

Sixth Annual CMO's Agenda™

THE AGILE ADVANTAGE

THE METHODOLOGY

The image features a central blue circle with the text "THE AGILE ADVANTAGE" in white, bold, uppercase letters. This central element is surrounded by a network of smaller, light blue circles connected by thin, dotted lines, creating a web-like pattern that extends to the edges of the frame. The overall design is clean and modern, emphasizing connectivity and structure.

THE AGILE ADVANTAGE

AGILE IS THE NEW BLACK

We live in a world of profound and constant change where companies big and small must rapidly adapt to survive. Technology and innovation are disrupting the marketplace and transforming industries. More than ever, marketers battle the “always on” environment that runs counter to the traditional way of operating. The old way of doing things—highly structured scope-and-sequence creative and production processes—does not meet rapidly changing business requirements and constantly evolving consumer behaviors. Simply put, the way we think about and execute marketing is in flux.

The Sixth Annual CMO’s Agenda™ investigates how marketing organizations like Discover, HP, Hershey’s, SAP, Teradata and more are staying relevant in a world of accelerating pressures for growth and innovation. There is no one-size-fits-all solution, but our research found an emerging and compelling new story about business. One where agility is essential because it gives marketing leaders the ability to quickly react and respond to the market, adjust when things don’t work, get to market faster, and be more responsive to customer needs. And they’re achieving it through what we call **The Agile Advantage**.

PART MINDSET, PART METHODOLOGY

.....
 The CMOs who are embracing Agile are quite possibly the closest we've seen prepared for reality—a future of constant, rapid change.

To understand The Agile Advantage as a whole, it's important to first understand its major components separately; our findings are broken up into two reports:

- 1. THE AGILE MINDSET**—Focuses on how CMOs are transforming their enterprises through leadership and organizational values expressed via *The Seven Principles of Agility* ([see our companion report](#)).
- 2. THE AGILE METHODOLOGY**—Focuses on the processes to advance organizational agility and the Agile Mindset that can be adopted by project team, department or company wide.

Agile describes a shared organizational culture and formal set of processes based on iterative and incremental activities and cross-functional teams. It was first developed and applied by the software development community ([see "Agile Manifesto"](#)). Drawing from this foundation, Agile—in the context of marketing—is helping today's CMOs evolve their organizations with speed and effectiveness.

THE AGILE BIRD GETS THE WORM

Agile gets CMOs away from the traditional waterfall—a classically linear, stage-by-stage operating approach associated with slow, top-down decision making—to keep things moving forward at a sprint-like pace. With Agile, marketers embrace a specific set of cultural values—*The Seven Principles of Agility*—that promote a collaborative approach to projects, testing and learning, continuous prioritization, and more. Ultimately, this culture of agility increases marketing's speed, relevancy and responsiveness.

CHANGE IS A GOOD THING

Instead of one big project that culminates in one big result, Agile marketers are chunking things into bite-sized pieces that enable them to adjust, change course, and respond to new information throughout the project instead of at the end. Through this filter, they operate in the here and now; their teams see change as an opportunity for rapid iteration and test-and-learn activities versus roadblocks.

PRIORITIES EQUAL IMPACT

With Agile, marketing teams choose activities with the highest potential impact for their projects and put all other activities on the backlog. This system provides marketers the ability to stay proactive while continually managing their priorities and incoming requests.

CUSTOMERS RULE (FOR REAL)

Operating with the customer at the heart of their activities, Agile marketers prioritize projects, features, and functionality from the best starting point. And none of this is done in a vacuum. Marketing leaders are leveraging research, insights, test-and-learn, experimentation, and hard data to understand customer needs and deliver against them.

THE AGILE ADVANTAGE

In the Sixth Annual CMO's Agenda, CMG Partners shares insights and experiences from more than 40 lead marketers and Agile experts who are evolving their organizations into keenly focused units dedicated to being more effective in the modern marketplace, creating more value to the customer and moving the needle on organizational KPIs.

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Part 1

AGILE BASICS

HOW AGILE WORKS

Instead of the traditional waterfall method, where the end-game is defined up front and teams don't course-correct along the way, Agile focuses on reality-based prioritization to create marketing initiatives that meet customer requirements. Agile breaks big, long-term deliverables into mini-projects, delivers small wins every few weeks and iterates toward an optimal solution.

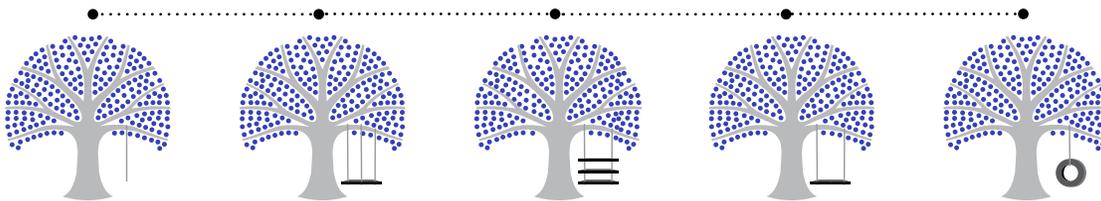
"Every month, every quarter, every year, there's something that fundamentally impacts your underlying business model," explains Jonathan Becher, CMO of enterprise application software developer **SAP**.

"The reason I want the ability to adapt is not so much to be faster, because I think we're pretty fast, but because the needs of the consumers are changing much more quickly. I need to be faster on my feet, not faster at what I do. But just speeding up that process isn't interesting; it's being able to put 10 more processes in place that I didn't envision when I started and that ultimately improve the customer experience that is exciting."

THE WATERFALL PROCESS: Predetermined



THE AGILE PROCESS: Iterative



Agile also dramatically cuts down on misdirection and miscues because it's based on weeks between concept and delivery vs. months. Frequent status meetings focus on what's working, what's done and what's keeping us from doing more, making it harder for problems to hide. If things change or people go off course, it's a quick correction, not a complete overhaul.

ION INTERACTIVE'S SCOTT BRINKER ON HOW AGILE WORKS (Adaptive Management)

There's more to the methodology but at the highest level it's getting away from the big long cycles of planning and delivery and making them more iterative and incremental.

Scott Brinker is co-founder of **ion interactive**, a digital marketing software and services firm. Here's how he explains Agile for Marketing:

TRADITIONAL PROJECT MANAGEMENT FOLLOWS SOMETHING CALLED THE WATERFALL, where you start with this high-level planning and spec'ing. Once the planning is done, you separately engage in building and executing that project (which could go on for weeks or months at a time). And then only after that's all done—it's either out in market or delivered—then you start to get the measurement of it. And after enough measurements have been collected you come back and evaluate.

THE PROBLEM IS THE WATERFALL APPROACH ISN'T VERY ADAPTIVE. Whether it's for a marketing campaign or a software product, it ends up being this really long feedback loop. And now we're in this environment where things change so quickly. Market conditions change, people are in a position where they can give us much faster feedback and reactions on things in the digital space.

AGILE REVOLVES AROUND BREAKING PROJECTS DOWN INTO MUCH SMALLER CHUNKS. Spend a couple of days doing a little bit of planning to focus on what we're going to do over these next few weeks. For a one- to four-week period, we have a mini-plan. We execute things typically with some sort of metrics towards how we will know that this is going well. We might do an iteration or two to see this really isn't having the impact we want, or something unexpected that's even more important comes up. Because we've got these mini-plans, it's very easy at any one of those sections to reprioritize. We take whatever we've learned and wrap that into the next generation. We ask if we want to move this campaign forward and if so, what would be the things we would change.

