

The Agile Marketing Playbook



**How to get started with Agile Marketing,
and the tools you need to get there.**

What is Agile Marketing?

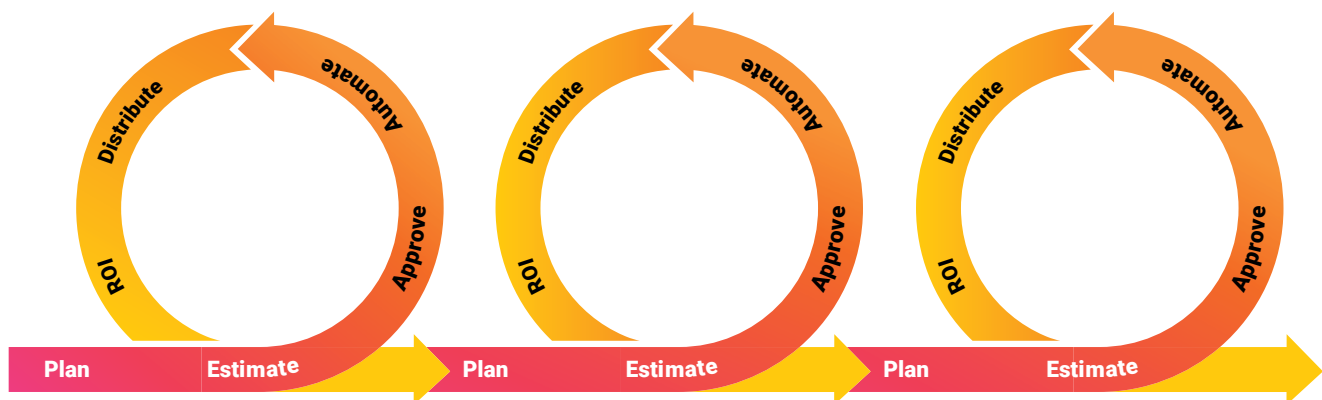


Agile Marketing leverages the practices and principles from Agile Software Development and puts them into practice for marketers.

Simply put, Agile Marketing is a set of business and marketing practices that lets inter-connected teams and organizations make smart decisions faster. It's a marketing operating model that facilitates rapid optimization of the conversion funnel at all touchpoints across the customer life-cycle.

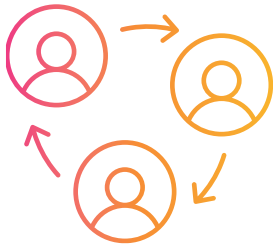
This mainly entails having cross-functional teams doing work in frequent iterations with continuous feedback. For Agile Marketing to 'work' (and not create chaos), it requires an overall strategic vision, as well as short, medium, and long-term horizon planning - not to mention the right technology to accommodate this way of working.

In contrast to the way marketing has been done traditionally, Agile Marketing shortens delivery cycles and creates feedback loops that inform continuous improvement.





In 2012, the *Agile Marketing Manifesto* was created to serve as a guide to help teams organize themselves and think about how they can operate with a more 'Agile' approach. Within the Manifesto, Agile Marketing values are outlined:



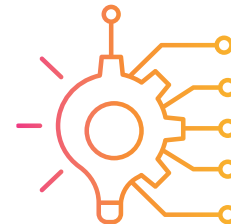
**Teamwork and collaboration
vs. silos and hierarchies**



**Focusing on customer value vs.
just the outputs**



**Delivering customer value early
and often vs. waiting for
perfection**



**Learning through data vs only
opinion**



**Rapid releases
to respond to change**

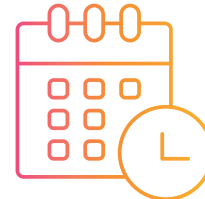
Benefits of Agile Marketing



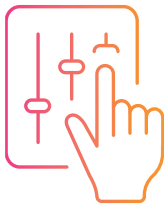
The benefits of Agile Marketing are real and become visible quickly - especially when applied to the major bottlenecks your team is currently experiencing.



