Mighty Guides

10 MARKETING
EXPERTS SHARE VALUABLE
TEAM HACKS

How to be a Smarter, Faster, and
More Innovative Marketer

SMARTER

FASTER

MORE INNOVATIVE

Technology has transformed the way marketing works, and that is an indisputable fact. Adapting to this change is an obvious necessity for most marketing organizations. The real question facing marketers today is, am I keeping up?

Marketing has grown from a cost center to a value creator in the modern enterprise. Marketers must perform in the face of markets that evolve faster than business strategy and consumers who know what they want and expect you to know it too. All this is aided and abetted by a system of tools, platforms, and data used by marketers and their customers, a technology base that seems to change almost daily.

How do real-world marketers thrive in this dynamic and demanding business environment? We decided to find out. With the generous support of Workfront, we posed the following question to 10 highly successful modern marketers:

What advice would you offer a newly promoted director of marketing who needs to transform an old school marketing team into a highly productive and value-producing team?

From our conversations with the experts, we put together 10 essays that offer several practical strategies for working smarter and faster and being more innovative. Whether it's about becoming a more data-driven marketing organization or collaborating more effectively inside the enterprise, these essays offer tips from in the trenches about many strategic challenges modern marketers face every day.

As someone who spends a lot of time in marketing activities, I found these essays to be a refreshing take on some of the big marketing questions we face today. I hope you agree.

All the best,
David Rogelberg
Publisher

Mighty Guides

Mighty Guides make you stronger.
These authoritative and diverse guides provide a full view of a topic. They help you explore, compare, and contrast a variety of viewpoints so that you can determine what will work best for you. Reading a Mighty Guide is kind of like having your own team of experts. Each heartfelt and sincere piece of advice in this guide sits right next to the contributor's name, biography, and links so that you can learn more about their work. This background information gives you the proper context for each expert's independent perspective.

Credible advice from top experts helps you make strong decisions. Strong decisions make you mighty.

FOREWORD

Today's marketing teams must move faster, act smarter, and be more innovative in a market that's crammed with competition like never before. To consistently deliver ground-breaking content and campaigns, a great idea and a handful of late nights at the office are no longer enough. You have to understand the way marketing work flows. It's about the entire work life cycle—from the initial idea to the publication of an asset to the final report—and how we optimize that life cycle to deliver stellar results that are predictable and repeatable.

How do we get better? We learn from other marketers in the field. That's why we've partnered with Mighty Guides to bring you 10 marketing experts with 10 marketing hacks you can implement today. In this e-book, each contributor offers you advice on how to transform your department into a highly productive, value-producing team.

Read on to learn tips about better launches, getting a handle on the dreaded feedback loop, justifying new hires, fueling the marketing creativity fire, and so much more.

Regards,
Joe Staples
CMO, Workfront

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BRANDON PIERSANT

Senior Director of Marketing
DealerSocket

Brandon Piersant is the senior director of marketing at DealerSocket, a leading automotive technology platform that drives profitability for dealerships in the United States, Canada, and Australia. Brandon has more than 17 years of marketing experience and ran his own creative agency servicing Fortune 500 technology companies before his nine-year tenure at DealerSocket.

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The project launch phase provides one of the best opportunities to maximize a marketing team's productivity when you are in the earliest stages of working on a marketing requirement. For Brandon Piersant, senior director of marketing at DealerSocket, one of the main goals of the project launch phase is smarter alignment of all resources needed to bring the project to market. "When we launch a project," says Piersant, "I have all my team leaders come together to discuss the market data available to us, as well as the resource alignment."

Of all the project launch activities, alignment is critical for maintaining a high level of productivity. At any given time, Piersant's marketing organization has 60 active projects in its project management tool. About 70 percent of these fall under major campaigns that have formal project launches. The other 30 percent are smaller projects that don't have formal launches, but they still require objectives and schedules. When 60 active projects are in the works, it is critical that the work getting done is the right work, which for Piersant's team is work that delivers the expected return on invested resources. Equally important is that this work is leveraged into the market as efficiently as possible.

KEY LESSONS

1 At project launch, you should align all the resources you need to most efficiently execute and deliver the work that will return the expected return on investment.

2 My marketing team hack is leveraging enthusiastic organizational buy-in, which gives you a built-in audience for testing assets and messages.

