

# Agility in Marketing Learning Outcomes



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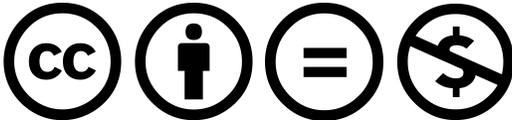
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# **SPECIAL THANKS**

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# CONTENTS

**2 LICENSING INFORMATION**

**3 SPECIAL THANKS**

**4 TABLE OF CONTENTS**

**5 HOW TO READ THIS DOCUMENT**

**6 LEARNING OUTCOMES**

**6 1. WHY AGILE MARKETING**

6 1.1. Critical Paradigm Shifts for Marketing

7 1.2. Customer Analysis and Segmentation for Business Agility

**7 2. IMPLEMENTING AGILE MARKETING**

7 2.1. Adaptive Planning in the Marketing Context

8 2.2. Teams and Teamwork in the New Paradigm

**9 3. SUCCEEDING WITH AGILE MARKETING**

9 3.1. Establishing Short Work Cycles in Agile Marketing

10 3.2. Experimenting, Learning and Pivoting

10 3.3. Making it Real: Agile Marketing in Practice

# HOW TO READ THIS DOCUMENT

This document outlines the Learning Outcomes that must be addressed by accredited training organizations intending to offer ICAgile's Agility in Marketing certification.

Each LO follows a particular pattern, described below.

## 0.0.0. Learning Outcome Name

*Additional Context, describing why this Learning Outcome is important or what it is intended to impart.*

The Learning Outcome purpose, further describing what is expected to be imparted on the learner (e.g. a key point, framework, model, approach, technique, or skill).

# LEARNING OUTCOMES

## 1. WHY AGILE MARKETING

### 1.1. CRITICAL PARADIGM SHIFTS FOR MARKETING

#### 1.1.1. Agile Marketing Drivers and Criticality

*Modern marketers are buffeted by fragmented channels, complex marketing technology, sophisticated audiences and volatile markets. In this demanding and uncertain new world traditional work management tends to break down. In response, Agile Marketing provides a framework for delivering high quality, audience-focused results at a faster pace and with less waste.*

Illustrate the key challenges that are driving modern marketers to explore marketing agility. Give participants the opportunity to relate to the challenges as well as their VUCA context so they understand the need and relevance of Agile Marketing.

#### 1.1.2. Marketing to Serve vs. Marketing to Sell

*In the era of Business Agility, marketing must strive to overcome skepticism and negativity resulting from bad experiences customers have had over the years. An important shift for trust building is to move away from selling at all costs and instead toward solving customers' problems by serving their stated and unstated needs.*

Marketing is about serving customers through identifying their expressed and hidden needs. The goal is to create engaged, delighted customers with a long-term relationship to the organization as opposed to selling a single product.

#### 1.1.3. Defining Agile Marketing

*To combat the danger of confusing agile practices (e.g., Scrum) for Agile, this section provides a strong foundation of the Agile mindset, values and principles. The Agile Marketing Manifesto and its predecessor, the Agile Manifesto, should act as guides to "being Agile" rather than just doing a few Agile practices.*

Explain the foundational values and principles of Agile Marketing; Convey how the values and principles address the context and drivers, and provide a basis for a strong operating system that is a better fit for modern marketing functions.

#### 1.1.4. Differentiating Agile Marketing

*Myths and confusion around Agile Marketing abound. It is distinct from Agile Development, Reactive Marketing, Unsustainable Marketing. It is important to bring alignment and clarity around Agile and the vital role it can play in the marketing function.*

Differentiate Agile Marketing from Agile Development and then from common misconceptions regarding approaches such as reactive marketing and unsustainable / ever-changing marketing.

## 1.2. CUSTOMER ANALYSIS AND SEGMENTATION FOR BUSINESS AGILITY

### 1.2.1. Customer Centricity Over Organizational Focus

*One of the most significant shifts as organizations transition to Business Agility is the need to be customer-centric. In the era of globalization and ubiquitous connectivity, customers have vastly more choices than they ever have. For marketing, this means ensuring we hear the dynamic voice of the customer and focus on putting the customers' needs first, ahead of our organization's goals and other pressures.*

Customer centricity is about listening to what customers are and are not saying, then marketing to them in ways that resonate. Achieving this requires direct customer interaction, an understanding of who our customers really are and an ability to identify their hidden needs. Organizations also need to shift from the perspective of "organization outward," to "customer inward" ("we have a product to sell" vs. "you have a need we can meet.") Of the many current references, Steve Denning's work on "The Copernican Revolution in Management" provides a good platform for discussion.