COMMON ROLES

Role clarity is an important consideration when using the Agile methodology because organizational structure and work process are dramatically different than more traditional approaches. "Self-managed projects is a different way, because Agile is not just 'let's do what we were doing before and do it faster,'" explains the VP of a leading virtual meetings provider. "You need individuals to adapt to the new roles that are required in an Agile process. Can your project manager in the previous role all of the sudden be your marketing Scrum Master? Maybe, maybe not. So you've got to put the right people in the roles and you've got to be very cognizant of what those roles and responsibilities are as it relates to the new framework."

Agile work groups take many forms but the most common is the Scrum, which borrows language from the rugby community and includes three primary roles:

1. PRODUCT OWNER

- Owns the "what" of a project
- Defines and prioritizes backlog
- Defends value to the customer
- Writes/approves user stories

2. SCRUM MASTER

"Scrum" is the technique used to manage work through activities (i.e., sprints, stand-ups and showtimes) and "artifacts" (i.e., backlog and burn-down chart).

- Owns the "how" of a project
- Oversees backlog
- Manages interactions among team members
- Facilitates stand-ups
- Alleviates blocks

3. TEAM MEMBERS

- Possess skills necessary to complete each sprint (members can be similarly skilled or multidisciplinary depending on project requirements)
- Ideally are full-time on one project team at a time (some companies specify the amount of time employees devote to team activities)

KEY STEPS

Here are the basic steps for executing an Agile project:

1. **CREATE USER STORIES** to quantify value to the customer (needs, problems or behaviors) and set clear success metrics for each.
2. **DEVELOP THE BACKLOG**—a list of the projects, user stories and associated tasks—to outline project needs for a specific period.
3. **PRIORITIZE THE BACKLOG** based on value to customer, task dependencies, time sensitivity and relative risk (i.e., is the task mission-critical or optional?).
4. **SCOPE THE PROJECT** to understand the amount of work and the team’s capacity and available time to complete it.
5. **PLAN “SPRINTS”**—Two- to four-week focused efforts to complete highest priority items and deliver a useful work product, such as a storyboard or outline.
6. **HOST REGULAR “STAND-UPS”**—15- to 30-minute daily meetings—to report what was accomplished since the last meeting, what must be accomplished before the next one and what, if any, obstacles are in the way.
7. **REVIEW, REPLAN AND RE-PRIORITIZE** based on feedback from previous sprint results and testing data. Take one or two items that need to be fixed or addressed and put them on the backlog.
8. **REVIEW THE PROJECT** in a “retrospective” or “showtime” to deliver results and understand what worked and what didn’t.

KIRSTEN KNIPP ON KEY COMPONENTS

Kirsten Knipp is VP of brand and product marketing at **Bigcommerce**, and an early adopter of Agile in her prior role with HubSpot. Here, she shares some insights on its core elements:

USER STORIES:

Today, marketers are expected to deliver value and ROI and specifically speak to numbers. Agile is one of the things that forces people to add “the what.” As a marketer I want to build a landing page for this-and-that so...what? It forces you to write user stories almost like you would write an MBO [measurable business objectives]: so that I can “capture a new market segment of 20,000 users” or so that I can “improve conversion by 2 percent and get 5,000 more customers.” Even the way the words are structured forces you to think through what is the end result to the business and what drives that accountability and business value.

SPRINTS:

Operating on 2- to 4-week sprints, you’re working to achieve a certain outcome by a date. Everybody knows what they’re working on and has a very clear sense of what their top priorities are. The ability to keep moving the ball forward is also phenomenal.

BACKLOG & SCOPE:

You can have this big hairy goal, but if you don’t break it down into manageable chunks it’s very hard to make progress. There can be a lot of problems just in the initial definition of projects within a marketing organization. If you say “build a demand gen initiative around X or Y,” or “create a storyline X or Y,” and one person is like, “oh, this is a two-hour thing I can do with a blog post” and another person interprets that as “this is a 20-hour project that needs creative resources and all these other things,” you really haven’t defined it well enough.

STAND-UPS:

There’s a benefit from Agile in that you don’t say, here’s an MBO, go work on it for a quarter, come back to me afterwards and oh crap, I sent you in the wrong direction or you interpreted the wrong direction or we didn’t communicate it clearly. With more frequent daily or twice-weekly meetings, it’s what are the big themes, what’s going on, has anything changed, where are we, and what are your roadblocks, etc. Frequent, short meetings help identify any mismatches very quickly.

Research conducted at the Massachusetts Institute of Technology (MIT) suggests that agile firms grow revenue 37 percent faster and generate 30 percent higher profits than non-agile companies.

PRIORITIZATION:

If we've all agreed that your stories are this and the priorities are that and there are priorities 1 through 10, when you're working on priority #2 and you get a question about priority #8, you know that you can defer the answer until you finish the thing that's going to move forward #2. If someone needs something further down the list, you explain why it has to wait. Unless something has shifted in the business that changes priorities, team members know that they can make decisions and do the right things with resources and assets.

REVIEW/SHOWTIME:

By presenting our reviews we earned more credibility within the organization. There's a lot of black box around marketing. The results-reporting piece was a huge credibility builder.

ABOUT USER STORIES

Knowing what a customer values about a product or service is the linchpin of Agile. A user story is a simple statement to set the stage for every Agile project. To craft a user story, follow this standard format:

As a [type of customer/user] I want to [do something] so I can [goal or benefit]. (Source: ASPE ROI.) For example, "As an evaluation lead, I want to be able to see within five seconds what differentiates your product from the competition so I can determine if you're a fit for my preliminary list of candidates." In this example the measurable outcome or "success criteria" is "pass a 5-second test for recall of our differentiators."

"We obviously get market feedback and customer information and incorporate that into our thinking and philosophy," notes the VP of a leading virtual meetings provider. "User experience is key, value change is key and you don't really have a strong appreciation of those unless you are talking to your customers. Surveys are fine, but you have to engage with them. You have to sort of be in their world and see what they're doing with other products. You have to have reviews with multiple users, not just one person within that organization."

This customer-centricity gives teams a deeper understanding of what's at stake for the customer and drives work toward addressing that in a measurable way.

"We've got a much better customer-centric sense," explains Bob Boehnlein, GM of marketing operations at database software maker **Teradata**. "As we've embraced Agile, we've used these cycles to get close to our customer, understand how the customer is responding to our messaging, understand how our markets are responding to our positioning and our campaigns, and understand from a product perspective how our customers are consuming our features. I wasn't necessarily expecting [this] when I started down this path. I was expecting to get more productive and faster, but I was pleased to see that we can be more responsive to customers and more effective in terms of aligning to customers' needs as a result of this as well."

THE SEVEN PRINCIPLES OF AGILITY

No process or methodology can help a marketing organization achieve the Agile Advantage without a contextual framework and culture that genuinely embraces qualities like transparency, collaboration and experimentation. A primary focus of the Agile Mindset, these shared organizational values are expressed through CMG Partners' research as *The Seven Principles of Agility*.



AGILE PRINCIPLE #1 – Flexible and Focused

With sprint planning every two to four weeks, teams prioritize work more fluidly, constantly updating and evaluating quality and quantity of output. The sprint cadence enables shifting of resources and priorities in real-time based on real-world events, not arbitrary plan dates.

“Actively prioritizing what’s on the plate at any given point in time is super-important, and that allows you to have a good plan going into a quarter, into a year, whatever your planning horizon is,” explains Tom Vogl, CMO of **The Clymb**. “You’ve got an ongoing process for adjusting on the fly to all the new stuff that comes up, when something slips, or if the scope of a project ends up being bigger than you thought it was going to be. It’s also a really nice way to help somebody to be productive and make sure that their work is mapping to your most important priorities but that you’re not overloading them with too many things at any given point in time.”