> *When we launch a project, I have all my team leaders come together to discuss the market data available to us, as well as the resource alignment.*

To ensure greatest productivity, Piersant uses the alignment process to identify and commit all the resources needed to efficiently execute and deliver. This process includes the following key elements:

• **Identifying who will be responsible** for specific creative and operational tasks within the different parts of the marketing team (product marketing, demand generation, and marketing operations)

• **Defining how to align** with any outside agencies working on the project

• **Obtaining buy-in** throughout the organization, including sales, product development, strategic services, and technical support

"The reason organizational buy-in is so important early in the project is that internal colleagues, especially product engineers, can be your harshest critics," says Piersant. "We do internal pilots. Launching internally first gives us a really good idea if an asset is working." Identifying what is not working as early as possible is the hallmark of a highly productive marketing team. Piersant specifies that with digital campaigns, if your message is not resonating within 72 hours, you need to make changes. Leveraging enthusiastic organizational buy-in gives you a built-in audience for testing assets and messages.

Another reason for smart organizational alignment is "the internal people who buy into your project also have the best connections to your target market." For example, if Piersant's team can get product engineers, sales people, and strategic services people interested and excited about a marketing project, the campaign can go much further because these people are all involved with the target demographic.

> "
> *We do internal pilots. Launching internally first gives us a really good idea if an asset is working.*
> "

Disseminating marketing assets and messages through personal contacts in the marketplace is far more effective than a mass communication from the marketing department. "We often create assets specifically for our colleagues to send to their contacts as part of our campaign," says Piersant.

These strategies, which enable marketing teams to deliver measurable results faster and more efficiently, depend on effective organizational alignment at project launch. That is not always easy, because groups are busy with their primary commitments. Piersant says, "We have to be very tactical about how we align with different groups in the organization, especially product engineering." The result, however, is that Piersant's team is able to fulfill marketing requirements faster and more efficiently.

PAUL MALICKI

Global CMO
Easy Taxi

Paul Malicki leads marketing strategy and new business development at Easy Taxi—Latin America's largest urban mobility app. He is the person behind some of the company's biggest deals, including WeChat and Moovit. Before joining Easy Taxi, he was involved in numerous start-up projects in the Philippines, Taiwan, Sweden, and Poland. As a CMO, he believes in big data and strategic alliances. He is soon to publish his first book on mobile marketing, titled *Chief Mobile Officer. The Guide to Growth.*

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Paul Malicki believes that learning requires a willingness to try and evaluate new techniques. For newly promoted marketing directors, he advises that "It starts with the culture: experimenting, measuring, and being data driven. To stick, it has to be formalized into the company culture."

You can approach this a couple of ways. "At my company, EasyTaxi, we put it as one of our 10 core values," he says. "There's always a point on the wall where staff can see that measuring and pivoting and testing is a part of the way we want to approach the market." As a result, it's well understood that you don't pursue an initiative or a project at the company until you have compelling data supporting your case.

A marketing team can only truly adopt a culture of measurement and analysis if an infrastructure exists to support it, however. Any marketing unit needs to equip itself with a variety of marketing tools to do its work effectively, and it will need to test those tools to understand how well they perform. "Eventually you will have to create your own data warehouse where you can store all the internal data that is universal to the company," he explains.

KEY LESSONS

1 Marketing directors should focus on company culture as well as digital infrastructure when learning to experiment and measure.

2 Measurement and analysis are becoming even more essential for marketing teams to predict their customers' future needs and remain competitive.

> *It starts with the culture: experimenting, measuring, and being data driven. To stick, it has to be formalized into the company culture.*

Once you have that, you will be able to segment your data and make it available according to the different needs of your staff.

After the right infrastructure is in place, every new idea that your team tries should be based on data. "You don't make a decision until you have the data to support it," Malicki explains. "And once you've completed a piece of work, you must evaluate it at that point too. There has to be some sort of data set that confirms that the decision you took was the right one. You have to limit things that don't work and scale those that work, and it's as simple as that."

Clear and consistent leadership is essential to creating and sustaining a culture of measurement and analysis, according to Malicki. "You have to nurture it. It's a lot about leadership because at the end of the day, if you don't remind people that this is important and if you don't envision the data-driven culture, it becomes more and more difficult for your employees and team members to adopt it and to nurture it as well," he says.

Malicki's ultimate marketing hack is this: using learning and measurement to discover future products and services to offer your users. "You can't just create things that are great or things that are simply on par with your competitors," he says. "You need to find out the next thing that they're going to enjoy. Measuring and experimenting is not a thing of the past anymore. It's how you predict the future."

> " *Measuring and experimenting is not a thing of the past anymore. It's how you predict the future.* "

ANASTASIA PAVLOVA

Senior Director of Marketing
Marketo

Anastasia Pavlova leads the North American demand generation team at Marketo driving integrated marketing programs across the entire customer lifecycle—from new customer acquisition, to retention and cross-sell. She has over 15 years of experience in marketing strategy, technology product marketing, and marketing programs across SaaS, computer software, and consumer products industries. Anastasia earned an MBA from the Haas School of Business, UC Berkeley.

