

# Agile Marketing as a Key Driver to Increasing Operational Efficiencies and Speed to Market

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## Abstract

The COVID-19 pandemic has profoundly changed consumer behavior and has accelerated digital transformation across businesses. As a result, businesses accelerated adoption of technology, launched new digital initiatives, enhanced supply chain and digitized internal workflows to meet rising consumer expectations and drive growth. Although, pandemic resulted in change in mindset across various business functions, marketing has been slow to adapt and still follows traditional strategies that are mostly outdated and fail to keep pace with the constant change in requirements. To keep pace with rapidly changing industry trends, constant disruption and competitive pressure means marketers will have to become more agile and nimble. The goal of the paper is to outline fundamental concepts around agile methodology and serve as a guide for marketing organizations to incorporate agile practices into marketing strategies to be able to rapidly react to meet changing business goals.

**Keywords:** agile, agile marketing, agile frameworks, Scrum, Kanban, Scrumban, customer experiences, personalization, digital transformation, operational efficiencies, workflows, go to market, Covid-19 pandemic

## 1. Introduction

In today's age of technological advancement, increased customer expectations, and competitive pressure from industry disruptors, marketing team needs to evolve and revamp their existing traditional processes and workflows. With explosion of digital channels and emergence of various social media channels, expectations and marketing requirements have become increasingly complex. It is critical but challenging for marketers to shift gears quickly within a traditional marketing model. By incorporating agile methodologies, marketing teams will understand trends quickly, gain insights faster and identify opportunities to go-to-market rapidly. Agile marketing is an approach where marketers are flexible, open, and responsive to change, rather than following pre-defined linear workflows. Having an agile mindset will allow marketing departments of any size and structure to be more efficient, work iteratively and deliver a successful marketing strategy. As described in the below chart, Agile marketing moves away from traditional linear waterfall methodology where you follow each step sequentially to a more iterative model.

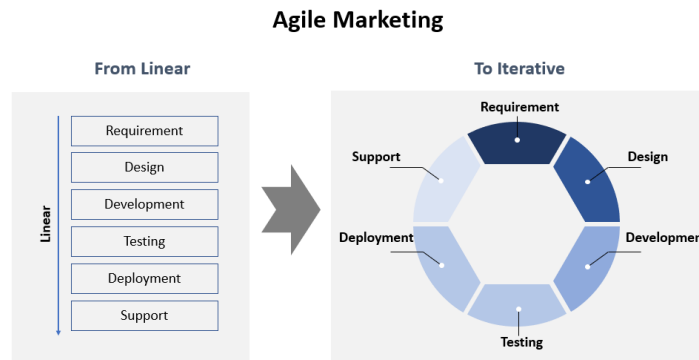


Figure 1. Agile marketing approach

Let us dive deeper into the concepts of Agile, how it can be applied to marketing and benefits of Agile marketing that businesses can reap.

## 2. Theoretical Concepts

### 2.1 What Is Agile Marketing?

Agile is very familiar word in Software development function. Agile methodologies have transformed the software lifecycle development by working on smaller components of the problem, encouraging continuous iterations, and collecting and acting on continuous inputs & feedback. This process has helped product management, engineering teams become nimble and innovate at a rapid pace. Covid-19 pandemic has changed the business and industry dynamics and has forced the business leaders to adopt agile practices across various business functions.

Marketing is a key growth driver for business but has historically followed traditional processes and workflows with an aim to increase sales and revenue. However, with recent explosion of media channels and digital touchpoints, marketers have become more customer centric and are focused on delivering personalized experiences tailored to individual consumer preferences. To improve speed, adaptability to change and deliver personalized experiences at scale, organizations are implementing agile methodologies in marketing and adopting agile marketing model.

Agile marketing is an approach to marketing processes that leverages data, insights, and measurement to continuously inform marketing strategy and planning and allows to drive innovation and change. It applies best practices of agile methodologies to marketing processes so that cross-functional teams are collaborating and iterating on a campaign frequently with continuous feedback. This also means that teams are self-organized and are working independently while making sure that the outcome is aligned to the broader strategic vision and business objective. It is an organizational strategy that manages and improves the working of a marketing team by streamlining communication, team structure, workflows, and processes to increase efficiency and quality.