The textbook example of flexible and focused is the Oreo Super Bowl power-outage response. The now-infamous “Power Out? No Problem” tweet included a link to a photo of the iconic cookie with the cutline: “You can still dunk in the dark.” It was created, designed, approved and posted within minutes of the actual event. The results? Reportedly 15,000-plus retweets with an estimated reach of three million Twitter users.

AGILE PRINCIPLE #2 – Data-Driven

Data is both a by-product of Agile (feedback from rapid iterations) and a driver of it (customer-focused user stories). Every user story includes a clear measurable outcome to determine if the sprint and ultimately the project achieved the goal. Tracking, reviewing and operationalizing data points creates more relevant marketing that generates better results. Agile also enables you to incorporate evaluative data during the creative process, not just after launch.

Kim Wells, **Scottrade’s** chief marketing and digital officer, explains. “We have feedback loops not only from the client but also from the teams that are putting campaigns in market. We’re able to feed back to the Agile core teams what’s working and what’s not. So whether it’s paid search, paid display, programmatic buys—whatever it is that we’re doing to measure the success of that campaign work gets fed back pretty quickly to the Agile team. I think that’s a process that works in our favor.

“We encourage an environment of empowerment, where we’re really trying to help associates understand that they are empowered to bring forth the big ideas, get those ideas or little ideas activated and see how they go. We have a rich test and learn environment where we’re okay with putting out a bunch of different ideas and seeing what gets traction, and I encourage that because I think it’s the only way that we can continue to do a good job of reaching and delivering value to our clients.”

Another example comes from Leslie Snavely, VP of marketing and corporate business development for **CHG Healthcare Services**, a staffing firm serving the health and medical industry. “Data shouldn’t just be analyzed; it should be actionable. We use our data to make decisions because it’s in a digestible form. Just this morning, a data expert on my team walked me through the spending of our largest brand from last week with his recommendations on how to adjust our plan for next week. Based on the data analysis and our willingness to take action, we were able to cut the budget by more than 50 percent, yet still capture the same quantity of leads. That’s agility at its finest.”

7 PRINCIPLES

1. Flexible and Focused
2. Data-Driven
3. Iterative and Experimental
4. Clear and Transparent
5. Collaborative
6. Empowered
7. Customer-Centric

AGILE PRINCIPLE #3 – Iterative and Experimental

Iteration and experimentation speed improvement and spur innovation, so you can succeed or fail faster and cheaper.

“Agility is often associated with test-and-learn and fast iteration/fast fail,” says the VP of a global electronic payments platform. “An agile company goes one step further and moves into test, learn, do—test, learn, make—test, learn go. Agility to me means constantly moving forward at scale. How do we make this thing better and how do we put impact into the marketplace?”

May Petry, **HP’s** VP of digital marketing, agrees. “Agile development enables me to test, learn, iterate and execute much quicker. If we didn’t apply the Agile lifestyle, I wouldn’t be able to iterate and respond to change as quickly as I can right now.”

AGILE PRINCIPLE #4 – Clear and Transparent

Too often, management decisions aren’t explained to the people charged with executing them. This creates confusion at best, ill-will and mission-creep at worst. In Agile, projects are clearly defined in terms of customer value. Critical tasks are identified and prioritized so everyone’s clear on what needs to be done first. This enables team members to produce iterations of complete units of work for evaluation based on clear criteria of “done.”

“One major thing that slows a company down is lack of a shared purpose, or a lack of understanding around what they’re solving for,” explains the VP of a global electronic payments platform. “If you want to move fast, you have to know where you are going. That’s why our goal is to join people together around shared purpose. This is the essence of what we want to accomplish.”

The backlog of tasks is published so all team members know exactly what will happen over each sprint and the course of the project. At the end of every sprint and project, “showtimes” are held to share products and results with the team and beyond. This enables the team to see opportunities for iterating and improving along the way and helps the rest of the organization understand what marketing does.

“Where people learn is the interacting and talking about their experiences—I think that’s the best way to do it because it creates muscle memory of what happened, why it happened, and it also creates relationships that help the next program establish better team connections,” notes Elisa Steele, EVP of strategy and CMO of **Jive Software**, the leading communication and collaboration platform for modern, mobile business. “It’s a mix of discipline of writing things down and that face-to-face interaction. We try to put real time into sitting down together and actually having a discussion about what happened. There’s always a backstory and it’s never written in the case study. That’s where you get the learning—whatever the backstory is.”

AGILE PRINCIPLE #5 – Collaborative

In Agile, collaboration means not only working together toward a goal, but respecting priorities and assisting when needed. Teams are organized around tasks and may be similarly skilled (able to pinch hit for each other) or multidisciplinary (able to pitch in). Members collaborate to determine priorities, plan sprints and execute.

“It starts from a position of trust, trusting each other that we’re going to be here to accomplish the same goal and we’re all here to support one another,” says Allison Cerra, VP of marketing for **Alcatel-Lucent**. “It’s not unusual on my team, if I need resources, to pull from Sandra on the other side. Whether that’s headcount or budget, she willingly and freely understands we’ve got objectives to get done, we have big bets we’re betting on. I’ve got to do my part and if I need to help the greater good I’ll help the greater good by taking it on the chin for a quarter.”

AGILE PRINCIPLE #6 — Empowered

Agile teams form around tasks in an all-hands/all-brains effort to complete them. How the work gets done and by whom is often determined by the team itself (known in Agile parlance as “self-organizing”).

“A lot of Agile marketers are reorganizing their teams around the customer and the sales cycle rather than traditional marketing functions,” explains **AgileMarketing.net’s** Jim Ewel. “So instead of thinking about PR as ‘I’m a PR person,’ it’s more about, ‘I’m trying to increase awareness of our company.’”

In the Agile framework, one group—often individuals charged with strategy and planning—decides what needs to be produced and its value to customers. Another team—usually those closest to the actual work—determines how it gets done and measured. This work group is trusted with decision-making around how (backlog, tasks) and when (sprints) the product is delivered. Respecting the what/how line grows trust, improves productivity and drives employee satisfaction.

“It’s been very different to feel like you can move fast with ideas because you’re not concerned that your management may not support you if you bring those things up,” says Tobias Lee, CMO of information technology and services firm **Thomson Reuters**. “So in this organization, that’s really helped us be a little bit faster with ideas and ideation.”

Kirsten Knipp, **Bigcommerce’s** VP of brand and product marketing, agrees. “Success is having a well-oiled team that...feels empowered. They know what they need to get done, they feel like they can go do it quite easily and they know when to ask for help. They have a sense of not having roadblocks that are stopping them from achieving these things in this time frame, versus ‘I know when I have a roadblock and I know how and when to act like that.’”

AGILE PRINCIPLE #7 — Customer-Centric

Agile teams are all about the customer, from designing projects and detailing user stories to developing backlogs. Decisions, definitions, priorities and pivots are based on real-time customer data, both demo/psychographic research and direct feedback.

For example, **Medifast**, the weight-loss company, launched an enterprise feedback management system based on the net promoter score.

“Across our entire organization we’re making sure that we’re getting feedback directly from the customer on a daily basis and looking at all the dashboards,” explains EVP and CMO Brian Kagen. “As we see trends we’re reacting to the consumer and then we can also be proactive and forward-planning based on what we see from that consumer feedback.”

One challenge with using real-time consumer information is abandoning ship. In many companies and for many people, giving up on a project—even if the feedback indicates that’s the best course—feels like quitting. That mindset must change for the customer focus to be truly paramount.

“Don’t be scared to throw something away that you worked on,” explains Travis Arnold, founder of **Harbinger Labs**, a software marketing agency. “It’s really tough as marketers to put your heart and soul into a project that doesn’t resonate with buyers. So why continue to do the same thing and waste more time and waste your buyer’s time? It always comes back to the buyer. That’s the root of everything. It comes back to the person you’re building programs for and attaching everything to their problems, hopes, dreams and fears. This helps you build something that’s really kick-ass for them.”

