

The New Era of

AGILITY

in Marketing

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Table of Contents

The New Era of Agility in Marketing

A Case of Acute Disruption 3

Part One: The K-Shape of Economic Recovery

A Tale of Two Recoveries 5

Determining the Shape of Recovery Through Agile Strategy 6

Part Two: Why Agile?

Building a Strategy That Fosters Adaptation 8

The Ingredients of an Agile Approach: The 4 Ps 9

Agility in Action 10

Part 3: How to Adopt an Agile Marketing Strategy

Top-Team Aspiration 13

Establishing the Blueprint 13

Agile Marketing Pilot 14

Adoption and Scale 14

Part Four: Transforming Your Organization: Agile Change Management

Transforming Your Leadership Style 16

Transforming The Team 16

Transforming The Organization 17

Conclusion: Follow Through on Plans but Be Flexible 19

The New Era of Agility in Marketing

The events of 2020 have left many marketers searching for answers amid a year that feels like never-ending tumult. Societal, cultural, political, and economic turmoil has forced even the best-prepared brands to scrap plans, and quickly pivot to meet the changing demands.

A Case of Acute Disruption

Digital transformation experts at Deloitte have identified this critical period as acute disruption, part of a larger trend of chronic disruption. That is, while businesses have felt stress to quickly adapt to the current increase in digital consumption, this has been a prescient warning to the laggards of the need for enhanced digital adoption and a more flexible project management framework, particularly within the realm of marketing.

In the 2019 book *The Technology Fallacy*, Deloitte researchers—in partnership with the *MIT Sloan Management Review*—found a strong correlation between digitally mature companies and the ability of their cross-functional team organization, processes and structures to encourage this adoption. Less digitally mature companies were more likely to have barriers in the form of organization, processes and structure.

One such organizational framework that has gained recent steam is Agile. This framework emphasizes the value of iterating quickly and focusing on value-based outcomes. Traditionally used in a technical development context, agile framework has now been applied to similar project-based functions such as marketing.

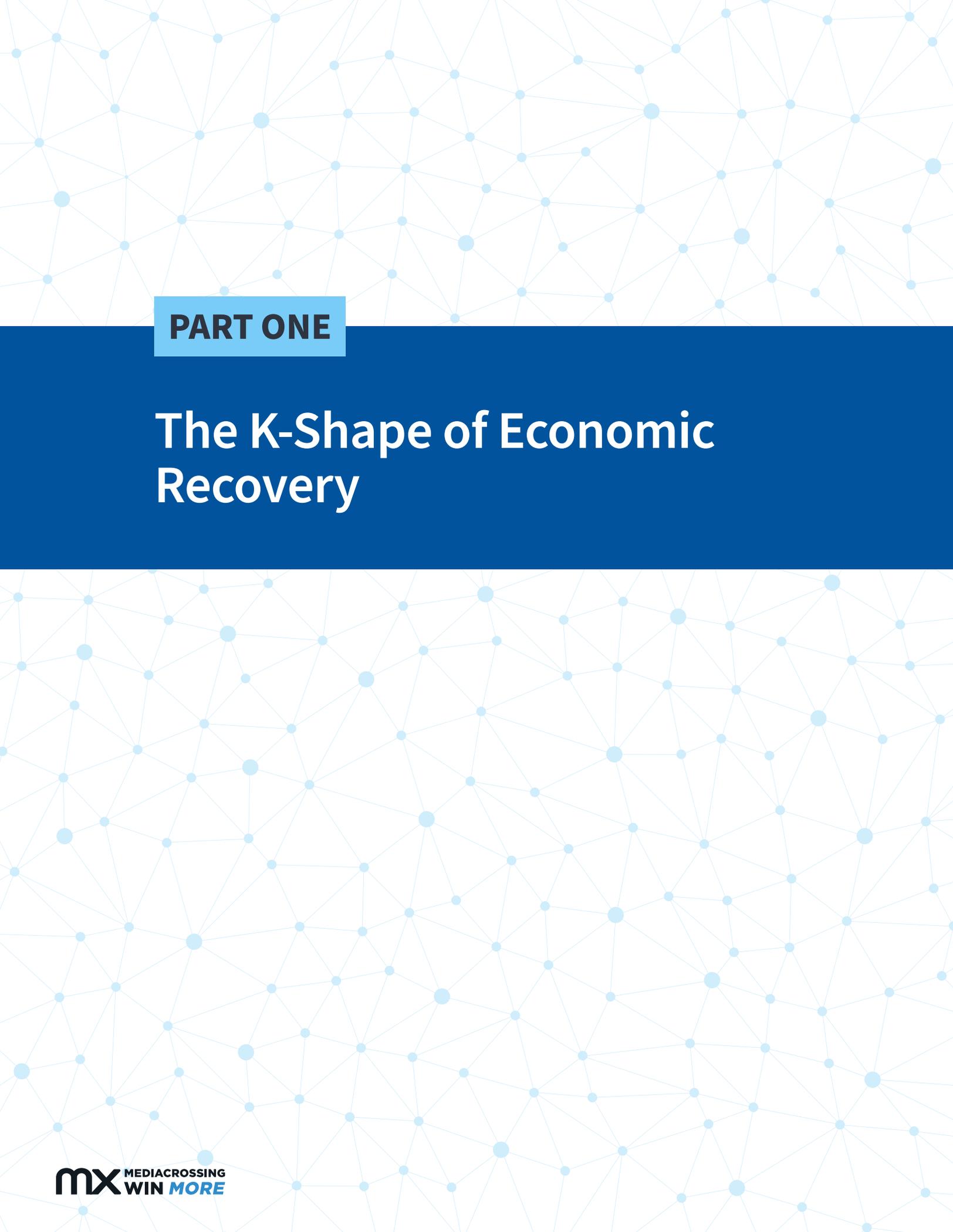
Agile applied to a marketing context is defined as:

“Using data and analytics to continuously source promising opportunities or solutions to problems in real time, deploying tests quickly, evaluating the results, and rapidly iterating.”

– McKinsey, 2016

Adopting an agile marketing framework will not only better position your organization to meet the demands of an acute disruption, but also address the long-term chronic disruption that is punctuated by points of stress. In this resource, you will learn how applying an agile framework to marketing can help you:

- Stay relevant through the acute disruption and ultimately better prepared for the long-term chronic disruption
- Adapt your strategy to position your organization at the top of a K-shaped recovery
- Create a more efficient workflow poised for success

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PART ONE

The K-Shape of Economic Recovery

The K-Shape of Economic Recovery

A Tale of Two Recoveries

The recovery from the acute disruption of COVID-19 on international business—and all its ripple effects—will be uneven. We can expect what economists call a K-shaped recovery, which is a separate trajectory for two segments. This splintering is simply enhancing the trend lines that have formed during the chronic disruptions of the last decade.

The Bottom of the K

The bottom of the K includes brands facing challenges due to structures in place that outlast the acute disruption of the pandemic. These companies at the bottom did not have the existing framework necessary to pivot and innovate to keep up with consumer behavior in response to change. While this sector includes the “unlucky” few (hospitality companies, travel companies and restaurants), these companies still have potential to bounce back after the stay-at-home economic disruption subsides.



Some brands have been faced with real challenges, making it tough to adapt.



The Top of the K

The top of the K represents well-capitalized businesses with digitally capable infrastructures. These businesses also have a natural alignment towards current trends. Some of these we refer to as “crystal ball” businesses that were ideally suited for 2020 in comparison to the “unlucky” camp at the bottom of the K. Brands that have a culture of innovation, and a pre-existing flexible backbone such as Zoom, DocuSign, Roku, Netflix, TikTok, and PayPal have seen success in response to this disruption.



Other brands – “Crystal Ball Businesses” – were ideally suited for 2020, not needing to adapt drastically (if at all).