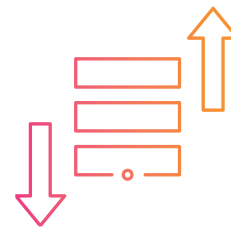
Do better work more quickly



Reduce missed deadlines



Adapt to changes in the market



Quickly prioritize successful tactics over 'scheduled plans'



Improve speed to market



The most significant benefit of Agile Marketing is improved speed to market. This is largely due to increased productivity and the ability to more easily change and prioritize work.

These changes play into org-chart refinement and structuring cross-functional teams into tribes or squads who are capable of owning a project from start to finish without having to 'hand off' a project. Ultimately a greater sense on connectivity is fostered, with the bottom line being, work is completed faster.

“ 50% of traditional marketers plan to adopt Agile within a year. ”

**53% Improved
Productivity**

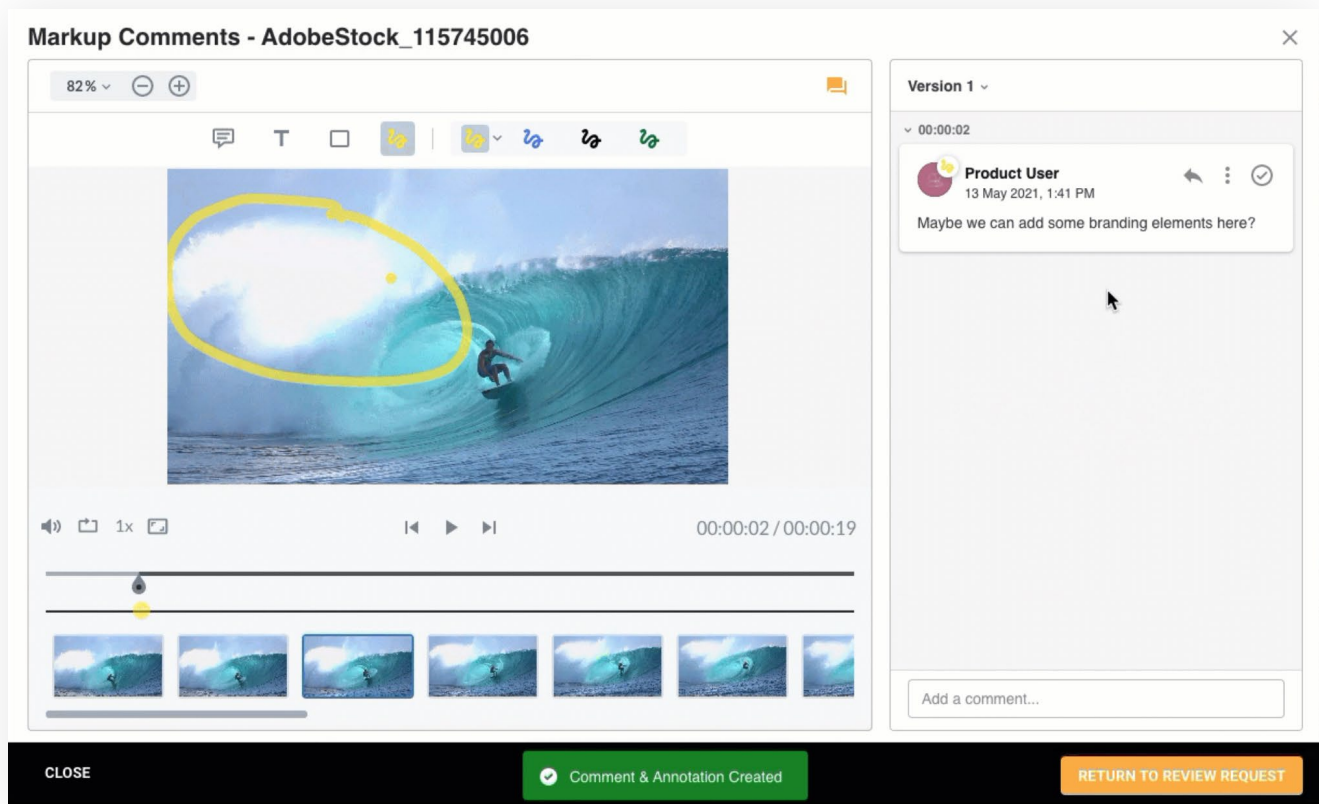
**45% Able to
pivot faster**

**42% Increased
Innovation**

**State of Agile Marketing Report - Coschedule + Agile Sherpas*

Smaller and more connected teams also make it easier to implement customer and market performance feedback. However, often times creative resources are external to the team, and having workflow approvals with online proofing is critical. Adopting technology that facilitates this type of broad inter-connection and increased work velocity that comes with an Agile way of working is critical.