BENEFITS OF AGILE

Sixty-seven percent of CMOs surveyed note Agile results in a more motivated team.

DO MORE, FASTER AND BETTER

MORE

“I began with the relaunch of the brand and the website—two separate work streams inextricably tied because we couldn’t launch the new brand without the website. We used data—both qualitative and quantitative—to really hone what we were going to drive into the market that would help solve customers’ problems and be highly valued by new customers. Adopting a way more Agile approach, we probably pulled off in 5-1/2 to 6 months what most organizations would do in 12.”

– Lisa Arthur, CMO of Applications, **Teradata**

FASTER

“Because of the infrastructure that we had to work with, I would say we were about double the pace that they had been when I first started with that team. We were executing and iterating much more rapidly and actually getting the results from A-B tests and things like that that were starting to make an impact.”

– Kirsten Knipp, VP of Brand and Product Marketing, **Bigcommerce**

BETTER

“On one project, we had almost a 3,000-x lift in performance and drove a 30 percent increase in trials quarter-to-quarter, just purely because of this process. And we’ve done nothing else that was different other than use these processes on this one particular campaign.”

– Jascha Kaykas-Wolff, CMO, **Mindjet**

BUSINESS NEEDS ARE MET WITH AGILITY

BUSINESS NEEDS

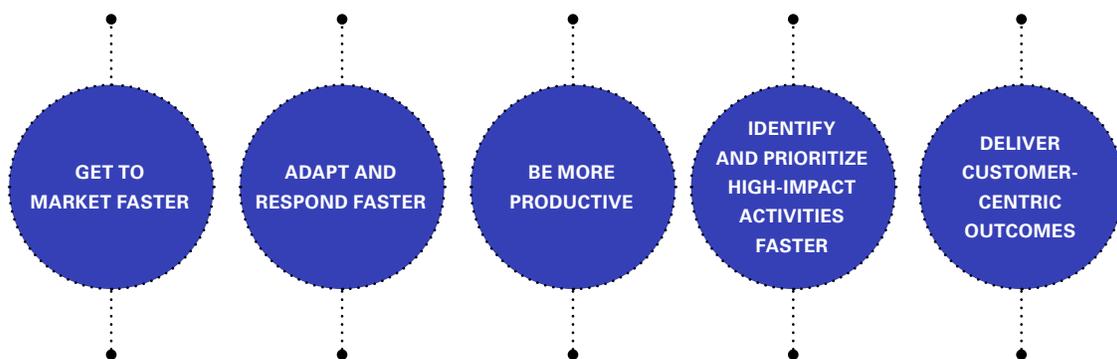
88% of non Agile users say improving speed to market is a priority

91% of non Agile users say being able to switch gears more quickly and effectively is a priority

96% of non Agile users say making their team more productive is a priority

88% of non Agile users say enhanced prioritization of the things that matter is a priority

89% of non Agile users say delivering a better, more relevant end-product is a priority



RESULTS OF AGILE

93% said adopting Agile helped them to improve speed to market (ideas, products or campaigns)

93% said adopting Agile helped them switch gears more quickly and effectively

87% said adopting Agile made their teams more productive

80% said adopting Agile led to an enhanced prioritization of the things that matter

80% said adopting Agile helped them deliver a better, more relevant end-product

BONUS BENEFIT: Motivate

Beyond the obvious improvements in productivity and performance, Agile improves more qualitative measures like employee energy, enthusiasm and morale, too. In fact, 67 percent of CMO's Agenda survey respondents who adopted Agile said it resulted in a more motivated team.

"If you think about the big issues that employees typically have where they become unengaged, they're almost always related to 'I don't understand what my manager is doing' and 'I don't understand what I'm doing that's contributing to the business,'" explains Jascha Kaykas-Wolff, CMO of **Mindjet**, developer of an innovation management suite for global enterprise companies.

"If you can address those two things with a business process, it puts you in a better position as an organization. As a team, [we] have better awareness of what we're doing across different departments in our organization, and it's also helped us globally. Our alignment between international and domestic has gotten considerably better because our corporate team is transparent about what they're working on, the priorities that are being set, and the items and the stories that are being pulled on the backlogs are being selected by the teams cooperatively."

WAYS TO MEASURE AGILE

Companies can customize their Agile approach right down to what and how they measure its impact. One marketing executive describes the areas of measurement he finds most valuable:

CLASSIC MARKETING METRICS:

"The measurements we continue to look at, really, are the classic marketing measurements because it all ultimately boils down to that."

EFFICIENCY/THROUGHPUT:

"I also look at the velocity of how quickly we produce stuff. Just sheer brute force. Are we getting more things done? If we go from old process to new process in Agile and we're basically achieving the same things, we probably haven't progressed unless there's a measurable change in quality."

REVENUES AND PROFITABILITY:

"You see more things getting done that drive better fundamental marketing metrics, ultimately leading to more revenue and more data and insights and predictability over your revenue stream and how it relates to your funnel."

EMPLOYEE ENGAGEMENT AND MORALE:

"Are more people engaged in the organization? Are more people contributing? Is there a sense of enthusiasm? You're not going to necessarily have an enthusiasm meter on your floor, but you'll see the kinetic energy that's occurring with the teams."



Part 2

A LOOK AT THE EARLY ADOPTERS

WHY ARE CMOs TURNING TO AGILE?

CMOs use Agile to improve culture, speed, effectiveness and alignment, which in turn promote growth and profitability.

TEAM/CORPORATE CULTURE

Because Agile is part mindset, it's an effective tool for organizational change. The marketing leaders at **K12**, an online learning company, wanted to change the department's culture and adopted Agile to do it.

There's always pressure on companies—and their marketing divisions—to demonstrate effectiveness, scale and efficiency," explains EVP and CMO Celia Stokes. "I felt things slowing down too much. We had gone from a \$140-million company to nearly a billion dollars fairly rapidly. The kinds of waterfall processes that worked well in the past were becoming too cumbersome to drive the pace that we needed to drive. As we looked at all the ways to reorganize, we got very excited about this."

.....
Agile promotes profitability
by removing barriers and
streamlining processes.
.....

SPEED-TO-MARKET

CMOs no longer have months to develop and execute brand launches and relaunches. Today, marketing groups need to produce better and faster. Lisa Arthur, CMO of Applications for **Teradata**, knew Agile would enable her team to develop a new brand, website and GTM strategy super-fast. "There were 326 moving pieces and parts for that entire launch to be done in six weeks, and we did it," she recalls. "We really focused on being agile in that market responsiveness of what customers want and need and then responding to them with campaigns, with relevant offers and with sales programs to take advantage of that additional growth."

CONTINUOUS DELIVERY PROCESS

With consumers living more round-the-clock lives, CMOs need to deliver work quicker than quarterly or even monthly. And the old waterfall approach just doesn't allow for that kind of speed.

"The era of the annual marketing plan—that's basically one costume short of being a candidate for Renaissance Faire, right? It's a very old methodology that quite frankly just doesn't have relevance today," says **Teradata** GM of marketing operations Bob Boehnlein. He says the company's Agile adoption was "an opportunity for us to transition from traditional waterfall software development into a development process that was more amenable to continuous delivery. Something that we could put on a cloud that we could update on a weekly basis, show incremental results and build upon."

PRIORITIZATION

In a fast-moving world, everybody wants everything now. But accomplishing anything without losing sight of the overall strategy is nearly impossible without a consistent approach to determining priorities and managing competing ones.