Determining the Shape of Organizational Recovery Through Agile Strategy

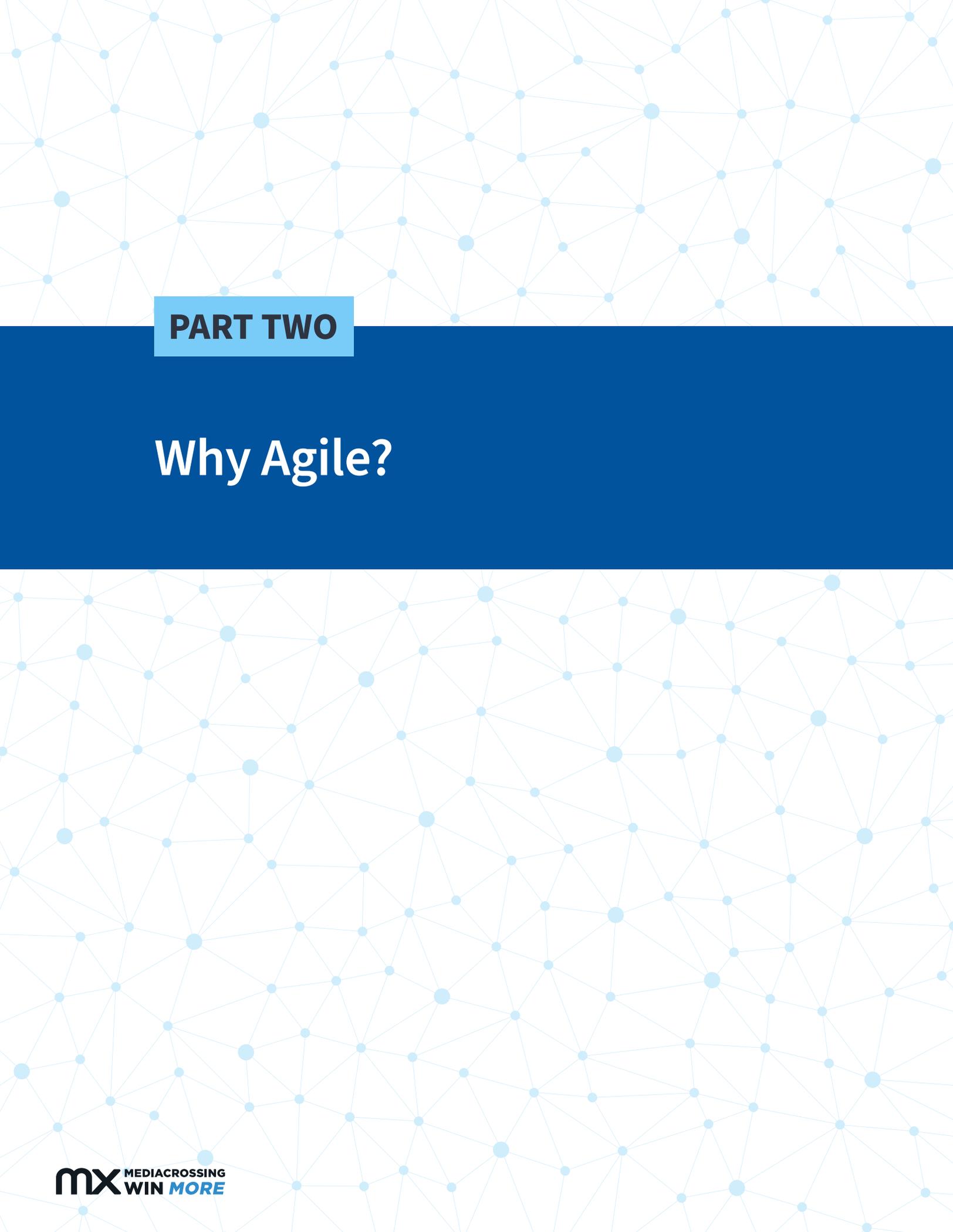
There is another type of company that is increasingly moving towards the top of the K-shaped recovery figure: those that have the structures in place to pivot and adapt to remain category leaders in industries that have had ambiguous and varied responses to disruption.

These are largely brands that had to pivot strategy quickly and adeptly, marketing towards both the current state of their audiences, as well as planning for the unpredictable nature of the future. While the “retail apocalypse” is [considered to have been underway since at least 2015](#), the pandemic disruption has accelerated the death blow, or in this case bankruptcy, [for many traditional retailers](#).

With the threat of extinction leveled up a notch, differentiators—adept, agile innovators—have been able to remain relevant to the consumer. For example, traditional retailer Gap pivoted to producing face masks, [yielding over \\$130 million in sales](#) from the move. [L’Oreal ramped up digital ad spend](#) and provided one-on-one video consultations to grow their ecommerce business. MasterCard [introduced virtual experiences for its cardmembers](#). The ability to pivot successfully hinges upon your strategic and organizational structure. An agile marketing strategy will increase a brand’s ability to shift priorities, address changes in the marketplace, and be better prepared for an unpredictable future.

“In this new world, it is not the big fish which eats the small fish, it’s the fast fish which eats the slow fish.”

– Klaus Schwab, Founder and Executive Chairman,
World Economic Forum

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PART TWO

Why Agile?

Why Agile?

Building a Strategy that Fosters Adaptation

The K-shaped recovery model demonstrates that imperative brands are nimble, with a strong backbone in order to develop and execute innovative strategies.

The agile marketing framework will enable brand marketers and senior leadership to ensure success by creating the system to support innovation. Agile marketing framework provides brands with the following core benefits:

Speed To Outcomes

Speed to target outcomes is incredibly powerful. Analysis paralysis is something that slows down organizations, especially during times of turmoil. Being agile allows you to optimize towards outcomes in real-time, shortening the customer's path-to-purchase and your path to revenue.

Testing + Learning

The most important thing that any organization can do is determine an internal testing and learning strategy to unlock new audiences, revenue opportunities, and channels for growth.

Actionable Insights

Agile companies use data to make informed business decisions. They use actionable insights to guide their thinking, create a baseline, and figure out what works and what doesn't based on data.

Measuring Performance + Optimizing

Agile companies take these learnings and insights to scale performance. With the data-driven and iterative approach of agile marketing strategy, performance can be refined in a more timely and precise manner compared with traditional marketing planning.

Focused Teams

By testing and learning, fear of failure gets replaced by a fear of not learning and not adapting. Individual team members, from the operations executors to the strategic decision makers, play a role in determining value-based outcomes for the organization. Agile marketing strategy encourages stakeholder buy-in and individual responsibility for each participant.