Below are the three key characteristics of a successful agile marketing team:

- **Agile based team structure & collaboration:** comprises of core team and cross-functional members that are key to driving the business objective
- **Data-driven decision making:** leverage analytics and qualitative data to gather consumer insights, measure performance and continuously iterate and adjust approach as needed based on customers' needs
- **Rapid deliverable cycles:** Focus on frequent releases, tackle small tasks in short timeframe and launch iterative releases. Increases ability to adjust and iterate course of action

Agile marketing can be defined as a continuous, iterative process that provides flexibility to marketers and encourages experimentation. A simple approach to agile marketing with key stages is outlined below. These phases will look different across organizations.

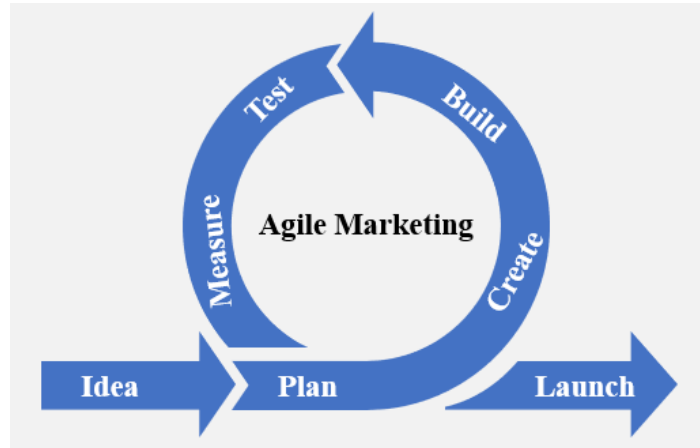


Figure 2. Different phases of agile marketing

- **Idea:** different ideas or projects are driven by customer needs and business goals
- **Plan:** initial requirements along with resources and budget for the projects are discussed and formulated. Teams also decide on a suitable timeframe for the cycles
- **Create:** the focus of this stage is on two components: a) identifying the target audience so that tailored content can be created for the audience segment b) defining KPIs and goals that are aligned to the overall business objective
- **Build:** in this stage, the teams work on creating the content, segments, configurations
- **Test:** teams implement and test the campaign across different channels, devices defined in the plan
- **Measure:** teams constantly track, monitor and analyze performance and make changes based on the results
- **Launch:** the project or campaign is deployed

2.2 Key Differences Between Traditional vs Agile Marketing

Traditionally, marketing is siloed and works independently on big ideas with long planning cycle and requires considerable effort. Agile marketing breaks down these silos by taking a rather iterative and adaptive approach to marketing. Below are the key differences in traditional vs. agile marketing.

Table 1. Key differences between traditional and agile marketing

Theme	Traditional Marketing	Agile Marketing
<b>Team Structure</b>	Siloed teams	Cross-functional teams
<b>Timeframe</b>	Long planning and development cycle	2-4 weeks iterative cycles
<b>Approach</b>	Long term strategies	Short sprints aligned to business objectives
<b>Execution</b>	Rigid and Fixed per the strategy	Creative, real-time, and flexible
<b>Data</b>	Limited usage of metrics and insights	Data-driven with clearly defined metrics

### 3. Research Methodology

#### 3.1 Agile Marketing Frameworks

There are three most popular agile methodologies that can be applied to marketing – Scrum, Kanban and Scrumban (hybrid model combining Scrum and Kanban). Both Scrum and Kanban provide different approaches and strategies for implementing agile, whereas Scrumban leverages the best practices from both Scrum and Kanban.

Although these practices have their pros and cons, the marketers will follow the methodology and practices based on their team structure, existing workflows and business context.

#### 3.2 Scrum for Agile Marketing

The Scrum framework addresses challenges inherent to marketing around:

- Teams losing sight of long-term goals while working on new campaigns
- Teams getting bogged down in every little details
- Increased complexity and changing preferences across consumers that marketers are trying to engage and target

The Scrum framework addresses these challenges:

- Teams are encouraged to regularly meet to discuss progress on short-term goals. All the short-term goals contribute towards the long-term objective
- Teams can test, iterate and course correct that drives productivity, flexibility, and adaptability to change
- Inculcates test and learn culture by constantly launching things to market and gathering insights. This allows marketers to understand customer needs and provide content that best serves the customers.