### 1.2.2. Understanding Customer Needs

*In order to attract and serve our customers, we must first uncover and empathize with their motivations, behaviors and needs. Keys to customer-centricity involve using analytics to navigate the oceans of data that exist, as well as tracing customer journeys and using other capabilities to deeply understand customers and uncover their desires and pain points.*

Show techniques for generating insights into customer needs and for segmenting customers. The insights should aim to identify anomalies, pain points, issues or opportunities in the decision journeys of key customer segments.

### 1.2.3. Attracting and Retaining Customers by Building Trust

*Many customer relationships have been damaged by marketing interactions that are perceived as manipulative or intent on selling at all costs. In order to build trust, marketing has to change this perception and "walk the talk" of trustworthy behavior and a commitment to building long-term customer relationships.*

With considerable access to customer information comes significant responsibility - marketers need to be ethical and trustworthy in their use of customer information and build trust through each interaction.

## 2. IMPLEMENTING AGILE MARKETING

### 2.1. ADAPTIVE PLANNING IN THE MARKETING CONTEXT

#### 2.1.1. Focusing on Outcomes Over Outputs

*There is a big difference between generating value and staying busy. Many previous approaches to marketing focused on raw numbers and other*

*"busyness" metrics. Today, marketing is not about "how many" but "how valuable." In order to shift this focus, teams and organizations should clearly define desired outcomes for marketing initiatives.*

Distinguish between value-add activities and those done out of habit or antiquated management approaches. Introduce ways to help teams identify, align on and radiate desired outcomes as a means of focusing effort. Also discuss the benefits of stopping work on something when it becomes clear that no further value can be achieved.

### 2.1.2. Achieving Outcomes Through Marketing Backlogs and Stories

*The words we use to describe work significantly impact the path to achieving desired outcomes. Agile marketers should learn to use customer-focused techniques such as user stories or similar artifacts to describe projects and campaigns. These techniques emphasize the overall purpose of marketing work without letting the detailed implementation tasks cloud larger outcomes.*

Describe how to create effective marketing backlogs by using user-centric techniques such as user stories. This should include a thorough discussion of the role of a marketing owner in the artifact creation process and the continuous prioritization and maintenance of the marketing backlog. The primary purpose is to ensure the creation of "working marketing deliverables" and complete increments as opposed to backlogs composed entirely of tasks. Also practice articulating value propositions in language that is meaningful to stakeholders and marketing partners.

### 2.1.3. Tools for Adaptive, Customer-Centric Marketing

*There are a variety of tools available to marketers, some of which are applicable in an agile environment and some of which are not. Selecting tools to suit your context is an important skill for Agile Marketing practitioners.*

Explain some of the tools (canvases, personas, story maps, etc.) which may be applicable in an Agile Marketing environment, and how they can be used.

## 2.2. TEAMS AND TEAMWORK IN THE NEW PARADIGM

### 2.2.1. Delivering Marketing Value Through Cross-Functional Teams

*One of the key aspects of Business Agility is moving away from silo-team structures toward cross-functional teams.*

Describe a variety of possible teamwork structures and discuss how they contribute toward or detract from Business Agility.

### 2.2.2. Continuous Collaboration and Alignment Around Customer Outcomes

*Team structure and composition are central to success with agility. With numerous options for designing agile teams, the overall goal is to create cross-functional, self-organizing, customer-focused units. These resulting teams can deliver valuable work with minimal external dependencies and increase agility through consistent connections with larger organizational objectives.*

Illustrate the characteristics of agile teams and how they differ from traditional marketing teams. Explore the impact that shared services teams can have on collaboration and consistent delivery. Consider and analyze the impact cross-functionality and collaboration could have on the customers' interactions with marketing. Introduce participants to examples of customer-focused teams, including those organized around KPIs, stages of the customer journey, ABX, sales enablement teams, etc.

### 2.2.3. Making Marketing Work More Sustainable

*Stress, overwork and frequent interruptions plague teams of all shapes and sizes. Agile Marketing aims to mitigate these issues by insulating the team and provide a more sustainable pace with a consistent flow of marketing work. By getting out of fire-fighting mode, marketing departments can begin to focus on providing value to both their customers and their organization.*

Explain how to balance responsiveness and flexibility with stability and a predictable flow of work. Consider options for insulating the team from interruption while still embracing changing requirements.