“The unfortunate thing with the more waterfall design is we get these very big rigid plans in place which have certain disadvantages, but then there’s these fire drills that happen independent of that plan,” says Scott Brinker, cofounder and CTO of web development company **ion interactive** and author of the Chief Marketing Technologist Blog. “Because there isn’t necessarily a system for ‘ooh, how do I deal with this really urgent thing that just came up,’ it tends to be more ad hoc and ultimately very hard to manage. When you implement an Agile system, you’re providing a framework to deal with the unexpected and to deal with the more urgent things in a more structured and systematic way so it doesn’t have to be a fire drill every time something new comes up.”



For tips from Bigcommerce on aligning with non-agile groups, see page 26.

ALIGNMENT

Many companies’ manufacturing and software divisions already use Agile or its practices in their operations with great success. Many CMOs adopt Agile because they see the results it produces and understand the benefits of aligning different parts of the organization behind one methodology or mindset. Harit Talwar, EVP and president of U.S. Cards at **Discover Financial Services**, wanted his marketing team to do things faster. He didn’t know how to do it until he saw Agile working for the IT division. “We are reorienting our entire project management process between the business and technology to see what we did well for the new product launch and for mobile, how do we build a contingent impact of that for our other areas in marketing.”

SPECTRUM OF EARLY ADOPTERS

TECH & INNOVATION COMPANIES

For high-tech, innovation-focused start-ups, Agile is a no-brainer, and these types of enterprises are frequent early adopters. After all, this is where Agile’s roots lie.

“You can be innovative and deliver perfectly good products to market but I’d question whether you would be as successful if you weren’t at least keeping pace with the market,” notes Allison Cerra, VP of marketing for **Alcatel-Lucent**. “Most of the markets I’m exposed to are extremely hyper-competitive and if you’re not thinking way ahead, you’re going to find your innovation on a shelf somewhere instead of hitting a market right when your innovation is most needed.”

CHALLENGER BRANDS

Agile is a perfect fit for brands that are new to the market. Bob Kraut, SVP and CMO of **Papa John’s International**, explains: “There have been countless cases of smaller, more focused competitors taking on larger brands and being able to out-market them, not because they out-think them, but they move faster and there’s such a thing as a first-mover advantage. You can take advantage of a lot of first moves so you’re able to not only get credit from the image standpoint, but take advantage of getting higher margins when you introduce a new product category or a new service type, a new service channel, etc., before the bigger competitors catch onto that and then try to make up ground.”

LARGE LEGACY BRANDS

Agile might be more difficult to adopt in old-school enterprises, but the effort is worth it. Early adopters of this size typically launch within one department or for one project.

“Where the advantage is going to be in American business is for the companies that are big and fast,” Kraut notes. “That’s really scary because they have scale, they have intellectual horsepower, and they have expertise. Those things tend to kind of work like continuums—they tend to have more levels and they tend to have more review and the risk tends to be higher, therefore they move slower. But if you can combine those things to a big and fast operation I think that could be very powerful.”

RESPONSIVE DEPARTMENTS (Prioritize Test-and-Learn)

Early Agile adopters tend to be departments that have a high volume of ongoing work and can greatly benefit from testing and learning:

- E-commerce/digital
- Advertising/promotions
- Social media
- Content marketing
- Analytics
- Campaign measurement

“We’re seeing...more fast-moving, fast-changing ideas, changing customer behavior and changing technology, which means everyone now has to adopt new ways to keep up,” explains Stuart Eccles, CTO and cofounder of **Made By Many**, a digital product innovation company. “No one can stay still. Especially where your business environment is changing very rapidly, those are the places where Agile will be most appropriate because you need to get that kind of change...into your culture and into your processes.”



BEST USE CASES

- Culture of Agile already/naturally exists
- Industry/customer markets change rapidly
- Teams control 80 percent of their work

HOW CMOs ARE USING AGILE

CMOs and their organizations are applying Agile in a variety of ways—across project teams, departments and even company wide. At the highest level, Agile adoptions fall into one of two categories: informal or formal. Of the lead marketers surveyed for the CMO's Agenda, the split was about 50:50.

AGILE INFORMAL

Technology

Informally—but formally
in product development

Needed to change culture
and get to market quicker

Incorporated principles:

1. Highly collaborative
2. Highly iterative
3. Fail-fast mentality
4. Daily touch bases
5. Test and learn

2 years for full
transformation to
Agile organization

50%–75% faster than
they were before Agile
and incredible culture
improvement

AGILE FORMAL

Financial Services

Formally—entire marketing
organization

Wanted to be able to
address multiple client
segments—Waterfall
wouldn't allow her to
achieve this client-
focused strategy

Structured groups around
client types

8 months in market
organization and already
seeing great benefits

1. Constantly learning
and iterating—more
relevant output
2. Faster to market
3. More collaborative
4. More empowered,
excited culture

Both types of adoptions deliver against *The Seven Principles of Agility*, but Agile Formal is a more robust, far-reaching and structured program that generally involves adopting a set of prescribed processes and assigning specific team member roles. Sometimes CMOs hire external coaches to provide training and assistance. Agile Informal is more of a philosophy to achieve agility executed through a small set of strategies and tools from the Agile world.

CASE STUDIES

From reducing management layers to identifying top producers, Agile runs lean and forces people to run lean, too. Some lead marketers reported up to 25 percent turnover in staff, planned and unplanned. Others reported doing more with 20 percent less staff. When it comes to organizing an Agile implementation, it's a highly customizable process. Companies can pick and choose how they organize, build teams and execute based on their needs and priorities. Here are two inspiring examples from Scottrade and HubSpot.

SCOTTRADE: An Appetite for Change

Scottrade used Agile to generate client feedback faster while optimizing strategies and creative in as close to real-time as possible. The company arranged core teams around client segments to address them simultaneously. Each segment was assigned a team lead accountable for metrics. Scottrade also formed multidisciplinary teams—acquisition, retention and engagement—within respective client segments as well as centers of excellence (content development, digital and segmentation related), orienting core teams to their particular segments. Through Agile, Scottrade gained efficiencies and learned the benefits to having everything in-house, including the data. While getting their team comfortable with Agile was a known challenge, Scottrade started out on the right foot with an appetite for change.

HUBSPOT: Productivity Please

HubSpot's marketing team used Agile for increased throughput and transparency and to strengthen relationships with other parts of the company. Taking a hint from their colleagues over in the software department (who use Agile to stay productive despite urgent distractions), the marketing team organized its Agile rollout around its sales funnel and used an internal Wiki to stay organized instead of Agile software. A marketing board provided necessary oversight while predefined metrics unified teams with a clear vision for what they should and could achieve. They skipped the burn-down chart (too difficult), and set parameters for how much/little time teams would put towards ongoing activity. To accommodate longer planning sessions, they moved to four-week sprints.

FURTHER CONSIDERATIONS: Balancing the Important and the Urgent

Marketing, like IT, is often the department people come to with burning-fire issues (at least in their own eyes) that need immediate resolution. And they think being "agile" means you're going to drop everything and do it. It may be tempting, but there's a need for balance.

TASK A TEAM MEMBER

"If you leave it to some random cosmos to come together magically, it doesn't happen because the urgent always pushes out the important," laments Allison Cerra, VP of marketing for **Alcatel-Lucent**. "You're always going to be beholden to what's urgently happening in the business today and you're not going to get to making that phone call to say I need to schedule that meeting with that sales person so that I can get in front of his customer." Cerra assigned a team to make important customer contacts to ensure the task is completed.

CREATE A TEAM

At online learning company **K12**, EVP and CMO Celia Stokes created a rapid response team to handle late-breaking projects. "Our department was suffering from a cycle of the urgent always eclipsing the important because there is such a high volume of production-oriented work that needs to be done constantly. It can't be put off or the opportunity passes," she explains. "We still have a lot of what I call "short-order cook" work, stuff that comes in that we didn't anticipate at all that just needs to get done. We tried to organize one team around that—not just taking orders and moving them through quickly but trying to get ahead of this kind of work."