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The world in which we market products, services, brands, and ideas has been totally transformed by digital technology. Today, we have more empowered and connected consumers who are in control more than ever before. And, they're driving change in how they want to engage with brands and companies. One impact of this transformation has created a problem and an opportunity for both consumers and marketers. As Anastasia Pavlova, director of marketing at Marketo, points out, "According to Forrester research 66 – 90 percent of the buyer journey is self-directed before they interact with your company or brand. Consumers are bombarded with 3,000 marketing messages every day. 87 percent of them have smartphones at their side night and day. They check phone messages 150 times a day, and 88 percent of them trust online reviews as much as personal recommendations. It's becoming difficult for marketers to break through this noise." In order to be heard, marketing is now, more than ever, responsible for communicating with the customer throughout their journey with relevant, personalized messages. To do that effectively, marketing teams must reshape themselves into centers of excellence that look across the entire customer experience.

KEY LESSONS

1 Horizontal marketing teams need to be serviced by horizontal centers of excellence, such as demand gen, content marketing, and marketing operations.

2 The ideal marketer for cross-channel, customer-centric marketing combines the creativity of artists with analytical and data modeling skills.

> *The centers of excellence have skill sets to serve horizontal marketing teams with customer-centric content or programs throughout the customer life cycle.*

Traditionally, marketing organizations have been structured around channels. There would be a team focused entirely on retail, and another team focused on advertising, where part of the team would do print ads and another team would do digital ads. A separate team would be responsible for social channels and yet another team would handle mobile and social. As technology-driven channels proliferated, companies would hire more channel specialists. "All this channel structure translates into highly silos programs and communications that deliver disjointed messages," Pavlova says. "Channel-based silos are not effective in this digital age where the customer journey is fluid across these channels and consumers expect seamless conversation and seamless experience from channel to channel," says Pavlova.

There are several things a highly structured, channel-bound enterprise can do to break down its siloed marketing operations:

• **Establish cross-channel marketing teams and centers of excellence that focus on the entire customer experience.** "Marketing needs to put their customers first and think about their needs and experience, rather than looking inward to how the organization has been structured historically," Pavlova says. This means building marketing teams that cut horizontally across the entire customer lifecycle. For example, teams responsible for advertising, product marketing, demand generation, and customer marketing can all be set up to cover the customer journey experience from early awareness, to engaging prospects and customers across different channels, to retention and brand advocacy. These horizontal marketing teams need to be serviced by horizontal centers of excellence, such as content marketing and marketing operations. "The centers of excellence have skill sets to serve horizontal marketing teams with customer-centric content or programs throughout the customer life cycle," says Pavlova.

> " *I need people who have a breadth of skills, who understand the customer, and who can envision and execute programs across all digital channels, move nimbly and span multiple modalities.* "

• **Build teams of passionate generalists, not specialists.** "I can no longer afford to hire people with only one skill or narrow specialization, like email or social, I need people who have a breadth of skills, who understand the customer, and who can envision and execute programs across all digital channels, move nimbly and span multiple modalities," says Pavlova. The ideal marketer for cross-channel, customer-centric marketing combines the creativity of artists with analytical and data modeling skills. They need to be doers as well as 'feelers' who understand customer behavior, expectations, interactions, and have a pulse on the customer at any given point of the customer lifecycle. They also need to be great collaborators. "It's different than a traditional siloed environment," explains Pavlova. "People come together from different cross-functional teams to solve a problem. They solve it, and then move on. A different team with different skills will come together to solve a different problem."

The result of this horizontal, customer-centric marketing organization is the ability to respond more quickly and in a more coordinated way to the customer needs that is provided by modern digital marketing tools. That means more responsive and efficient marketing. "You no longer have those silos, inefficiencies, and duplicate efforts happening throughout the organization. And moreover, you'll be able to do better marketing, that is more relevant and personalized, taking into account your customer needs." says Pavlova.

LIZ AUSTIN

Senior Marketing Director
McGraw-Hill Education

Liz has more than 15 years of marketing experience across numerous sectors, with a focus on information platform, SaaS, and subscription products. She is currently the senior marketing director at McGraw-Hill Education, a learning science company, leading all aspects of marketing for the company's Professional group. Liz has supported the company's digital transition by leading a swift transformation of her team and building out new marketing capabilities across demand generation, content, digital, operations, and analysis.