The Marketer's Dilemma

Reduced budgets across the marketing world require scrappy, high-energy, cross-functional teams composed of subject matter experts. Still, these teams need to be challenged to come up with the best new ideas to help businesses grow efficiently.

Rapid cycles require change and an iterative approach. CEOs can't do this alone. Teams can't do this alone without CEOs and other leaders helping push this process through. This acute disruption has made evident the need for marketing executives and teams to re-analyze processes to ensure the marketing playbook is built for success in the New Era of Agility in Marketing.

The Ingredients of an Agile Approach: The 4 Ps

These building blocks, necessary for companies to survive the chronic disruption across industry, are founded upon the Principle of the 4 Ps: People, Plan, Process, and Performance.

People: Well-defined roles and well-defined goals

When building agile teams, it's crucial to establish well-defined roles and well-defined goals, which will foster collaboration. Consider organizing your process around the context of a RACI Matrix provided below.

RACI stands for **Responsible, Accountable, Consulted, Informed**. Each letter in the acronym represents a level of task responsibility.

	Definition	# of Team Members
RESPONSIBLE	Executing the work to complete the task at hand	At least 1 member per task
ACCOUNTABLE	Delegates work and is the review step before work is considered accepted	Limit to only 1 accountable member per task
CONSULTED	Provides input on the project and has strategic oversight into the task at hand	No max or minimum
INFORMED	Needs to be kept up to date on progress of the task or project, but not necessarily detailed versions	No max or minimum

[Click Here to Access a Sample RACI Matrix Planning Template for Excel](#)

The collaborative nature of agile teams extends outside the enterprise as well, to external partners. That could be clients, or people that are working remotely on your behalf, but they all understand the goals. In doing this, agile teams unlock the power of quick, well-coordinated movement.

Plan: Never lose sight of the outcome

Agile marketing strategy is based on the idea of innovation and refinement. Your marketing plan should be outcome-focused, and directionally based. Your process-driven background will enable the plan to shift towards outcomes through constant reviews, collaboration, and iteration.

Agile marketing systems focus on smaller experiments that can be replicated on a larger scale. Organizational transformation starts first with a test (explored below), and extrapolated to a larger plan.

Process: The backbone for driving outcomes at high speed

While the current acute disruption is providing a wake-up call for companies lagging behind, the chronic disruption of digital innovation will continue to last in the foreseeable future. Therefore, every business and its marketing department needs an organizational foundation and a process in place to support change. The agile marketing strategy provides a defined process that establishes stability and efficiency across an enterprise.

Process facilitates agile teams and wider planning, allowing them to act nimbly. Defined process enables an organization to enact flexible changes with speed and precision. This is an essential differentiator for outlasting competitors within your respective industry.

Platform: The technological backbone

Marketing departments have thousands of platforms and technology partners to choose from. Technology should be used as a tool to facilitate the interactions of the agile marketing department.

For most organizations, the outcome is finding new customers and growing sales at scale, or introducing new products to existing customers. Agencies can serve as an outsourced guide to choosing the most effective and relevant platforms for achieving these outcomes.

Agility in Action

Getting agile marketing right requires marketing departments to understand the value of collaboration, partnership, team extension, strategy, planning, buying, optimizing, and measurement.

Those that are able to put agility into full action are focused on customer journeys, return on investment, measurement, and the test and learn methodology. They leverage custom and data-driven marketing to really understand who their customer is, the nature of that customer and how that customer is changing based on the current marketing ecosystem.

In the end, it comes down to accountability and transparency. Teams want to know what's working and what's not working, and they don't want to know a month later. They want to know in near real-time.

Agility in full action means teams have taken all of these variables and made somebody within an organization accountable to oversee teams that pull these things together.

Once again, it comes down to the 4 Ps.