The Scrum framework includes 4 key events that are involved inside a Sprint:

- **Sprint Planning:** Team comes together at the beginning of the sprint to discuss the project items and define the sprint goal.
- **Daily Scrum:** Time-boxed, daily meetings to assess progress towards the Sprint Goal, review plan for next 24 hours and discuss any open blockers
- **Sprint Review:** Takes place at the end of the Sprint, where team discusses and reviews the result of the Sprint
- **Sprint Retrospective:** This is the final meeting for the Sprint where the team analyses the Sprint process and discusses future improvements.

Agile marketing teams will use the Scrum framework to run sprints on a project with a defined goal. For example, let us consider acquisition team is creating 8 different landing pages for the new acquisition campaign. This can be broken down into four 2 weeks sprints to complete 2 landing pages. The key for success here is that each Sprint has a specific goal that is achievable and measurable. At the end of the Sprint, the review and retrospective will focus on the result and analyze the process to improve next iterations.

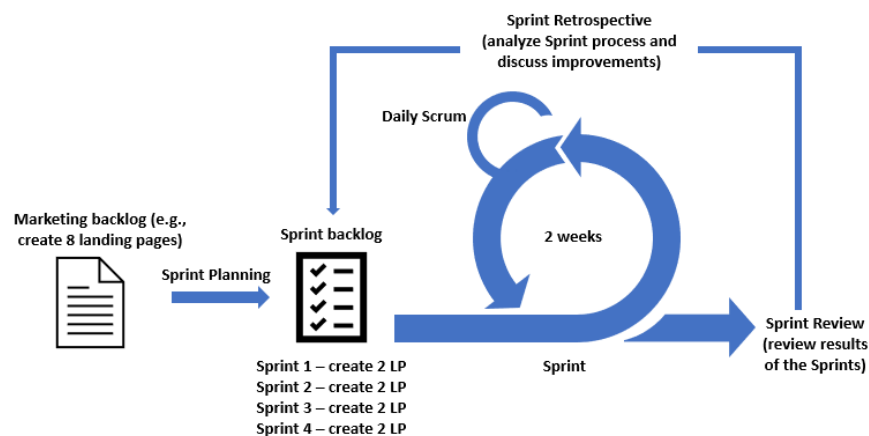


Figure 3. Scrum Sprint example form agile marketing

### 3.2.1 Kanban Framework for Agile Marketing

Kanban is a more visual way to organize workflow and manage “To-Do” list to maximize efficiency of implementing tasks. Kanban compared to Scrum is less structured in terms of team structure and project management. However, Kanban is less prescriptive and more adaptable compared to Scrum. Kanban framework revolves around Kanban board, which provides every team flexibility to tailor it to specific needs and objectives they are driving towards. The Kanban board helps teams organize their tasks around workflows that help progress towards the ultimate objective.

Marketing teams can leverage Kanban to map the end-to-end marketing workflow to visualize work, manage tasks, review, and approval steps.

Below are the five key principles of Kanban:

1. **Visualize the Workflow:** use Kanban boards (with cards and columns) to visualize work, process, and tasks for a project
2. **Limit Work in Progress (WIP):** set a limit on maximum items per column to make the work manageable and improve efficiency
3. **Manage flow:** prioritize a continuous and smooth flow of work items between stages
4. **Improve collaboration:** encourage collaboration across organization to improve processes, increase efficiency leveraging data, feedback, and performance
5. **Implement feedback loops:** implement feedback loops to identify opportunities to adjust based on performance comparison with expected outcomes

A Kanban board has four common states of work but can be expanded based on the objectives and teams. It can include swimlanes for individual stakeholders or different functions e.g., Content, Design, Social Media etc.

