the sprint itself and the plan sets the cadence and then you're constantly checking in with these regular scrums.

**Frank:** The beautiful thing is that if someone wants to know what's going on at any instance in time, you can look at that spread and you know that within about 24 to 48 hours of certainty you know whether a task is being worked on or not. And then if it's not on this 30 day window of activity you have a sense of why or where it fits in the overall scheme of things.

**Matthew:** So when did you first start or what was the first project where you tried to apply these agile principles? What were you trying to accomplish and what happened?

**Frank:** The first time it dawned on me that I was practicing something related to agile was about five years ago when I was working for a software company and we would actually go through these bursts, the company was growing about 40% a year and we would go through these bursts of activity trying to recruit people, because we were just growing so fast and we would get behind on things.

So my CEO would grab everyone, we'd have like 10 open positions, and he'd say, "Listen, we're going to meet every day at 8:00 to discuss what's going on and we're going to prioritize. We're

going to keep a list and I'm just going to hold your feet to the fire." And unintentionally we were doing agile. He was a former sales manager, he had no idea what he was doing.

But, then it dawned on me in marketing when we get into a rush around something, that's the way that we tend to behave as well. If we're trying to scramble to get a webinar together, we're trying to scramble to get to a tradeshow, we're trying to scramble to get a direct mail piece out, the default activity is you grab everyone every day and you hold everyone accountable and you just go. I thought to myself, "Why don't we just manage our team that way, period?"

So later on we started to tinker with the idea and we just tried it, we started doing it. Our development team had started using it and then all of a sudden you start to realize it's a much more effective way of managing. It also just the ongoing prioritization and discussion not top down, but in some ways bottom up. The team looks at the priorities.

Again, I've been known to meddle so I'll freely admit that, sometimes on the tie breaker. But, if once a month we have a philosophical discussion about what our vision is for the month, so if the theme is demand generation this month, that can be used against me at opportune times when I'm trying to meddle, but the truth of the matter is at least team members feel like – they don't sit and grouse amongst themselves, they come and they grouse in the meeting.

The communications are open and at the end of the day we get better decision making because those conversations happen. We have really open lines of communication and we're talking pretty regularly. It's a bit of a forcing function, but it can be quite effective.

**Matthew:** Right. That's what I always thought was at least one appeal of the agile method was this quasi-egalitarianism, but it's also a sense of there are people at different points in the process who have greater insight into what the pressures are, what the dependencies are, and you need to hear from them rather than have someone just like cracking the whip and trying to push people off the plan.

**Frank:** Totally. This is a really unintentional thing that I've learned in practicing agile. I did a micro site project and sometimes people have skills that you don't know about, latent skills that when you're in a linear process where you have a big spreadsheet and you meet once a week and you assign the web tasks to the web guy and the field marketing stuff to the field guy and the PR to the PR person, that if you're in a scrum and you're meeting pretty regularly and the web guy is loaded down you learn things like if your field marketing guy is quite good on the web and has some HTML skills that you didn't even know about and he picks up some of your HTML skills.

There's some very interesting learning that goes on in this process and you get out of this really linear view of the world that everything is siloed, everything is a process, and you get into a

world that sometimes is messy, sometimes is uncertain, but in general you get a lot more done. That's been my experience.

**Matthew:** Right. Even the uncertainty, it seems like you start to get that under control by creating much more smaller windows in which to be uncertain in which you have more control over making sure what's going to happen or finding out more quickly what has actually happened.

**Frank:** The truth of the matter is that marketing plans and marketing budgets, especially in fast growing companies like where I am, they're just not accurate for more than two or three months. So you could spend your time building this really beautiful perfect marketing plan –

I joked, I took over for a guy five years ago who I took over and I was cleaning out the desk and I found this 55 page PR plan. I thought "the charred remains of my predecessor." And it was kind of symbolic for the reason why he didn't last. I've always been pretty effective in my career at getting a lot of stuff done very quickly, but it's not always a lot of stuff, it's the right stuff.