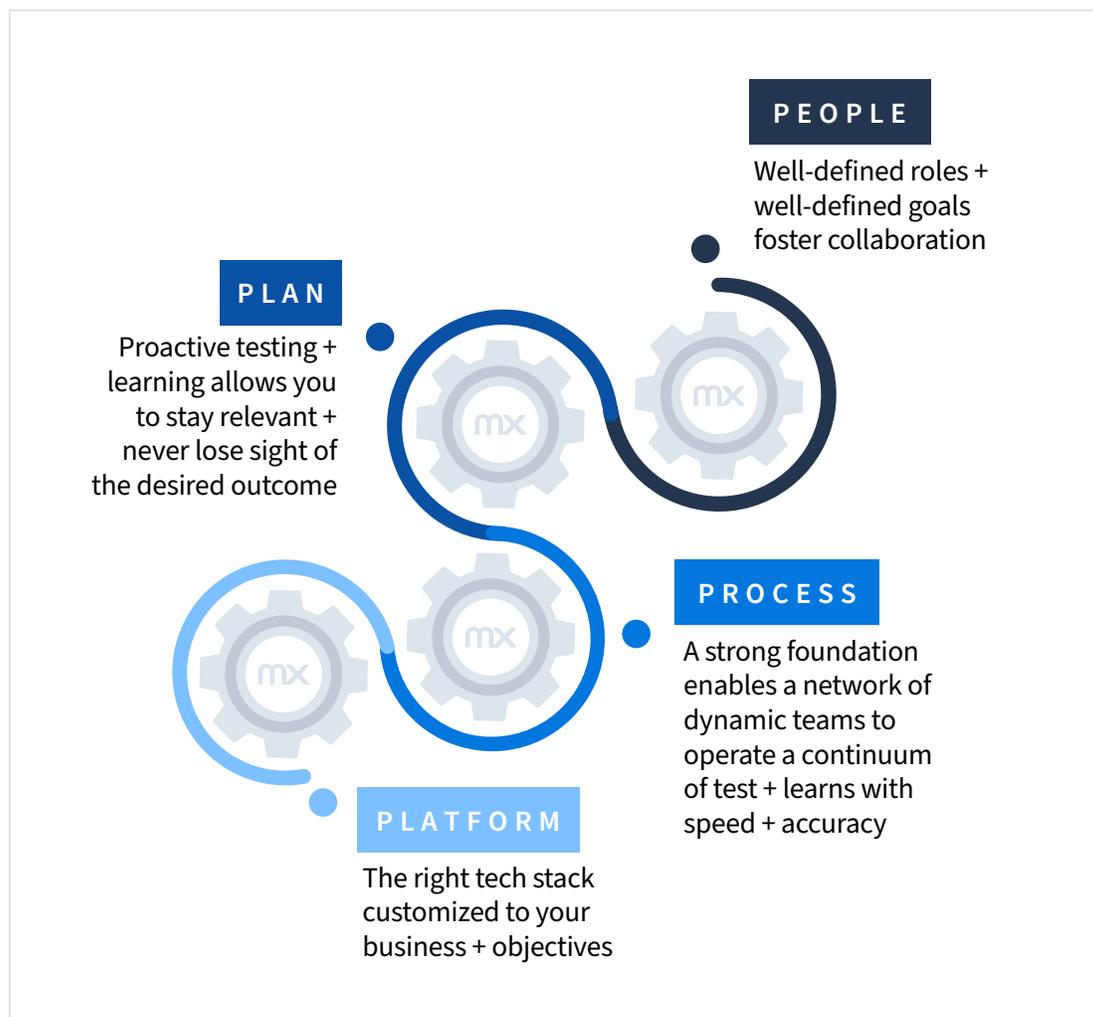
People with well-defined roles and well-defined goals that foster collaboration with internal and external teams will not only succeed, they'll flourish.