“ Clients who use proofing are 9x more likely to adhere to marketing compliance requirements and get on-brand work out the door 2x faster. ”



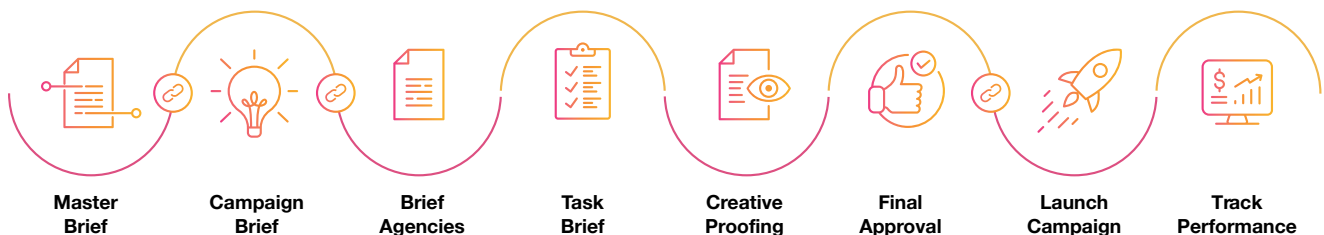
Building up and deploying new team structures and workflows must be coupled with the technology that is able to support these changes.

“ IntelligenceBank clients have reduced time to market by 50%. ”