A basic Kanban board for creating a personalized landing page for a campaign is shown below:

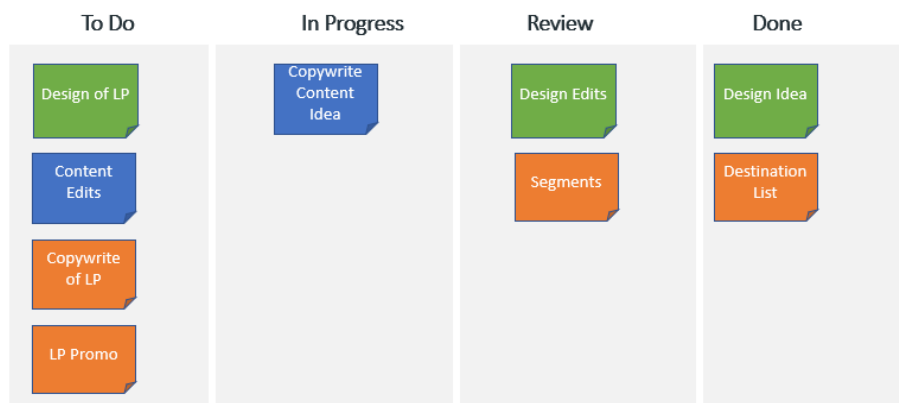


Figure 4. Kanban board example form agile marketing

### 3.2.2 Scrumban Framework (Hybrid Model Combining Scrum and Kanban) for Agile Marketing

Scrumban, also known as Modified Scrum, is a hybrid of both Scrum and Kanban methodologies. This approach provides the flexibility and adaptability of Kanban and structure and formality of Scrum process together. It leverages sprints from Scrum and visual storyboard and swimlanes from Kanban.

In Scrumban, marketing teams will work in small iterations of 2 weeks just like Scrum and visualize the entire project on a Scrumban board, just like Kanban. Scrumban also utilizes WIP limits from Kanban to make sure that teams are focused on delivering set of projects without overwhelming themselves.

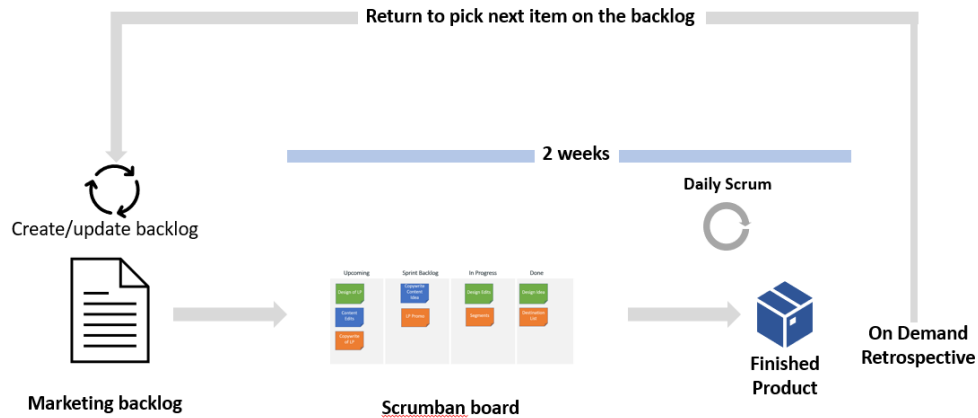


Figure 5. Scrumban example form agile marketing

3.2.3 Methodologies Comparison – Scrum vs Kanban vs Scrumban

To summarize, all the three methodologies provide quite distinct methods and practices to optimize the marketing teams and drive impact to the organization. Below table will explain key differences and provide guidance on when to apply each framework.

Table 2. Key characteristics of Scrum, Kanban and Scrumban

	<b>Scrum</b>	<b>Kanban</b>	<b>Scrumban</b>
<b>Team size</b>	Small teams (3-9)	No specific limitation	No specific limitation
<b>Iterations</b>	Short sprints (1-4 weeks)	Continuous workflow	Continuous workflow with shorter iterations (1-4 weeks)
<b>Roles</b>	Product Owner, Scrum Master, and Scrum Team	No specific roles	No specific roles
<b>Planning</b>	Sprint planning	Based on demand, release planning	On-demand for new tasks
<b>Estimation</b>	Before each Sprint starts	Done when required	Done when required
<b>Scope Limits</b>	Limited based on Sprint duration	WIP (Work-In-Progress) limits	WIP (Work-In-Progress) limits
<b>Meetings</b>	Sprint planning, Daily Scrum, Reviews, Retrospective	Optional	On-Demand planning
<b>Task size</b>	Depends on what can be completed in the Sprint	Any size	Any size
<b>New items in iteration</b>	Not allowed	Allowed whenever the queue allows it	Allowed whenever the queue allows it

## 4. Findings and Discussions

### 4.1 Case Study

All three Agile Marketing methodologies provide frameworks and practices that can be leveraged based on team structure and business objective. Let us look at real-life examples of how organizations across different industries have adopted these methodologies into their marketing function.