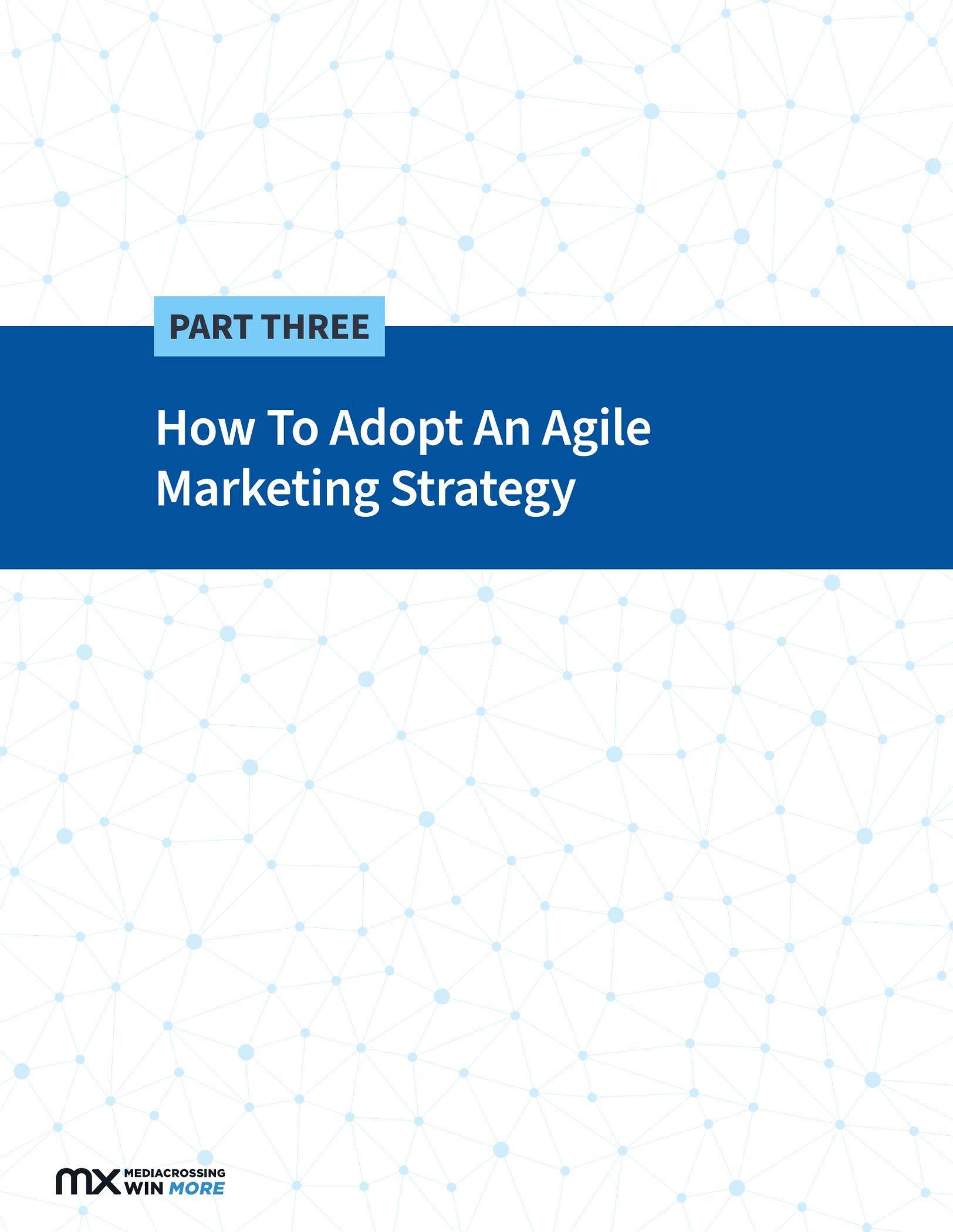
A **plan**, with a proactive testing and learning methodology, allows marketing teams to stay relevant, but not lose sight of that outcome. This is the beginning of an evergreen plan that helps businesses build one-to-one relationships with fickle customers that are transacting differently than how they once transacted.

Put a **process** in place, so that no matter what life throws at your organization, your team is set up to go out and win new business and figure out the quickest way to results.

Finally, take the complexity out of the **platforms** that are available. Find the platforms that work. People are the lead, not the platforms, so put the right customized platform technology stack in place to reach your business objectives.

Start with people, come up with a plan, build a process and lean on the right platforms. The 4 Ps, when done correctly, help businesses adopt agile marketing, and generate outsized outcomes.



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PART THREE

How To Adopt An Agile Marketing Strategy

How To Adopt An Agile Marketing Strategy

An organization—or departmental—wide agile transformation needs to be comprehensive, goal-oriented and structured in such a way that it is conducive to scale. Successful organizations [pivot to agile by following the formula: aspire, design and pilot](#).

“I’d never have launched this agile transformation if I only wanted to remove pain points; we’re doing this because we need to fundamentally transform the company to compete in the future.”

One CEO [shared with McKinsey researchers](#) the above on the benefits of agile transformation. The same researchers found that transformations emphasizing both success and challenges were three times more likely to succeed, compared with just focusing on challenges.

Top-Team Aspiration

Analyze your current organization’s state and the potential for an agile marketing framework by establishing the following:

- Assess the current state of the organization internally
- Assess the state of the organization externally, with regards to competition and changing political, economic, social and technological developments
- Share the vision of the agile transformation for your department stakeholders across functionality: from C-suite leadership to operational teams
- Align on expected outcomes of the transformation

Establishing the Blueprint

The blueprint for an agile marketing strategy requires establishing a clear vision or roadmap that sets up the backbone processes for an efficient, iterative environment. Your blueprinting step should be grounded in an understanding of value, as identified in the top-team aspiration.

- Outline the scope, schedule, and complexity.
- Identify key stakeholders and how each team will work with one another.
- Document the needs of each audience, campaign or initiative.
- Estimate key milestones and timelines.
- Map resources to the sprint plan: Traditional agile strategy operates using a [Kanban](#) or [Scrum](#) project management system.
- Document how change impacts will be determined sprint by sprint.
- Identify key performance measures.
- Build feedback loops to gather and respond to stakeholder input.

Agile Marketing Pilot

The scope of the agile pilot should be defined based on practical needs of the team, related to a current or upcoming initiative, or to provide a solution for the organization. The pilot must be executed with respect to the four Ps: people, plan, process and platform. Identify the area to test the agile framework within your marketing department, and run an experiment using the above tactics.