MANAGE TIME AND PRIORITIES

A transparent, public backlog gives everyone a look at what's happening at any given time, enabling team members and those making requests to have a more effective conversation about priorities. For example, to make sure all bases are covered, **HubSpot** dedicates a percentage of everyone's time to doing overflow or emergency work. So the maximum of any individual's time on sprint-related work is 75 percent, the minimum is 25 percent.

AGILE'S IMPACT ON THE ORGANIZATION

Lead marketers using Agile report doing more with 20 percent fewer employees.

FLATTENS THE INFRASTRUCTURE

Less hierarchy and bureaucracy and more accountability and communication enable a flatter workplace. Agile reduces the number of layers to three or four, including the CMO, the leadership team and Agile teams. Some CMOs have found they need fewer "infrastructure roles," too.

"We think we can do more with fewer project managers," notes Celia Stokes, EVP and CMO for **K12**. "It always felt like we never had enough project managers. There is a project manager assigned to the teams, but the teams now are performing a self-regulating function because each person every day has responsibilities to the team. [Agile] has changed both the pipeline and the number of people we needed."

STRENGTHENS TEAMS

Agile teams are stronger and more effective. In many organizations, teams form and unform based on projects, forging new relationships and surfacing diverse perspectives. Members from different disciplines and departments work together, sometimes literally creating team workspaces, to achieve goals. Agile is also a useful talent management tool, identifying people with skills and affinities for certain kinds of work.

"It becomes painfully apparent when you look at how many tasks and how many story points someone gets done in a given month," explains Frank Days, VP of marketing, **CorrelSense**. Some CMOs using the Scrum framework estimate work with a points system in which a unit of work is defined in hours. Most marketers, however, estimate based on tasks, not points. Either way, Days notes, "It becomes really obvious how productive or unproductive someone is on your team."

IMPROVES EFFICIENCY

A flatter organization with projects run by motivated, focused teams can't help but result in higher productivity and effectiveness.

"We found we could significantly reduce headcount but actually improve flexibility in deployment simply by minimizing the number of steps to get to market. I think that's very key," says Steve Walker, former CMO and corporate vice president of **Sony Mobile Communications**.

Agile completely changes the organization's structure, whether it's a small team or a huge enterprise, so working groups can morph to meet changing needs.



Part 3

HOW TO ADOPT AGILE

TYPICAL ADOPTION PATTERNS

TOP-DOWN ROLLOUT

Inspired by Business Strategy Needs (High Stakes). When overall business strategy dictates a new way of doing business, CMOs look to Agile. This top-down adoption pattern typically manifests in a department-wide and/or marketing organization-wide rollout, like at online learning company **K12**.

MOTIVATION

- Stop urgent demands from trumping marketing priorities
- Improve marketing activities' desired impacts
- Demonstrate better efficiency in labor, tactical dollars spent and overall output

APPROACH

- Used marketing automation vs. Agile software tools
- Arranged teams around major initiatives including content marketing, social media, campaigns and B2B

MARKETING

- Had CMO participate on a team for a period of time
- Designated a person from each team to represent the customer, production, analytics and marketing
- Created an Agile team focused on the "short-order cook work," last-minute or unplanned projects that need immediate attention
- Tied teams to "the reason we do things" and doing more with fewer people
- Made voice-of-the-customer part of the everyday process

IMPACT

- Produced more throughput at higher quality
- Created new kinds of organizational tribal communities that cross disciplines
- Discovered a cadence and pace of work that inspires people

LEARNINGS

- Refining Agile operations takes about six months of iteration; then successes can be shared with other parts of the organization
- Teams take three to four months to really hit their stride (some are quicker than others)
- Focus was directed at using Agile to address dependencies in web development

BOTTOM-UP ROLLOUT

Inspired by a Department/Team Member (Low Stakes). It's easy for small groups to begin using Agile in their own closed ecosystems. Some teams prefer to test-drive Agile on a low-stakes, small-scale project, while others choose a high-profile initiative with a very short time frame. That's how they did it at global technology leader, **HP**.

MOTIVATION

- An executive shared her vision for how a digital team should operate with a technologist who told her she was describing Agile. The executive then teased management with where she was going to take the digital team in 18 months and what it was going to take to get there—investing in Agile.

APPROACH

- Adopted in one function—a strategic marketing initiative called Enterprise 20/20
- Formed one Scrum team
- Developed stories to support the launch
- Used internal Scrum Masters to train the team
- Hired a few people who had a propensity for the Agile mindset

IMPACT

- Took Enterprise 20/20 from concept to production in eight weeks, increasing download conversion and engagement numbers significantly
- Grew traffic, engagement and conversion rates for other initiatives

LEARNINGS

- Reward failure as long as team members learn from it
- Be the cheerleader for Agile within the organization

PHASES OF AN AGILE ROLLOUT

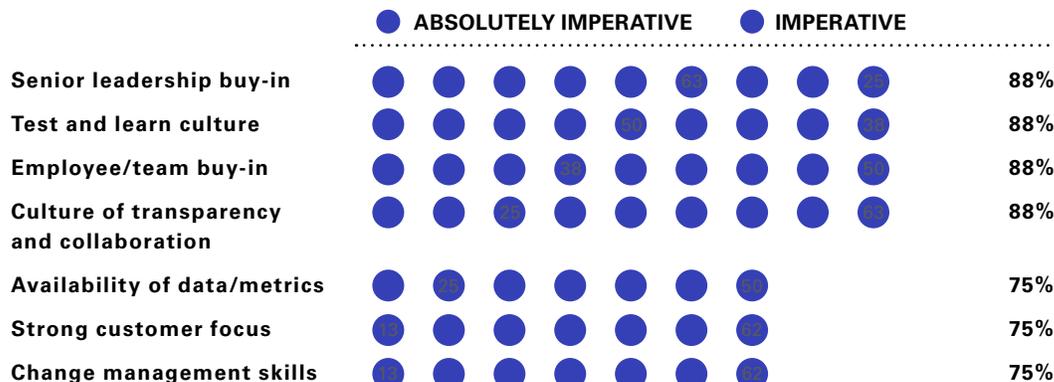
For a successful Agile rollout, it's important to address key considerations at each stage.



ELEMENTS OF AN AGILE ROLLOUT

LEAD MARKETERS ANSWERED THE QUESTION:

How imperative are each of the following to an Agile rollout?



ROLLOUT CONSIDERATIONS AND CHALLENGES

There are a lot of things to consider before diving into Agile. Chief among them is whether to apply Agile for Marketing Formal or Agile Informal, and whether to adopt across the full marketing department or within one group. That comes down to size (it's a lot easier to go Formal when you're small), need (if you have a big reason for change, go Formal) and Agile in other areas (if other teams are already using Agile, it's easier to go Formal). CMOs who've launched Agile initiatives offer this advice for navigating the various rollout phases:

PRE-LAUNCH: Planning and Preparation Phases

GET EXECUTIVE BUY-IN

Like any new way of doing things, Agile requires buy-in from the top level. Help them understand how Agile helps meet business objectives by involving them in sprint planning so they understand what you're doing and how you're doing it; sharing and celebrating the small successes and learnings of early sprints; and presenting the final product along with numbers/productivity gains.

"Have senior management and sales in the same room for sprint planning say, 'Look, here are our priorities. Here's what we need you focused on. What is the end destination—what does it look like?" explains Jim Ewel, author of the [AgileMarketing.net](#) blog. "You can have a really interesting conversation. Invite them back for the showtime so they see the process from end to end."