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"In the past, marketing was given a budget and a lot of discretion about spending it," says Liz Austin, senior marketing director of McGraw-Hill Education. "Now, when someone gives you something, you have to give something specific in return." This change in attitude toward marketing expenditures is, in fact, the result of a growing expectation that marketing can prove the value of what it does. The only way to do this is through data, from making the case for budgets and resources to justifying their use at the operational level. "Those pieces are critically important in transforming a team. You have to rely on data as opposed to historical knowledge or opinion to drive your organization forward," Austin says.

To become a data-driven organization, knowing what data you need to measure your marketing activities is essential, and you must be able to capture and analyze that data. "You have to do some legwork and look at the foundational aspects of your marketing organization," says Austin. "One of the first things I did when I came on board was to get our platforms working together, hand-in-hand, so that we had a clean lead hand-off process and visibility into the revenue that marketing was generating on behalf of sales to help demonstrate our value to the organization."

> *You have to rely on data as opposed to historical knowledge or opinion to drive your organization forward.*

KEY LESSONS

1 Data makes the case for resources the marketing organization needs to contribute to overall business objectives.

2 Operationally, data becomes the driver for efficiently allocating the resources you have.

With that kind of visibility, you can make a data-based case for the resources you need. These are not just the resources you would like to have. They are resources the marketing organization needs to contribute to overall business objectives. "It's critical to work with your business partners so your resources align with their goals and you are in step with the rest of the business," Austin explains.

Operationally, data becomes the driver for efficiently allocating the resources you have. No one has unlimited budgets, which means smart choices must be made that will deliver the best return on those allocations. For instance, one of the great advantages of marketing automation platforms is data that provides insight into the efficiencies of different channels.

In the case of McGraw-Hill Education, they now have visibility into leads generated through all their marketing channels and handed to sales. They can see exactly what's in the pipeline and what leads are generating revenue. "In the past, we used to throw leads over, and we'd rely on anecdotal information from the sales team. Now we have clear, hard data that we can look at to make sure we're maximizing our marketing spend," says Austin. "That's been enlightening. With this visibility, we can see where we need to make adjustments to our channel strategy." Austin's team looks at which channels are driving the most revenue, and, based on that data, they can make decisions about spending more marketing dollars in those areas.

> " *It's critical to work with your business partners so your resources align with their goals and you are in step with the rest of the business.* "

Data becomes really important in finding the right programmatic mix between the thousands of products Austin's marketing efforts must support. "The programmatic piece is important for us," says Austin. "If something is not performing within that programmatic mix, we're going to replace it with something else."

To become a data-driven organization, people at all levels must become uncomfortable making decisions without supporting data. To do that, everyone must have quantifiable goals. "One of the things I did was establish measurable, outcome-based objectives for the team that turned strategy into something actionable for them," says Austin. "This helps the team to be very clear about the goals they needed to deliver in order to support the organization."

FASTER

In this Section...

KATELYN WATSON

Vice President of Marketing
IfOnly

Katelyn has more than 13 years' experience working with agencies and large brands, including Brinker Restaurants and SunTrust Bank via Omnicom agency RAPP. After leading digital marketing for La Quinta, she led the acquisition team at Shutterfly. In 2013, Katelyn was named a Top 40 Under 40 marketer in the Bay Area and started at IfOnly as vice president of marketing. She is an advisor and mentor for Tradecraft, and an advisory board member for iMedia, sfBIG, and Brand Innovators.

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According to Katelyn Watson, marketers striving to work faster while avoiding the chaos that arises from too much feedback should consider a strategy she calls *return on effort*. Although the concept of return on investment is already well understood, the key to unlocking efficiency within your team is in not letting the perfect be the enemy of the great. Says Watson, "Return on effort makes an impact in companies that are trying to be more efficient, spend less money, and consistently do more with less."

She puts this philosophy into practice with her staff on a consistent basis, even at the project or task level. If they're working on a marketing piece and one of her marketing managers is getting input from a variety of different places, for example, the project may well grind to a halt if that manager tries to take every single bit of input into account. They might never finish a piece of copy or finalize an image because everyone has a different opinion on how it should be done. "We call that *swirl*," she says. "It's like bumping into yourself and just not being able to execute because you're overthinking things."

To break the gridlock, Watson issues a challenge to her team: "Take each individual piece of feedback and ask whether it changes the conversion rate.

KEY LESSONS

1 When faced with feedback, marketers should evaluate it based on whether it will improve the desired business outcome.

2 Marketers can get more work done faster when they trust their expertise as well as that of their team and their vendors.