## 3. SUCCEEDING WITH AGILE MARKETING

### 3.1. ESTABLISHING SHORT WORK CYCLES IN AGILE MARKETING

#### 3.1.1. Flow-Based Approaches and WIP for Agile Marketing

*One tactical option for transitioning towards Agile Marketing is to start by using a flow-based planning and execution approach such as kanban. There are five key practices: 1) visualization of flow 2) limiting work in process (WIP) 3) managing flow 4) making process policies explicit 5) looking for improvement opportunities in a collaborative fashion. Organizations start from where they are, continuing to use their current operating methods, roles and processes, and then steadily improve their flow using these practices.*

Explain what it means to use a flow-based approach to plan and execute marketing work, including developing a visual system to track work.

#### 3.1.2. Benefits of Short Iterations for Marketing Work

*The iterative approach remains the most popular way of implementing agile in a software development context, and it tends to be the most well known among knowledge workers in general. While marketing professionals are still trying to figure out what approach works better for them, all Agile Marketing practitioners should be familiar with iterative approaches. Beyond simply understanding the iterative approach to marketing, participants should explore the artifacts and roles that accompany iterative approaches, including common adaptations that allow them to work more effectively for agile marketers.*

Describe key practices, roles and artifacts of iterative agile approaches, most commonly encapsulated in the Scrum framework. Provide examples of adaptations that marketers can try if more prescriptive iterative practices do not quite work for them.

## **3.2. EXPERIMENTING, LEARNING AND PIVOTING**

### **3.2.1. Creating a Culture of Experimentation and Validated Learning**

*Predicting what will and will not work ahead of time is notoriously difficult in marketing and in business in general. Even the most seasoned marketing veterans cannot be certain what will work. Agile Marketing is useful because it embraces an experimental mindset intent on learning what works through empirical results, not by relying on conventional wisdom or opinions. To get to this point, marketers need to move away from long-term campaigns and create a culture focused on validated learning through a well-documented experimental process.*

Show how to weave in experimentation into an Agile Marketing process and gain familiarity with experimentation-oriented frameworks and practices.

### **3.2.2. Using Marketing Data to Inform Pivot / Persevere Decisions**

*Having data and getting feedback is insufficient unless accompanied by action. The results of experiments and feedback from marketing activities needs to inform the way forward: pivot, persevere or abandon.*

Show how validated feedback needs to be actionable and actioned. Provide examples of changing plans, changing approaches, abandoning things that do not work, amplifying those that do and pivoting to new directions based on the information collected.

## **3.3. MAKING IT REAL: AGILE MARKETING IN PRACTICE**

### **3.3.1. Agile Marketing in Real Life (Case Studies)**

*Agile Marketing case studies showcase the successes and learnings that companies are realizing. Students are looking for proof that Agile Marketing works, hence the need to provide real-world examples to reinforce that it does.*

Reinforce participants' understanding of agile principles and practices by seeing them used in one or more real case studies. Help participants identify lessons from case studies that can apply to their situation, even if the subject of the case study does not mirror their situation.

### **3.3.2. Crafting a Compelling Vision for the New Marketing Approach**

*Adopting Agile Marketing changes the way organizations, teams and individuals work. For change initiatives of this scope to be successful, they need to have a clear and compelling vision of what success looks like and the path to get there.*

Provide examples of a compelling vision for an Agile Marketing transformation and options for getting to the desired end stage. Discuss how to work with resistance and reservations, including offering small, low-risk steps on the path to organizational agility. Emphasize the importance of being agile when adopting Agile Marketing - adapting to the context of the organization and the teams.

### **3.3.3. Starting Your Agile Marketing Journey**

*Entire organizations cannot become agile overnight. To successfully apply the course's learning, students need an action plan they can put in place once they return to their jobs. In keeping with agile principles, this plan can be structured as a series of experiments, complete with a hypothesis and specific learning outcomes.*

Contextualize the lessons from the course, focusing on the constraints of their own systems such as internal politics, budgets, team structure and culture. Brainstorm different alternatives for starting down the agile path, structuring each as a short-term, low-risk experiment. Understand the pros and cons of an incremental rollout compared with a larger organization-wide transformation.