So by prioritizing regularly, scrumming, the things that come up, my boss (the CEO) comes to me and has a question about a particular thing that he's looking to get done, I can ask him a question of how important it is and he says, "Listen, we really need to get it done." I get it into the scrum and we move it to the top of the list and it gets done in less than 48 hours, rather than it getting stuck on a massive list that we review once a week and maybe it goes through two one week cycles before it gets done.

So the responsiveness is crucial all around.

**Matthew:** There's been a lot of emphasis in what you've said on getting things done, getting the right things done, getting them done quickly. Is there a connection, in your experience, between this kind of rapidity or velocity of accomplishment and pushing projects through and the results you're able to get? Is there something, do you lose anything with the speed, do you gain something? And if you have an illustration that would be great.

**Frank:** It's an interesting question. I did a talk at a university here in Boston last Spring and that was one of the questions that the student had asked me. It was an undergrad and she had said, "Well, don't you get lesser quality results by being agile?"

One of the principles behind what we do is to try and make sure when we're doing stuff we're looking at the data and we're looking at the data in as close to real time as possible. So agile is particularly well adapted for interactive projects where you have your Google Analytics data, you have how many leads we got yesterday sitting in sales force. You have all that data at your

fingertips, so you could be looking at, in the case of doing the anecdotal blog “we did a blog about Topic X and for the last two days it had 500 views versus the stuff we did last week all had 100 views each. Let’s look at what we did for the topic that got us 500 views and let’s start to riff off of that.” Rather than, again, reviewing our results once a month or once a week in a big conference call with a whole bunch of people where you can’t really be responsive enough.

**Matthew:** So we talked about where you started, what one of your first agile projects were and how you kind of stumbled into it. So far in your experience of using this approach, do you have a particular project that’s your favorite or that’s not the jewel in your crown exactly, but one that you think really illustrates the power both in terms of efficiencies, but also in terms of results of taking this approach?

**Frank:** Sure. I think the project I mentioned a little bit earlier, the LogManagementCentral.com project we did at Novell where we took that project from zero to page one on Google for our most important keyword in 90 days. We launched the website in less than a month and it was a blog, so we launched in more like 10 or 11 days. Using our traditional approaches if we had spun it up on one of our inside hosted things, used our traditional design, filled out a design template and got through the whole overall process, we probably would have had the site live in about 90 days.

That was a great team because we had built a really nice cross functional team of people and built all the right relationships. We scrummed every other day and it ended up being both fun and productive, which I think is pretty cool to do in a project. We got to our results to the point now where it’s six months after that site’s launched, well more like eight months now, and they’ve picked up number one now on Google for “log management,” which is a really valuable term at \$22 or \$20 per click on Google, so a fairly competitive term.

So we used it to keep ourselves laser focused on it and we tried a lot of different things and we moved fast and we broke through a lot of the traditional processes, but it helped us get to our results, in my mind, a lot more quickly.

**Matthew:** Are there any organizational challenges? I guess what I’m thinking is could you take this agile approach in any company or does the organization have to be set up in a way that it’s sort of agile friendly? So, what are the organizational challenges that someone might encounter if they’re trying to adopt and implement this approach?

**Frank:** It’s certainly a recurring theme we hear on our podcast, around people and culture. That stuff is always difficult in any place you work at. The bias I’m hearing for agile marketers is smaller companies, more technology oriented companies, and companies that often are practicing agile in their development team. So the person who is the champion of it

might be someone who comes from a software development or technology background, so they learned about agile that way.

Bigger companies and bigger projects are bigger challenges. There's more risk. When I was at Novell I spent a year and a half trying to evangelize it and I was trying to talk one of our solution marketing managers into using it for the roll out of a 3.0 or 4.0 version of his product that was coming out. That was a herculean effort and something that, in retrospect, was just way too ambitious. So we ended up picking a smaller project, a micro site, flew under the radar, didn't really need to worry about the corporate t-cells trying to push us off that process.

I was lucky, I recruited the right team and the right people and built the right alliances, had an excellent executive sponsor and we were able to stay protected and isolated from a lot of the really entrenched processes that were in place. We were lucky. If you pick the right project you can demonstrate some success.

**Matthew:** And then once you demonstrated success did that actually help increase the interest in this approach within this organization?

**Frank:** It did for follow on projects. We were able to sell the idea of using it elsewhere based on the idea of using it there.