Transparency and Collaboration

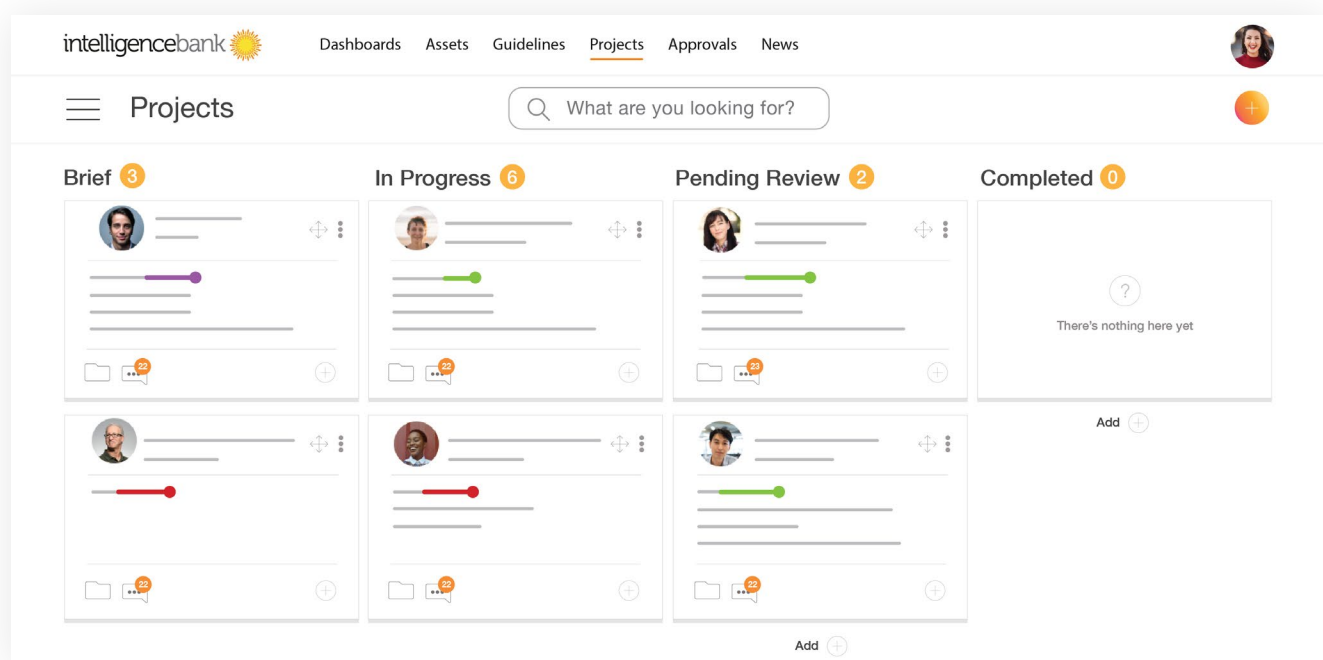


Another key benefit of Agile Marketing is that it aims to create visibility into a team's processes through visualized workflows and frequent touchpoints.



Instead of managing work in a complicated GANTT chart or spreadsheet that's hard to update and see what's going on, visualization tools and frequent check-ins help to drive collaboration and transparency.

Specifically, Agile Marketing relies on tools for visual management like an online Kanban Board that is reviewed, with tasks being re-prioritized daily in the form of short stand-ups.

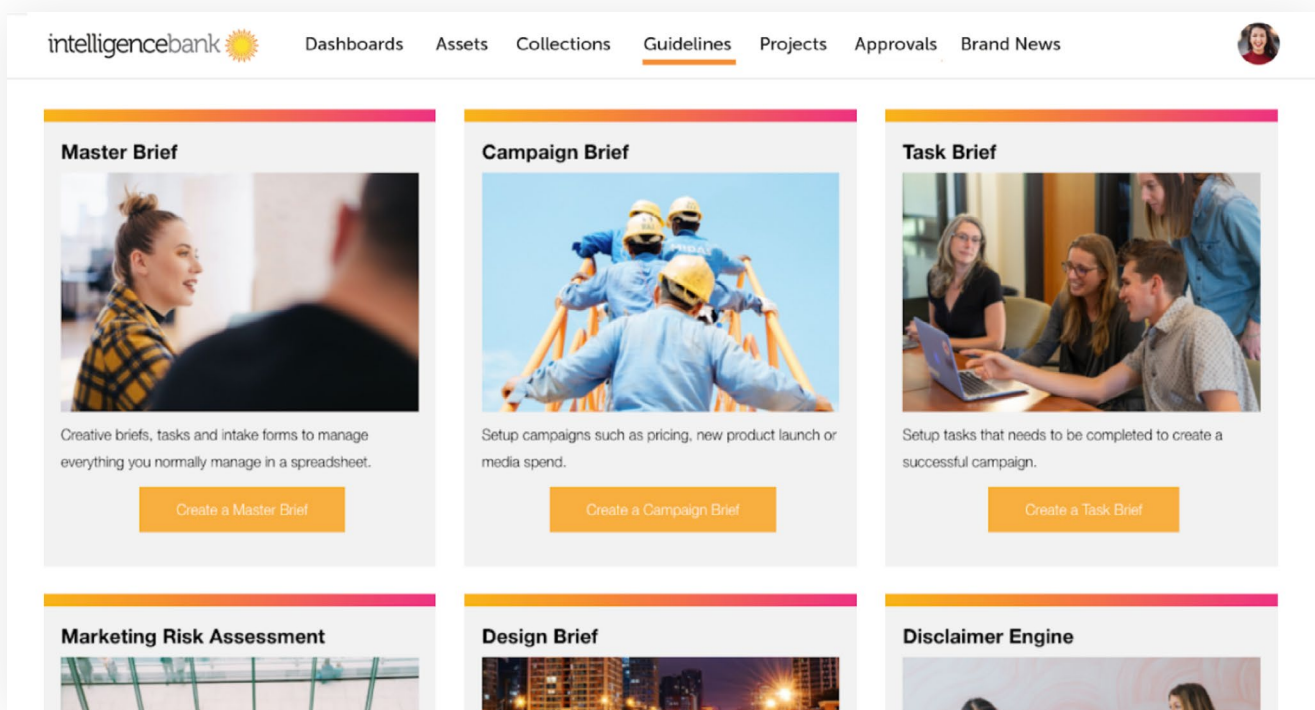


Flexibility



Flexibility is another important benefit of Agile Marketing, as it enables marketing teams to respond to market dynamics. Master briefs set the vision and strategy, while campaign briefs provide flexibility on tasks, priorities, resourcing, timelines and budget.