GET TEAM BUY-IN

It's mission-critical to secure team buy-in, too.

"We let all of the associates know what we were doing, why we were doing it," says Kim Wells, chief marketing and digital officer at **Scottrade**, of the company's Agile for Marketing adoption. "We tried to be very transparent and clear about the goals of the reorg and their new jobs and the new processes. We also put in place a very proactive feedback loop and we said, 'We're not going to get this right and we know it and we just want you all to come along with us and give us feedback as we go and we'll fix, just like you do in Agile.'"

SELECT WHERE TO START

You also can start Agile in an area to solve a key operational issue or deliver a critical initiative:

- Communication – Where are your silos and communication breakdowns? Where do you need to improve communication?
- Efficiency – Where are your efficiency issues? Where are you going to gain the most from improving overall efficiency?
- Need for integration – Where are you going to gain the most benefit from integration?
- Prioritization – Where do you have the most trouble with prioritization?
- Opportunity – Could you use Agile to develop a major initiative or a high-volume project with a lot of moving pieces?

DETERMINE TEAM STRUCTURE

Key considerations for creating teams are:

- Who can flex in a new environment versus who might resist
- Where are issues with collaboration and information flow and how they can be fixed through team composition
- Who is best suited to act on the customer's behalf and who is best to focus on strategy

POST-LAUNCH

ADDRESS NAYSAYERS

Address skeptics and doubters by identifying advocates to bring them along, creating a buddy system to support the less-engaged as they work on Agile teams. Don't try to convince them about the process. Instead, focus on the results.

"The what is what you sell and then the how is a detail," explains Frank Days, VP of Marketing for software maker **Correlense**. "What are we doing, what kind of program or campaign? And then you sell that Agile is the way to do it better." Then try it, perhaps on a smaller scale. "A friend of mine was complaining about how they've started using Agile and they're having all kinds of problems. I thought, well that's good, that's a sign that people are trying it!"

It's also important to celebrate small victories so team members feel successful. In the end, though, you and your team need to accept the fact that some members may not be a good fit. Attrition is expected.

MANAGE COMPLEXITIES

Some CMOs use coaches, especially for formal adoptions. These pros help develop cultural and operational mindsets and methods to get the organization up to speed and ready to launch quickly. Coaches also provide support during the early months of adoption and periodically throughout the first year.

"I wish I had found a coach or a mentor or somebody who had been there, done that," admits **Scottrade** Chief Marketing and Digital Officer Kim Wells. "In hindsight, I would try to have more training in place for the associates, so the minute they go into their new roles they go into some sort of formal training to equip them with those foundational skills they're going to need to run it."

TIPS FOR POST-LAUNCH

BE PATIENT

The amount of time it takes a team, business unit or enterprise to get “good” at Agile depends on its size, commitment and resources. For HubSpot, it took about three months until the marketing team was proficient.

SLOW DOWN TO SPEED UP

“It’s one of those slow down to speed up kinds of things, because just starting to do it and starting to document all your backlogs initially feels like a lot of documentation,” admits Kirsten Knipp, VP of brand and product marketing for **Bigcommerce**. “It feels like you’re slowing down and it kind of feels painful, so it’s kind of a dedication and a commitment.” But the investment is worth it because it yields better outcomes. “The conversations were so much crisper and clearer, and decision-making was so much easier once we all had this common vernacular on what is this story all about, what does success mean, what does it mean if we push, what are the dependencies,” she explains. “It became a much easier follow-on conversation if you made that investment up front.”

STOP FEARING FAILURE

Another hurdle is fear of failure. It’s anathema to lots of companies and employees. But managed, small and fast failure is at the crux of Agile.

“An expectation of failure, such that that’s not a bad thing, that’s how you learn,” asserts one VP of global marketing. “You have to allow teams to feel comfortable making decisions and coming back having made a mistake, which oftentimes is financial, like you spent a bunch of money and you didn’t get the leads. That’s the nature of marketing in my eyes. If they are prudent but comfortable in making those decisions, over the long term they’re making great decisions that benefit the company and that provide the adequate return on investment at a high level. And at the micro level they’re making very quick, iterative decisions and incrementing that to get a model that works and then expand and scale that model to the rest of the market.”

BIGCOMMERCE’S KIRSTEN KNIPP ON WORKING WITH NON-AGILE GROUPS

Once your team’s onboard with Agile, working with groups using more traditional methods is frustrating. After all, most companies—creative agencies included—are entrenched in and rewarded for waterfall.

Bigcommerce’s VP of brand and product marketing Kirsten Knipp has had some experience with that. She offers this advice for dealing with teams that aren’t practicing Agile, have no context for it, and are not okay hearing “that’s not my top priority right now.”

Sales is often the marketing organization’s customer, yet as Knipp notes, “Sales does not want to be, and probably never will be, agile in their own methodology.” It’s critical to explain how Agile works and what it means to how they work with you. “Unfortunately, oftentimes there is a fire-fighting culture in sales, and it’s mostly because it’s not bad until it’s bad in a sales market, right? It’s all humming along and then all of a sudden it’s oh my gosh—the forecast looks bad, what’s going on? Time to freak out and fix. “There can be tension when, midway through a sprint, sales says, ‘this is on fire’ and in most organizations, sales is the lifeblood—the business can’t wait for a sprint to complete in order to put out the fire. The beauty of Agile is that if something is really on fire, we look at our sprint and determine what things we could defer to go help sales succeed in the short term.”

HELP SALES AND OTHER NON-AGILE TEAMS

- **Create a transparent backlog.** This publicly visible running list creates context for outsiders making requests that can’t be met immediately. Knipp suggests delivering the news like this: “We can’t take that on board right now,” the key words being right now. “I hear that your initiative is important. I agree it’s important. It is not as urgent as these other things that we are working, so I am putting it on my backlogs and we will get back with you on when we can do it, not if we can do it.”
- **Designate a champion to support the team.** Always have one person on the team to take the heat so the folks doing the work stay focused on the task. “It is very challenging if everybody else in the company is just operating under pile-it-on pile-it-on pile-it-on,” Knipp notes. A designated go-to person handles all incoming requests, explains the Agile process and takes the request to the group for prioritization. This keeps other team members from having to deal with interruptions and expectations.

FORMER SONY MOBILE COMMUNICATIONS CMO STEVE WALKER ON LOSING TRUE NORTH

Agile's focus on the customer and employee-level empowerment make it possible to lose sight of the overarching strategy and key business goals.

Here's a cautionary tale from Steve Walker, former CMO and corporate vice president of cell-phone maker **Sony Mobile Communications**.

"If you become too flexible you lose control and you lose consistency, so while effectiveness and creativity may increase, efficiency and consistency will decrease simply because you cannot drive everybody in the same direction effectively enough. And that, ultimately, can reduce your brand equity and the impact of your marketing investment because your message isn't cutting through, you're not achieving critical mass, and you're not really building your brand in the eyes of the consumer in a strong and consistent way."

Sony Mobile had enabled so much flexibility that local marketers could disconnect from the corporate strategy and adopt their own approach with little governance.

"When everybody is diverging from the thing that you're aiming for, the net effect is you achieve far less than you were hoping to with your Agile deployment," Walker says. "You end up having to pull things back and say, 'No, we need to stop the flexibility. We need to really come back to our core again and determine how much to centralize and how much to localize.' It's really finding that balance."

AVOID OVER-FLEXING

- **Consistent and continuous strategy articulation.** Communicate regularly with teams to ensure their work lives up to the strategy and brand architecture. "Whilst I gave my local marketing teams a high degree of flexibility and agility, I was consistently and constantly reviewing their work to be sure that it really did live up to the standard," Walker notes.
- **Clarity around KPIs.** Establish clear KPIs and measure performance against short- and long-term metrics to ensure you're improving both. "It could be that things that you're doing in a very flexible way are good for some short-term profitability, but they're actually doing harm to the long-term brand equity," he explains.