The following are key components of an ideal pilot:

- An existing or upcoming project or idea within your marketing team
- The project should last a reasonable length of time (around 4-6 weeks) to enable weekly sprints and iterative changes
- Find a project that is representative of an average level of complexity
- Choose a project or initiative that can be translated to scale in other applications

For example, try an agile marketing approach to managing paid search marketing campaigns. This is an example of a specific piece of your advertising strategy that can translate to other areas of the business such as managing paid social advertising campaigns.

Adoption and Scale

The fourth piece of implementing an agile marketing strategy is to take the learnings from the experimental pilot, and translate those learnings across the marketing department. It is important to critically analyze the challenges and successes of the trial. Agile strategy lends itself to the idea of flexible implementation.

HR People + Strategy suggests that in change adoption and scale, “there may not be time to develop a fully realized communications plan as part of your change approach. In such a scenario, the best approach may be to **identify 70-80% of stakeholders** along with the minimal messaging needed to get across to them before rolling out a minimally viable solution – the Agile term for a deliverable.”

It's common for a structural or behavioral change such as this to get stuck in the pipeline. Managers may get inspired to try out the new system, launch a pilot, and stall when deciding it is the right time to scale. It is important to remember that there may be no defining moment when the time is right to launch, but without a flexible, adaptable framework for the future, your organization may fall to more agile competitors.

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PART FOUR

Transforming Your Organization: Agile Change Management

Transforming Your Organization: Agile Change Management

A 2017 global study of leaders found that transforming the culture and way of working was the number one challenge for organizations to have a successful agile transformation. Change management can be a difficult process, particularly when dealing with overhauling existing systems and behaviors.

“Culture is perhaps the most important element of this sort of change effort. We have spent an enormous amount of energy and leadership time trying to role model the sort of behavior—ownership, empowerment, customer centricity—that is appropriate in an agile culture.”

– Bart Schlatmann, previously Chief Operating Officer,
ING Netherlands (McKinsey)

The following techniques outline the ways senior leadership can transform themselves, their teams, and the greater organization to be conducive to successful agile strategy:

Transforming Your Leadership Style

Use the following principles to guide your leadership style to foster innovation over top-down management style. Leaders must shift to a mindset of proactive discovery, rather than reactive structure, to adapt to the changing market environment. The following five practices are principles of centered leadership for fostering a discovery mindset:

- **Pause to move faster.** Although counterintuitive, pausing can create space for clear judgment, original thinking, and purposeful action.
- **Embrace your ignorance.** Listening—and thinking—from a place of not knowing is essential for original, unexpected, breakthrough ideas.
- **Radically reframe the questions.** Change the nature of the questions we ask ourselves to unblock your existing mental model.
- **Set direction, not destination.** In unknowable environments, instead of moving to a fixed goal, join your team on a journey with clear direction.
- **Test your solutions—and yourself.** Quick, cheap experiments can avert major, costly disasters for your business and for you. Thinking of yourself as a living laboratory constantly testing innovative ways of leading makes it exciting, not terrifying.

The above tactics will enable you to lead your team in change management toward an agile future. Your leadership style should incorporate the following principles:

*Learn more by asking more questions than sharing your opinions with your team.
Listen deeply, and focus on areas that you might be missing during the initial briefing.
Create space to pause and reflect.*

Transforming The Team

To successfully transform your marketing organization into one that operates with an agile framework, you must be servant-leader, focused on encouraging ownership across your team. From management through associate level employees, your teams should have a sense of ownership and understanding of this change. Use the following principles:

- **Help teams work in new ways.** When building new teams, provide an environment that encourages multidisciplinary interactions and “monodisciplinary” teams to work together to drive results and meet goals identified by senior members.
- **Encourage efficiency and focus on value.** Leaders must help teams focus on important and urgent tasks through rigorous prioritization (creating a backlog). This cuts the friction inherent in multitasking.
- **Align focus on the customer.** You must help their teams focus on creating innovative, whole solutions for customers, recognizing that the value that flows to all other stakeholders starts with value for customers.
- **Create Ownership Value.** Each team in the marketing system should be considered its own value-creating unit on behalf of the larger business. Encourage ownership of tasks within the value-creating unit, encouraging accountability.

Transforming The Organization

Taking a macro look at the larger organization, leaders must ensure the infrastructure is in place to launch a successful agile marketing strategy. The following principles can be used as a guide to enable this transformation:

- Supporting the lean, enabling backbone. The core of agile is the lean backbone of processes that can support the value-creating units executing the agreed-upon tasks in the design of the initial agile experiment or pilot.
- Developing a partner ecosystem. Leaders should not be designing or executing all pieces of an agile ecosystem, rather, they should rely on agency partners and value-creating units for implementation. The leaders should be responsible for constructing the high-level blueprint, and guiding these partners in their approach.