“ The way Agile Marketing teams achieve this by using IntelligenceBank is having a ‘master brief’ that is centrally approved which contains the overall strategy, customer insight and budget. From here, teams can create campaigns and tasks. ”



“ When Agile Marketing teams start with an approved master brief, generally speaking the number of campaigns and initiatives that live off the master brief rarely get rejected as the master strategy is aligned and teams can iterate and be flexible with initiatives that support the strategy. ”

John Ryan VP Marketing at IntelligenceBank

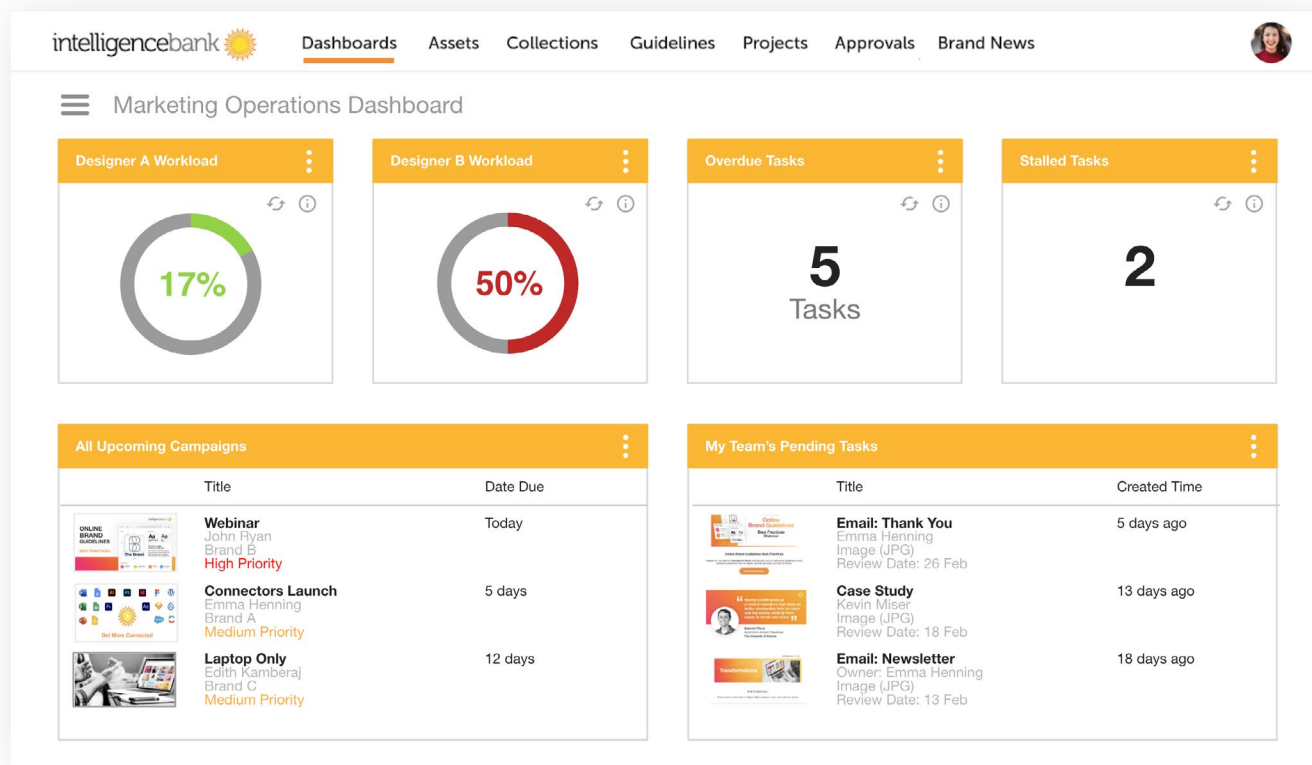


Data-driven marketing leads to higher rates of success

Agile's emphasis on collecting data and inputting ROI information into the continual iteration cycle is critical.