WHAT MAKES AGILE STICK?



Agile is hard to stick to but not hard to figure out.

Mike Volpe, CMO, **HubSpot**

COMMITMENT

Changing mindsets and adopting new methodologies challenges even the most willing teams. It's going to be bumpy in the beginning and without complete dedication to Agile it can be tempting to throw in the towel. You must be committed enough to see it through for at least the first 6 months to see the benefits firsthand.

"If you go in half-heartedly and you make only small changes, you will actually get to the worst of both worlds quite easily," asserts Stuart Eccles, CTO and co-founder of **Made by Many**, a digital product innovation company. "Commitment and patience are mission critical."

SENSE OF URGENCY

Adopting and executing on the Agile mindset is often easiest when the stakes are high enough to ensure commitment to a new way of thinking and doing.

"There has to be an existential threat," says **K12's** EVP and CMO Celia Stokes. "There has to be a forcing factor. To really go through the discomfort inherent in the transition, there has to be a strong reason to do it."

DESIRE TO SERVE THE CUSTOMER

If you're not truly invested in being closer to and more responsive to customers, Agile isn't going to take. The customer is at the center of an agile marketer's universe.

"The primary driver for everything that we're doing should be making customers really happy," says the VP of a global electronic payments platform. "So my sense of urgency comes from 'are we making customers happier? Are we creating more loyal customers?' Creating business impact and creating revenue streams that come down to what are we solving for from a customer viewpoint is now how fast can we get there, because the competition is going to be there, because customers have many, many options, for all the business environmental reasons."

These fundamentals help everyone up and down the organization understand their work and set priorities correctly to get it done. When obstacles and conflicts arise, mission, urgency and customer-focus create a clearer path to resolution. These fundamentals help everyone up and down the organization understand their work and set priorities correctly to get it done.

CLEAR MISSION

Another important success factor in Agile adoption is a clear mission—it gives people a shared understanding of the North Star at all levels. According to one CMO, "It helps at the strategic level—pulling together a unified team mission—and it helps at the tactical level in terms of knowing what to change day-to-day based on this mission."

FROM ALWAYS-ON TO ALWAYS-AGILE

In today's always-on, always-connected market, CMOs have an unprecedented need for speed and flexibility and The Agile Advantage gets them there. The CMOs who figure Agile out first and best are leading their companies to gain market share and more.

NEXT STEPS

The marketing leaders featured in this paper already benefit from The Agile Advantage. They're transforming cultures, gaining competitive advantage, getting to market faster, and delighting their customers and employees today—what about you? Is it time to embrace change? And get the benefits you and your marketing organization deserve?

DIG DEEPER INTO THE AGILE MINDSET

Checkout our companion report—[The Agile Mindset](#)—for more on the *Seven Principles of Agility* and examples from CMOs who are using change-oriented leadership and shared cultural values to stay ahead of the market.

ACKNOWLEDGEMENTS

ABOUT THE RESEARCH

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ABOUT CMG PARTNERS

The first consultancy of its kind, CMG Partners was founded on a simple truth: strategic marketing is essential to business growth. Nearly sixteen years later, our firm remains at the forefront of its field, providing services that drive demand, engage customers, optimize marketing organizations, build brands, and more.

Highly sought-after by lead marketers, we help our clients—a cross-section of well-known FORTUNE 1,000s, budding middle-market corporations and start-ups—create and sustain top-line growth. At CMG Partners, we eat, sleep and breathe strategic marketing. Our people are smart, experienced, and driven by results, approaching each client challenge as if it were their own.

With nearly 50 consultants nationwide, we are a Durham, North Carolina-based company, privately held since 1998.

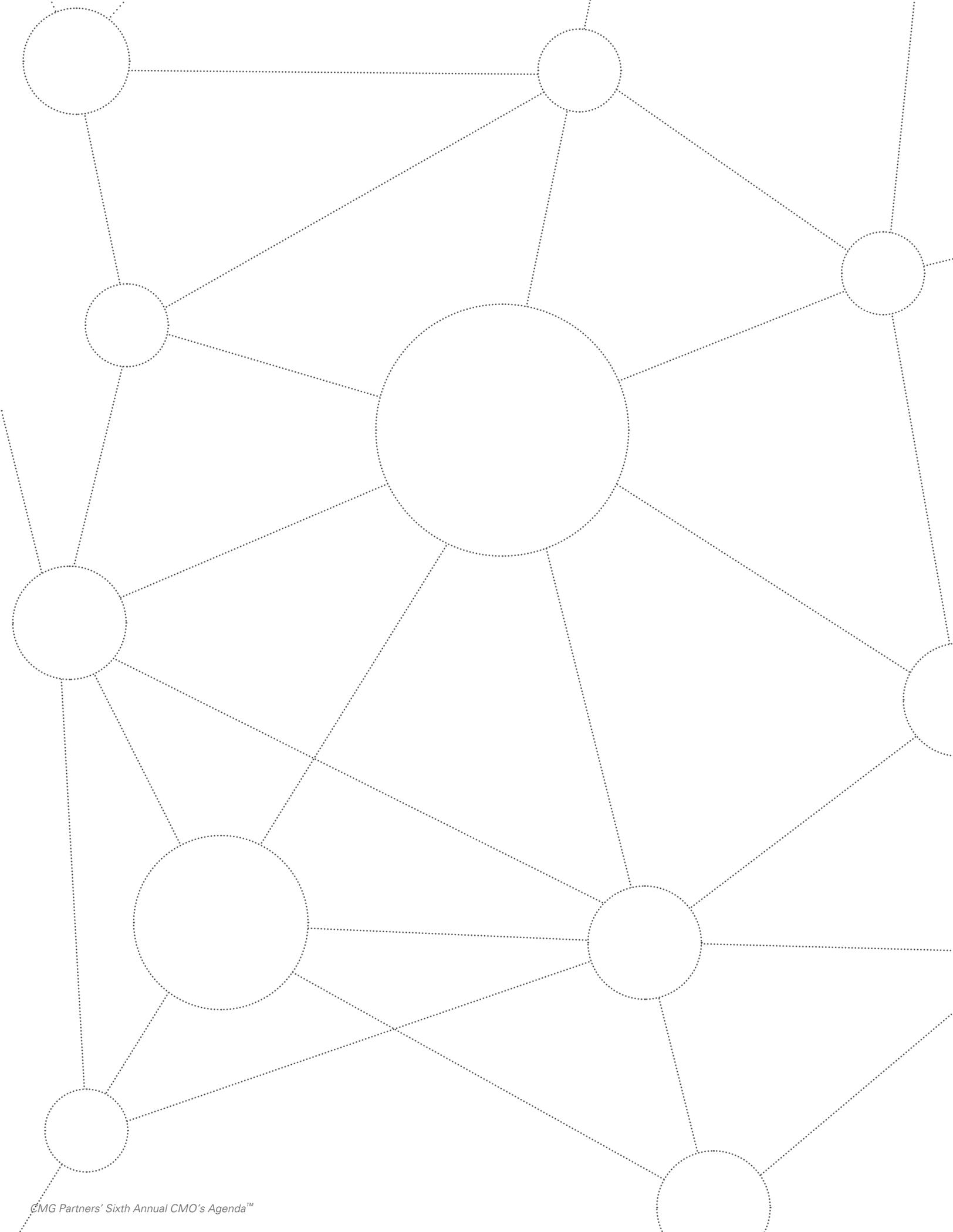
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To learn more about our team and our work, please visit www.cmgpartners.com.

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