> " *Return on effort makes an impact in companies that are trying to be more efficient, spend less money, and consistently do more with less.* "

If the answer is yes and it will have a huge impact, then do it. If the answer is no, which in many, many, many cases you find that it is, then you move on and get it done."

Watson makes a point of hiring marketing professionals who are excited to work this way, and she finds that the shared goal of working with greater speed and agility offers benefits to both the company and its employees. "They're able to be empowered as well," she says," because I'm not going be a crazy micromanager who checks every little piece of everything they do."

It's important to trust yourself and your team when making decisions at a rapid pace, Watson advises. Not only must you have confidence in your expertise and that of your staff, but it's also crucial for you to have faith in your vendors and their deep knowledge of the marketing landscape. "When you think about how much farther you can go from that moment that you're in by making quicker decisions and leaving expertise to the experts, in a way you're gaining revenue and results that you wouldn't have just by moving faster and putting that trust in," she explains.

Watson's marketing hack is this: consider all your decisions from a standpoint of return on effort. If the feedback you're faced with has a high likelihood of delivering the business outcome you seek, then pursue it and learn from the results. If not, move on and get the work done. The time you free up in doing so will allow you to accomplish your goals more quickly, with less chaos and swirl along the way. A good way to put this hack into action is to have your team plan their day and their projects based on this return on effort philosophy. ■

> *Take each individual piece of feedback and ask whether it changes the conversion rate.*

JEREMY EPSTEIN

Vice President of Marketing
Sprinklr

Jeremy Epstein joined Sprinklr in January 2012. He is responsible for demand generation, including PR, analyst relations, influencer relations, events, trade shows, and content marketing. Previously, he was the founder and CEO of Never Stop Marketing, an international consulting firm that served Fortune 500 clients, including Johnson & Johnson and Microsoft. Jeremy believes technology has the potential to connect a socially disjointed world. He has a B.A. in History and a double minor in Economics and German from Johns Hopkins University.

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Every organization has a different method for performing marketing tasks. Jeremy Epstein, vice president of marketing at Sprinklr, says that's part of what makes creating standardized, repeatable processes difficult within some marketing organizations. "No process is going to be perfect, and no process is going to withstand the test of time," he says.

Because time and circumstances break existing processes or make them less efficient, Epstein recommends that organizations establish a culture that makes it comfortable for marketers to know when a process isn't working and change that process quickly if necessary. "Too many times, people are held back by what they believe others will think. In an era of such turbulence, especially in the marketing world, what appears to be the safest strategy is actually the riskiest thing you can do. To be great, you have to be comfortable with taking risks."

Risk taking can even apply to repeatable processes. As Epstein points out, several factors can affect processes that were established to be more efficient.

KEY LESSONS

1 My marketing team hack is leveraging a military strategy called Commander's Intent, which guides actions based on the intent with which orders are given, yet allows flexibility for the method to achieve them.

2 Maintain a meta-process of viewing your existing and new processes through a filter that determines if the processes still work and if they help your team to achieve the desired outcomes.

> *Marketers need to understand they don't have to follow existing processes if they don't work….You have to give them permission to modify and update inefficient processes, which is healthy.*

Over time, those processes can actually become less efficient and more cumbersome. To help determine which processes are working and which are not, Epstein suggests using a military strategy called Commander's Intent, a directive that guides actions based on the intent with which orders are given.

For example, a military commander might give the order to take a specific landmark. During the discussion, the commander may suggest that the best way to do that would be from the left. Once soldiers begin the engagement, however, the left side turns out to be a field of landmines. Those soldiers know that they can (and should) choose a different route for securing that landmark, because the commander's intent was to secure the landmark through whatever means were necessary. Sometimes the original plan for how to achieve a specific goal won't work. Marketers should feel comfortable with changing a process if it becomes necessary to achieve the desired result.

"Marketers need to understand they don't have to follow existing processes if they don't work," Epstein says. "They have to achieve the objective. You have to give them permission to modify and update inefficient processes, which is healthy. And you don't want to be too rigid because then it makes it impossible to do anything quickly."

> *Constantly review your processes and ask: are we driving the desired outcomes, and are we driving those outcomes as efficiently as possible?*

To help determine if existing processes are efficient or if new processes need to be established, Epstein recommends having a meta-process that examines questions such as:

• Do these processes actually work?

• Are we achieving the outcomes that they were originally designed for?

• Is there new information after we've run a new process that will help us improve it?

• Is there any way we can use technology to save time and make processes faster?

• Do we need to do something manually because otherwise the quality suffers?