For marketing projects to be effective, teams should collect impact KPIs from each stage of a campaign which they can use to improve future initiatives. Digital A/B testing does this, but the results should be captured and managed centrally so all related teams can learn.

For example, IntelligenceBank clients use PIR (Post Implementation Review) forms to capture budgets vs actual, as well as activations or sales metrics vs target.

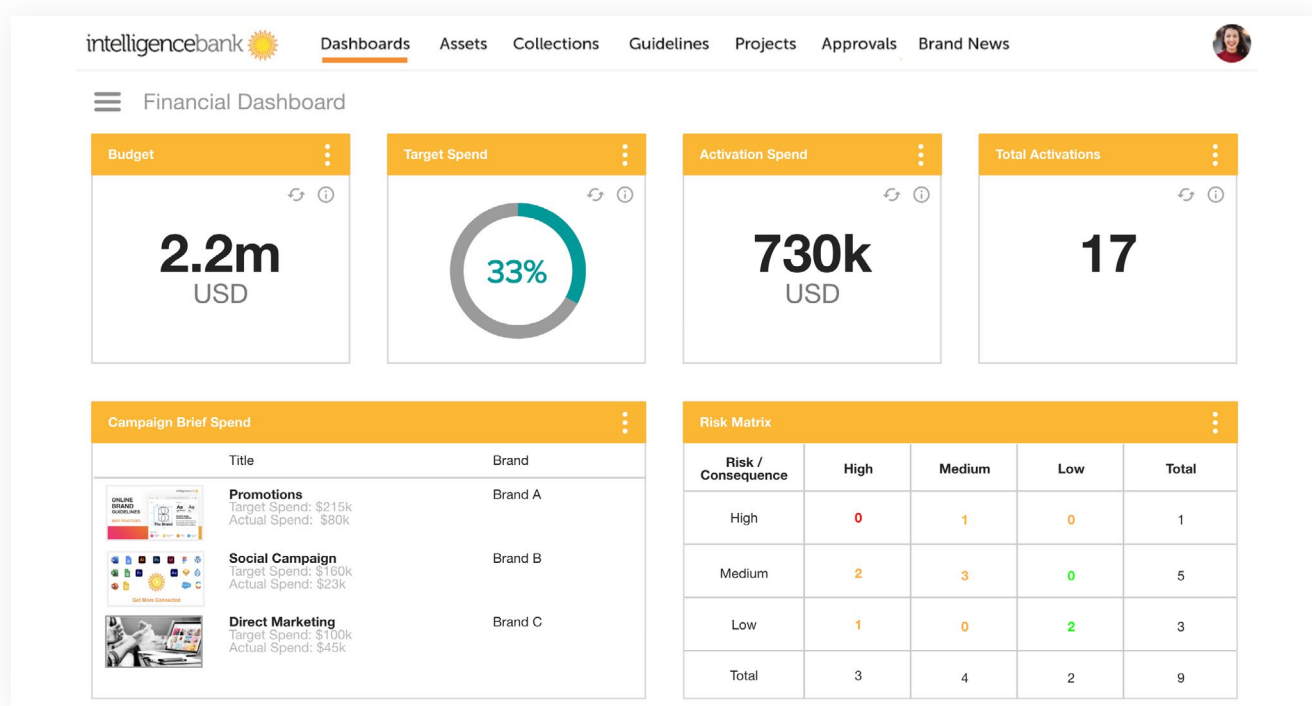




Feedback loops for continuous improvements

Since Agile fosters increased speed to market, it allows teams to adjust campaigns and re-allocate spend, based on data and market shifts - rather than committing to inflexible campaigns.

Being metrics driven helps to ensure that the lessons learned are applied to the next project, which ensures messaging and offers have a competitive edge and marketing ROI is maximized.



IntelligenceBank customers can easily see budget allocation against each project, and easily determine if spend needs to be adjusted.

“ IntelligenceBank is focused on providing software that facilitates end-to-end Agile Marketing to support content marketing planning and execution. ”



What about brands in regulated industries?



For brands in regulated industries such as Financial Services, Pharma, Government and Education, Agile seems impossible due to all the boxes that need checking before creative can be distributed. But with technology aiding the creative development process, it's easy.