#### 4.1.1 Santander Bank, a Leading Consumer Finance Brand Adopted Agile Marketing to Drive Effectiveness Using Scrum

**Challenge:** Santander Bank was facing challenges with lengthy review cycles and long review timeframe that were not effective in tweaking marketing campaigns based on industry trends, consumer data & insights.

**Solution:** Santander Bank adopted Scrum’s 2-week sprints instead of traditional lengthy review cycles to evaluate advertising performance to enhance efficiency and effectiveness of creative and media. This allowed them to make changes to the campaign on a weekly basis using consumer feedback.

The teams used to meet every morning to align on priorities for the day, monitor the activities daily and make any changes the following week.

As a result, successful campaigns got more budget funding and unsuccessful ones were abandoned.

**Impact:** The results were outstanding and drove value across KPIs

- Loyalty increased by 12%
- The Net Promoter Score (NPS) was at its highest in 17 years
- Account satisfaction measured as trust and advocacy also increased by 10%
- Highest ever positive sentiment received at 90%

#### 4.1.2 Alberta Motor Association, an Insurance Company Used Kanban Boards to Drive Innovation and Creativity in Their Marketing

**Challenge:** The organization consisted of 40 people who were spread across multiple interdependent teams and as a result struggled with dependencies, handoffs within the teams and creating transparent processes.

**Solution:** They redesigned their Kanban boards, resized the cards to improve communication across teams. In addition, they also transitioned the creative services teams to an agile flow-based approach to free up some of their work. One of the critical components of redesigning the Kanban board was the addition of Pen column. This column was where all the external work outside the team’s control resided. This helped them maintain visibility into each task including status without stopping all the work while they were working on tasks or waiting for feedback.

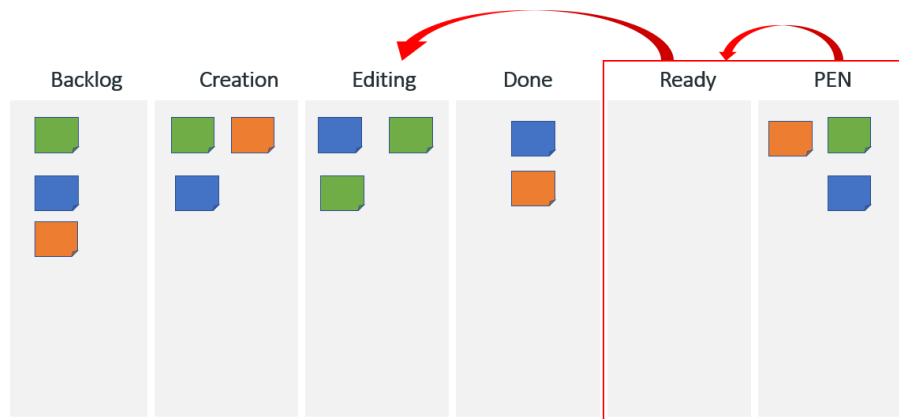


Figure 6. Example Kanban board implemented by Alberta Motor Association

**Impact:** The transformative process of updating Kanban boards with Pen helped them simplify the complex review process and drive efficiency and productivity across teams.

#### 4.1.3 CA Technologies, a Software Company Went Through an Agile Journey (Scrumban) to Be Faster to Market, Iterate Rapidly and Improve Team Morale

**Challenge:** Teams faced challenges that are typical to large enterprise marketing – too much work, lot of last-minute fire drills, and lack of prioritization because of lot of inputs and requests for work.

**Solution:** CA started with a pilot team of 35 cross-functional marketers, called “Agile Delivery Group” to focus on specific initiatives. Over a period, this team grew to over 100+ people in six Delivery Groups aligned to different business units.