"Constantly review your processes and ask: are we driving the desired outcomes, and are we driving those outcomes as efficiently as possible?" He also points out that organizations should be "Looking at every part of the process, but also looking at the whole marketing process. Look at it as a systems-wide engineer," he says. In this way, you can compare whether what is happening facilitates the intent and the desired outcome. ◼

AMANDA GOETZ

Director of Marketing
Internet Media Company

Amanda Goetz has been in digital marketing for over more than 10 years. With experience in marketing and sales experience at large companies like Ernst & Young and as well as launching her own tech start-up in 2013, Amanda delivers practical insights and tactical steps for more efficient and effective cross-functional marketing. Amanda was recently featured in Dream, Girl —a documentary film showcasing women in business. She currently leads consumer and product marketing at a top media company in New York City.

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For many companies, product development and marketing live in their own operational silos, driven by their own key performance indicators. Yet, at some point marketing must begin promoting the product that is coming to market. "The potential disconnect between product and marketing can create a host of problems, especially when marketing is brought in at the end of a product development cycle," says Amanda Goetz, who is director of marketing at an internet media company.

When the product group is working through their development process, they are focused on defining, building, testing, and iterating features to meet a functional specification. As the product nears release and it comes time to bring marketing into the process, the marketing team may see a product that does what it is supposed to do but is missing an essential marketing hook. For instance, it may not properly align with the business's overall brand voice or mission. "Personalization is a big part of our brand," Goetz explains.

> " *The potential disconnect between product and marketing can create a host of problems, especially when marketing is brought in at the end of a product development cycle.* "

KEY LESSONS

1 **Marketing has an opportunity to improve product brand alignment and test marketing messages during the iterative development process.**

2 **Ask lots of questions and help the development team understand market data that shows where marketing is coming from in a way that establishes baseline objectives.**

"We want people who come to us to feel like we are personally helping them. It's important for me to work with product to make sure the things they build have that personalized feel and provide a joyful experience."

By starting a dialog with product development much earlier in the development cycle, marketing not only has the opportunity to provide input into design elements for better brand alignment, but they can also test promotional messages during the iterative development process. "Being a part of that process actually makes my marketing smarter because I am able to test the positioning and value propositions to smaller groups of users," says Goetz. "Participating in the research to understand how our users respond to and interact with each product helps me create an even smarter go-to-market campaigns."

But how does marketing establish that closer working relationship with product development? "I challenge my team to become involved at the early stages of product design and development," says Goetz. To do this successfully, you must understand your specific company's product organization and work cadence, and you must stay in close touch with the product managers. You need to become a stakeholder, attend stand-ups or Iteration Planning Meetings (IPMs), and have weekly one-on-ones with product managers to stay totally aware and in-step with what is happening. You also need to add value to the process. "You must understand the issue they're trying to solve and be part of the value add, not the person who comes in to tear things apart," says Goetz. This means you must avoid being prescriptive. It is better to ask lots of questions and help the development team understand market data that shows where you are coming from in a way that establishes baseline objectives.

> " I challenge my team to become involved at the early stages of product design and development. "

Marketing can also contribute to the product development process during feature testing to see how different markets or user segments respond to those features. Of course all that market testing becomes the basis for optimal messaging and positioning that goes into emails, landing pages, web seminars, the educational track, social and other marketing materials that make up the go-to-market campaign supporting the larger feature package. "If you have been a part the development process all along, then you will be better able to create a buzz-worthy campaign with maximum impact and organizational buy-in along the way," says Goetz. ■

MORE INNOVATIVE

In this Section...

ADAM FISHMAN

Vice President,
Growth Marketing
Patreon

Adam is a growth and marketing executive with more than a decade of experience building and growing companies. He was the director of growth for Lyft, taking them from their first ride to their 70th city. He now leads growth and marketing for Patreon, whose mission is to fund the emerging creative class. He holds a degree from the University of Michigan. Outside of work, he is a husband, father, and hockey player.

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Adam Fishman believes a marketer can add visibility to the marketing process in several creative ways. He begins with the way he structures his teams and their work. "We have area owners who are responsible for specific channels or thematic areas like content marketing or paid acquisition," he explains. "We define our company objectives and results at the start of the quarter using the Objects and Key Results (OKR) framework. Then area owners spend time brainstorming, collecting feedback, and developing a backlog of ideas around their particular channel with these OKRs in mind."

The backlog of ideas that each area owner creates is entirely public, and the goals of area owners and team members are entirely public as well. "It's my job to socialize that across the organization," Fishman adds. "I meet with team leads in different parts of the company and explain to them what types of things we're going to be working on. I do this in a series of 1-on-1 meetings to get feedback and buy in. I also present highlights from our work to the broader company on a weekly or monthly basis at events like our all-hands meeting. That aligns us with the organization, reminding people of what we're working on and why we're working on it."