Within briefs and tasks, you can link to an automated Disclaimer Engine to effectively democratize the responsibility of marketing compliance. While legal teams may still have to approve certain creative, IntelligenceBank clients reduce legal bottlenecks by having this capability locked into the briefing process.

The screenshot shows the 'New Creative Brief' interface in the IntelligenceBank system. The navigation bar includes 'Dashboards', 'Assets', 'Guidelines', 'Projects' (active), 'Approvals', and 'News'. A user profile icon is in the top right. The left sidebar has three options: 'Creative Brief', 'Disclaimer Decision Engine' (highlighted in orange), and 'Generate Disclaimer'. The main form area contains the following sections:

- Does the creative include an interest rate?**
 - ☐ No
 - ☒ Yes
 - > **What is the interest rate?**
5%
- Does the creative promise a % or \$ saving?**
 - ☐ No
 - ☒ Yes
 - > **What is the saving compared to**
A competitors product
 - > **Upload dated proof of competitors product**
Upload
- Where will this creative appear?**
 - Television X
 - Online Banners X

At the bottom, there are 'Cancel' and 'Generate Disclaimers' buttons.



The whole point of Agile Marketing is to give all contributors to a marketing project access to information about that project. This can include high-level creative direction of the campaign, down to the fine detail of the T&Cs and risk assessment of the project.

Access to all the information needed empowers all team members to move through their work without roadblocks.

The screenshot shows the 'Risk Assessment' form within the Intelligence Bank application. The top navigation bar includes 'Dashboards', 'Assets', 'Guidelines', 'Projects' (which is underlined), 'Approvals', and 'News'. A user profile icon is visible in the top right. The main header of the form is 'Risk Assessment' with a small orange plus icon. On the left, there is a sidebar with two tabs: 'Brief Details' and 'Risk Assessment' (which is highlighted with an orange-to-yellow gradient). The main content area contains the following fields and instructions:

- A message: 'A risk score will be created when the record is created on submit'
- 'Creative Brief Name:' followed by a text input field containing 'Product A digital Display Banners'
- 'Is this creative for a new product?' followed by a dropdown menu with 'Yes' selected
- 'Does this creative include pricing?' followed by a dropdown menu with 'Yes' selected
- 'Is the budget for this project over \$5,000?' followed by a dropdown menu with 'No' selected
- 'Where will this creative be distributed?' followed by a text input field containing 'Digital Display'
- At the bottom, there are three buttons: 'Cancel', 'Next' (disabled), and 'Submit' (orange).

Changing processes and team structure is one thing - but having the technology that facilitates this inter-operability is what will super-charge Agile Marketing methodology.



How to get started with Agile Marketing?



Learn about how IntelligenceBank's Marketing Operations Platform can support your journey.

Whether you are considering Agile Marketing or you have already made a start, speak to an expert member of our team to see how IntelligenceBank makes marketing operations seamless and how our tools and feature capabilities can help you.

IntelligenceBank features to super-charge for Agile Marketing adoption:

- Set the overall creative strategy with a Master Campaign Brief where the business case and budgets are approved.
- Use online Creative Workflows and Approvals with Proofing and Markups to collaborate in real time.
- Visualize and prioritize campaigns, tasks and initiatives in a kanban board so there is transparency and flexibility.
- Consolidate all final creative assets in a centralized DAM so they can be repurposed by multiple teams.

“ IntelligenceBank Marketing Operations Platform (MOPs) allows marketing teams to transform ideas into marketing campaigns in days, not weeks. ”

Do you want to learn more?



At IntelligenceBank, our mission is to provide an effective and tailored solution for organizations. That's why we work closely with our clients to scope out exactly what their needs are, for an Agile world or otherwise.

We empower teams and ensure digital assets and marketing projects are consistently well-managed across the depth and breadth of an organisation.

We all know that the strength of a brand comes from the quality and consistency of how their marketing team operates. If you would like to know how you can elevate your team to an Agile way of working using our **Marketing Operations**, **BrandHub** and **Digital Asset Management** platform, reach out to one of our experts, we have offices globally.



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