These teams experimented with different Agile practices before deciding to use a Scrumban approach. They combined practices from Scrum such as daily stand-ups, and retrospectives with face-to-face planning sessions.

**Impact:** The transformative approach resulted in significant impact

- Sales pipeline increased by 20%, while marketing budgets remained flat
- Faster speed to market for campaigns - delivered in 2 weeks from 1-2 months
- Win rate for marketing sourced sales opportunities increased by 3x
- Team engagement increased by 6 points from previous year

#### 4.2 Benefits of Agile Marketing

Agile marketing will help marketers be successful in delivering their marketing strategy, elevate consumer experiences and engage consumers throughout the journey. Below are key advantages of embracing agile marketing:

- **Faster speed to market:** Agile marketing teams are better organized, focus on speed and iterate based on feedback to drive change. This results in increased productivity, faster go-to-market for products and campaigns
- **Flexible & Nimble teams:** Agile marketing teams leverage data driven analyses to switch gears more quickly and effectively
- **Drive productivity:** Deploying agile best practices helps eliminate barriers, reduce time spent on redundant and low value tasks and complete tasks on schedule. This increases overall team productivity and morale
- **Foster innovation:** Agile brings cross-functional teams together and unites them on common business objective. This promotes a culture of creativity and drives innovation
- **Improved measurement:** increased ability to measure and monitor results allows teams to make real-time adjustments to the campaigns to enhance results, reduce budgets and improve performance

#### 4.3 Key Considerations While Implementing a Successful Agile Marketing Culture

Agile marketing has a significant impact on the business. However, there are key things to consider to be more effective in implementing agile marketing processes.

- **Top-down change & communication:** Implementing agile marketing sometimes requires a business to undergo significant transformation. This can be challenging, specially in a large organization that has traditional processes and systems. Therefore, it is important that the change is communicated by the C-level leadership across the organization
- **Align on objectives & goals:** Marketers might put more emphasis on short-term goals which might have an impact on long-term goals. Therefore, it is important that the marketers define clear cut short term and long-term goals and align them to the business objectives
- **Acquire talent:** Finding talent is difficult and time consuming. Identify gaps quickly and start the process recruitment process early or leverage partners.
- **Implement right technology:** Marketers rely heavily on technology and data to gather feedback, iterate and launch campaigns. Therefore, having the right technology and efficient processes is critical step in implementing agile marketing.

## 5. Conclusion

As organizations become more and more focused on deepening customer relationships and providing personalized omnichannel experiences, marketing functions need to adapt to the rapid changes and operate differently than the traditional way. The increased demand and needs of modern-day marketing are driving more and more companies to increase adoption of agile methodologies in marketing. The study provides conceptual frameworks and



methodologies to incorporate agile practices such as Scrum, Kanban and Scrumban into marketing workflows and processes. The findings will be of significant interest to marketers who are looking to increase operational efficiencies across the organization and accelerate delivery of campaigns and products to market. The guidelines, frameworks and key implementation considerations will advance the understanding and knowledge of marketers on which Agile framework to implement and how to setup their teams and workflows to increase agility and operate iteratively.

Agile Marketing provides tremendous benefits and growth opportunities. However, organizations should consider and evaluate complications and challenges in transforming the business, driving change internally and enabling teams on agile practices before embarking on this journey. As discussed in the study, there are multiple different approaches to implement agile marketing, but companies should start small, proceed gradually, test and learn before expanding across the organization.

## 6. Limitations and Scope for Future Research

Although the research findings provide an excellent conceptual and empirical overview of Agile Marketing, there are some limitations that may be addressed in future research.

The concepts and qualitative analysis include high level frameworks and case studies that are applicable to marketing function. However, further research and study would be needed to explore how this topic can be applied to sub-functions within marketing. Future research may build upon this study to gather insights and feasibility of results in various other organizational settings.

Future studies could also leverage additional data sources such as surveys and interviews to collect information from key stakeholders to understand their implementation strategies and benefits.

Finally, more research and study are needed to understand how agile marketing approaches vary across companies depending on organization size, industry, business models, culture, and maturity. The research findings could be drastically different depending on these parameters.

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