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" *I meet with team leads in different parts of the organization and explain to them what types of things we're going to be working on.*

KEY LESSONS

1 Marketers can increase visibility by providing regular, consistent updates on their team's work both in person in a grassroots fashion and via email.

2 Project management and collaboration tools can also be creatively leveraged to create enhanced visibility about the marketing process.

As a piece of work is completed, Fishman's team creates a learnings document that summarizes the team's initial hypothesis about the task and their conclusions on the impact it has had on the business. That document is made visible to the rest of the organization. "Our experiment and learnings documents are shared in our in our project management tool. It can be searched, discovered, and referenced by anyone," he says.

Another way Fishman adds visibility to the marketing process is by sending out an end-of-the-week email update featuring projects that they have completed, work that is in the pipeline, and things that they've learned. "I also show what is coming up next and why, and then there's an entire learning section," he says. "I try to make our weekly email fun and interesting to read. It's also opt in because we all know that email glut can be a problem at companies. Our weekly update email list seems to be growing over time as more people realize that it's an interesting and exciting thing to be a part of."

Fishman's team makes use of a collaboration tool for communicating internally within the company to enhance visibility for the work they are doing in marketing. "We have channels specifically devoted to topics like analytics, growth, marketing, and marketing wins. We are constantly posting learning points and things that we considered wins into those channels. It's a passive way for the rest of the company to decide what that they want to consume. If they're interested, they can go and explore that channel and learn about things that we're doing and what the impact is."

Ultimately, Fishman's marketing hack is this: provide a variety of creative ways, both active and passive, for colleagues in your organization to stay up to date on your team's work. This includes personally initiating grassroots conversations and using technology to share and store updates that can be accessed and referenced at any time. Doing so creates better alignment with the organization as well as opportunities for more effective interdepartmental collaboration.

> "
> *Our experiment and learnings documents are shared in our in our project management tool. It can be searched, discovered, and referenced by anyone.*
> "

SHAWN DICKERSON

Director of Marketing
Workfront

Shawn Dickerson has nearly 20 years of experience in managing marketing teams for Fortune 1000 companies, venture-backed firms, and small startups. In his current role, he oversees the go-to-market strategy for Workfront. Prior to Workfront, Shawn led product marketing, demand generation, and public relations teams at Domo, Novell, and other tech companies.

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If you grew up in the '80s like I did, there are a few movies that stand out as indelibly quotable for the entire generation. Ferris Bueller's warning that "Life moves pretty fast, [and] if you don't stop and look around once in awhile, you could miss it," comes to mind. As does Indiana Jones' lament, "It's not the years, honey, it's the mileage."

But perhaps the most quotable film of the decade is the tale of Buttercup's journey to find true love in *The Princess Bride.* In one particularly memorable scene, the evil Vizzini keeps using, or misusing, the word "inconceivable," at which point his hired gun Inigo Montoya says, "You keep using that word. I do not think it means what you think it means."

Inigo's words are an apt description of Agile Marketing, as well. It has the potential to be one of the most powerful marketing hacks we've seen in years—but for most, Agile Marketing does not mean what they think it means.

Being agile—with a little "a"—is a great quality for any marketer. When you're agile, you're flexible, adaptable, and responsive. But that is NOT Agile Marketing. »

KEY LESSONS

1 Agile Marketing is more than just being adaptable and responsive; it's an actual work management methodology that can be applied to marketing work.

2 Start by consolidating your work requests, developing a sprint planning process, and adopting a visual representation of your team's work.

> *Being agile—with a little "a"—is a great quality for any marketer. When you're agile, you're flexible, adaptable, and responsive. But that is NOT Agile Marketing.*

Agile Marketing—with a capital "A"—is an actual work management methodology that can be applied to marketing work, similar to how it's been applied to software development for more than a decade. Most marketing teams plan and execute their work in a traditional Waterfall format, featuring multi-quarter campaign plans, a linear list of tasks, and lots and lots of spreadsheets. While this traditional planning approach has its place, marketing work has evolved to include hundreds of distribution channels, highly segmented audiences, and dozens of asset formats. To keep up with this rapid pace of change, marketers need an approach to work that allows them to get campaigns and content to market faster than ever before, and ensure those assets are completely aligned with stakeholders' expectations.

That's where Agile Marketing comes in.