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- Encourage the culture of discovery. Culture is identified as the number one challenge against transforming an organization to agile strategy. Encourage the culture of openness and discovery by role-modeling behaviors as a senior leader and providing the tools and environment necessary for stakeholders to succeed.
- Consider the [Four Influence Levers](#) when driving change:



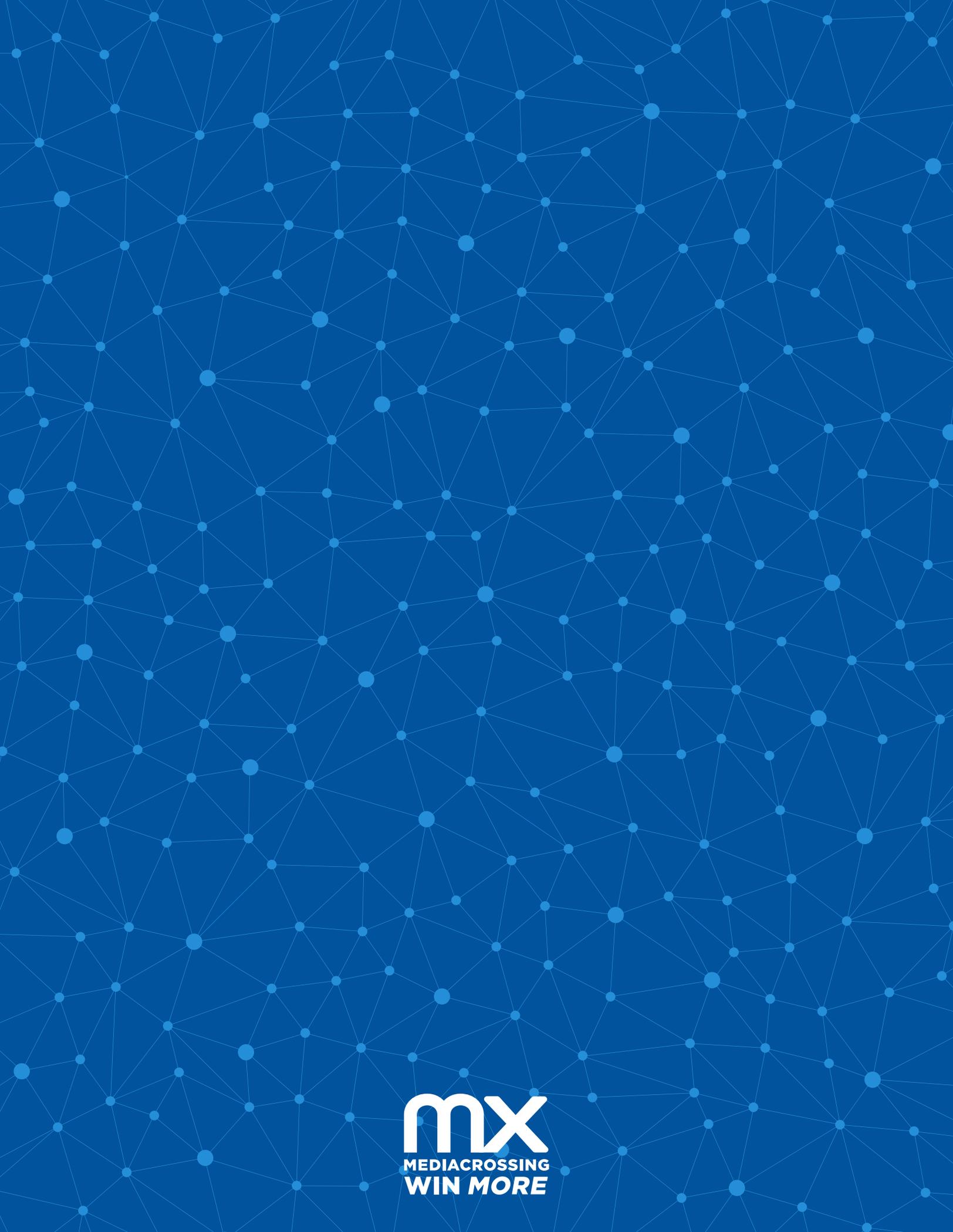
Source: Scott Keller and Colin Price, “Performance and Health: An Evidence-Based Approach to Transforming Your Organization,” 2010.

Follow Through on Plans but Be Flexible

Implementing a new marketing strategy, while overhauling your existing systems may seem overwhelming to leadership looking to keep their heads above water as the digital transformation continues to disrupt industry.

Leaders may have their interest piqued, run experiments, and ultimately return to 'normal' in an attempt to avert unnecessary risk during uncertain times. In order to encourage change, leaders must power through the uncomfortable processes by following strategies and templates for change. Follow the above principles, but remain flexible in execution. The next 5-10 years will crystallize the agile, adaptable brands from those that will fail to meet the changing marketplace.

For more information on Agile Marketing and digital strategy, visit www.mediacrossing.com or email info@mediacrossing.com.



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