Here in my current job we've been using agile. I run marketing so it was easy for me to bring it into my small team. My boss isn't quite aware that we're doing it. He's a technologist by trade, so he understands what agile is, but to him the results are more important and he understands that we're getting there and we're getting a lot of stuff done.

In some ways it's more of the results that matter and the process is how you get the results. It does as a manager, but as an executive like my boss, he cares about us getting stuff done and getting the right stuff done and getting it done quickly and helping us meet our results, because his investors also are very much interested in seeing the company grow relatively quickly, so anything that can accelerate the process is greatly appreciated.

**Matthew:** Right. But, in your experience and the way things seem to be working, actually achieving the results quickly is one of the outcomes and the desired outcome.

**Frank:** Right. Being adaptive is crucial, particularly in a start up environment where I am. We're constantly making decisions about how we're going to price and position, and our competition is moving very quickly to respond to the threats that we pose to them. I don't have the luxury of writing a six month marketing plan and hoping that it's going to stay accurate through that whole entire six month period.

**Matthew:** Right. If someone wanted to start trying to apply these principles, I guess there's two questions. The first one would be what are the first steps that someone should be taking? Say they've listened to this podcast and they're like, "This sounds great. I want to get fast results, I want to get the better results, I want to get the right results, I want to be adaptive, I want to be agile." What are the first two or three steps they need to take to kind of make this happen within the realm of their control?

**Frank:** Sure. I think it's maybe a people, products, process kind of question. From a product standpoint I would suggest trying to make sure you pick a project that is big enough to be meaningful, but small enough that it's going to fly under the radar. You don't want to use it on your mission critical life or death project if you're never done it before, because there's just a whole lot of risk. Pick a project that's big enough where you can have some demonstrable benefits, but not so big that if it fails you've doomed yourself forever in your career.

Second thing is pick the right people. I think you need to find a product – either a product owner, product champion, market champion who can play the voice of the customer and really understands the market and what you're trying to achieve, who owns the process and is really well invested and really bought into the idea and enthusiastic about it.

Also, along with it I'd say try to make sure you have some kind of executive sponsor. That was a key component for us at Novell was to have a really strong executive sponsor in Justin Steinman who really helped us out and ran cover for us a lot of times when people would be asking questions about why we were doing what we were doing.

Then keep the process relatively simple. If you're not sure, there's a whole lot of resources out there from a process standpoint around agile software development. The adoption in the software space is probably greater than 50% and it's just really well known and a really mature category. Read the Agile Manifesto to get yourself motivated and give it a try. Keep it simple, keep your sprints short. If you're pretty worried about it, keep it to like two weeks, don't try and scrum every day. Keep it simple.

Software developers tend to be fairly dogmatic in what they do. They use things like burn down charts to measure progress. Most of the agile marketers that I talk to, it's kind of funny to think, but it's relatively loose and relatively flexible. The benefits of no marketing plan, short bursts of work and meeting frequently are so large that they don't get obsessed about every subtle difference in sizing in each task and making sure they're aligned.

**Matthew:** Right. I know they're agile institutes and things like that and I can imagine in the software development space there are dogmatic zealots around exactly how agile is supposed to happen.

**Frank:** Very much so. If you're in a real purist environment in agile you'll find that. Maybe that's because engineers are more methodical and more mechanical about things, not that marketers can't be that way.

**Matthew:** All right, we're at the end of our time here. Frank, first of all, thanks a lot for discussing all this, giving this overview, giving clear examples. If our listeners wanted to follow up, where can they find you and your other thoughts around agile marketing?

**Frank:** A couple of places. Marketing Agility Podcast on iTunes and I've got a blog that we've been using as the home for the podcast on **AgileMarketingBlog.com**. There's some Power Points and some other content up there. Obviously you can find me on Twitter as the infamous **@TangySlice**.

**Matthew:** One of the Slice Girls?

**Frank:** My career as a rapper never matured quite as well as my career as a marketing manager, so right now I'm going to have to stay with the Frank the Marketer over at Tangy Slice.

**Matthew:** Thanks so much, Frank, for taking the time to talk to us today. Thank you listeners for tuning in to Marketing Smarts. See you next week.