While software like Workfront is made to help marketing teams transition to Agile, there are also some key principles any team can adopt without an investment in new technology:

• First, **start by consolidating your work requests.** Most marketing teams field work requests from a dozen different directions: emails, IMs, sticky notes on a monitor, or even a hallway conversation with an executive. To begin a transition to Agile, start by establishing one queue for all work requests. This queue could be as simple as a shared email address or a Google form. But the idea is that you can't begin to execute more quickly on your work if it's almost impossible to get your arms around everything you're supposed to work on, because it's scattered across a half-dozen tools.

> " *Taking the Agile leap can seem daunting, but you don't have to bite off the whole methodology at once.* "

• Second, break up your work into smaller, consumable chunks and **develop a sprint-planning process**. In Agile parlance, a sprint is a defined period of time in which you agree to accomplish a certain amount of work. Sprints are usually one to four weeks in length, and they give a marketing team much more visibility into the team's work, as well as more predictable outcomes. All of that translates into faster delivery.

• Finally, be sure to **track your work visually**. Workfront offers a rich Agile storyboard, but even a poster board with sticky notes will work. The idea is to create a visual for each task to be completed and then move those tasks across various swim lanes, or statuses, such as New Request, In Process, Out for Review, and Completed. A consolidated visual for team members and stakeholders alike helps keep everyone on track and in the know.

Taking the Agile leap can seem daunting, but you don't have to bite off the whole methodology at once. Simple tricks like the suggestions above can allow you to start adopting Agile processes at your own pace—and in turn, deliver high-quality work, faster than ever before.

CHALVA TCHKOTOUA

Group Vice President,
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Services Marketing
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Chalva Tchkotoua is a senior marketing executive with more than 20 years of experience leading complex global integrated marketing programs to support sales and lead generation for enterprise, business-to-business, and consumer clients. He has worked for global companies such as Accenture, Aricent Group, and Time Warner Cable Business Services. His primary focus areas are centered on go-to-market strategy, voice of the customer and buyer life cycles, integrated marketing programs, digital transformation, and data analytics. He contributes regular blogs on cloud trends.

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When creating a culture of innovation at an organization, Chalva Tchkotoua believes that it's important to support strong collaboration within your team. "Be very inclusive of your marketing team and keep challenging conventional thinking," he says. "You may end up taking a path of more resistance, but by that same token you may also achieve results beyond what you expected."

Of course, to foster the kind of collaboration that makes such success possible, any newly minted marketing director should keep a focus on eliminating pain points the team may encounter when working in a group. "When your marketing team is working closely with the product group or the sales team, you can run into what I call a 'not invented here' mentality," Tchkotoua says. In such cases, it's not uncommon for marketing's colleagues in the product or sales divisions to voice resistance to an idea that didn't originate from among them.

When such pushback emerges, the marketing team needs to find a way to get people excited and invite them to embrace the project. Tchkotoua offers some advice, by way of an example, for marketers confronting this challenge.

KEY LESSONS

1 To build a culture of innovation, marketing directors must ensure that their teams are collaborating in an effective manner.

2 When encountering resistance to a marketing project, take an inclusive approach and clearly communicate the business value that the project poses.

Be very inclusive of your marketing team and keep challenging conventional thinking.

His team recently partnered with a couple of analyst groups to develop a short online questionnaire on the topic of cloud adoption for Time Warner Cable Business Services' business-to-business customers. The survey was designed to assess and understand where customers were in their stage of cloud adoption—whether they were early adopters or full-fledged champions of the cloud.

At first, the questionnaire seemed to be coming together nicely. "But when we ran it by the sales team, they were like, 'Oh no, no, no. We don't want to send this out to our customers. This is a waste of time,'" he says. To address the resistance coming from sales, Tchkotoua decided to position the project in a way that more clearly communicated its business value. "I asked them, 'Listen, wouldn't it be great if we could glean additional insights from our customers that maybe today are just in the hosting space but might have different plans six months, nine months, or even 18 months down the road?'" he explains.

When sales had a better understanding about how the survey could benefit their customers and their division, they enthusiastically supported the project. "They couldn't get enough of it. They asked, 'Can we get this out to all our customers?'" Tchkotoua says. He observed a nearly 180-degree change in attitude, from strong resistance to the project toward a full embrace and comprehensive adoption of the end product.

Tchkotoua's marketing hack is this: foster a culture of innovation by removing the layers of resistance and bureaucracy that may bog down a project. The resulting agility and speed will help you achieve quick, meaningful results that drive business value. As your successes pile up, your teams will also be energized and highly motivated to keep the momentum going through creative innovation and effective collaboration.

> *When your marketing team is working closely with the product group or the sales team, you can run into what I call a 'not invented here' mentality.*

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