media
brands that ask for shared
coverage
earned media
organic
Market & Sell
Support & Serve
Need
Recieve
Use
time
completion
detailed design complete
present
dependency
initiative
do
flow
O
P
Q
R
S
emotion
high
med
low
feasability
User Feedabck
cost
E-Book
EMail
Video
Interactive
CPO
CMO
web analytics
marketing automation
best features
Water

ROLAND SMART

THE AGILE MARKETER

TURNING CUSTOMER EXPERIENCE INTO YOUR COMPETITIVE ADVANTAGE

WILEY

THE AGILE MARKETER

TURNING CUSTOMER EXPERIENCE INTO YOUR COMPETITIVE ADVANTAGE

ROLAND SMART

WILEY

This book is printed on acid-free paper. ♾

Copyright © 2016 by Roland Smart. All rights reserved

Published by John Wiley & Sons, Inc., Hoboken, New Jersey
Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600, or on the web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor the author shall be liable for damages arising herefrom.

For general information about our other products and services, please contact our Customer Care Department within the United States at (800) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at http://booksupport.wiley.com. For more information about Wiley products, visit www.wiley.com.

Library of Congress Cataloging-in-Publication Data is on File:

9781119223009 (hbk)
9781119223016 (ePDF)
9781119223030 (epub)

Cover Design: Wiley
Cover Image: Roland Smart

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

Preface

The goal of this book is to share some of what I've learned from my own journey as a marketer. My motivation stems from the fact that some of my greatest insights have come from books that I've read while learning my trade in the trenches. Books like *Competitive Advantage*, *Innovation and Entrepreneurship, The Cluetrain Manifesto*, *The Innovator's Dilemma, Crossing the Chasm, Predictably Irrational*, *The Lean Startup*, and *Digital Body Language*—to name a few—made me stop and reevaluate how to approach my work. Sometimes they even took me in a completely new direction that proved rewarding. I've applied the insights from these readings over the years in ventures that succeeded and ventures that failed. Throughout my journey, I've been exposed to just about every aspect of marketing. I've also been fortunate to work at companies where I could balance my interest in marketing and product design with my broader interest in entrepreneurialism and business. This explains why I've grown to be a product-oriented marketer who appreciates and embraces contemporary innovation practices.

My interest in marketing technology started in earnest when I joined a consumer packaged goods company as its first employee. Adina was founded and managed by a successful entrepreneur, Greg Steltenpohl, whose previous company, Odwalla, was acquired by The Coca-Cola Company. For three years, I worked with him running the marketing group. We launched three products into national distribution as social marketing became a thing.

After moving to the San Francisco Bay Area to join Adina full time, I quickly became immersed in the marketing technology community. I joined a remarkable user experience (UX) design firm named Adaptive Path (which has since been acquired by Capital One). Adaptive Path was working on some of the most cutting-edge social technologies on behalf of such clients as Flickr, MySpace, and Nokia. Though Adaptive Path specialized in UX design, I probably learned more about marketing there than at any other place I've worked. That's because the company was laser-focused on improving the process by which companies develop products and services with customer experience in mind. Though I did not know this at the time, these same approaches would ultimately transform my view of marketing.

Later I joined Sprout, the first of two marketing technology start-ups where I would be responsible for leading the marketing group. Sprout was acquired by InMobi, at the time the largest independent mobile advertising network. The second company, Involver, was acquired by Oracle, where I am currently the VP of Social and Community Marketing.

Much of my work today centers on the Oracle Technology Network, but I am also part of a cohort of marketers who are focused on modernizing Oracle's own marketing platform with many of the scores of technologies we have acquired, including Eloqua, Responsys, BlueKai, Compendium, Vitrue, and Involver.

It's in this capacity that I've been exposed to the enormity of the challenge that marketers face today. The marketing technology industry is going through a tremendous cycle of innovation. New technologies have yielded unprecedented business value based on deeper insights into customer behavior, but the speed and volume of innovation has also spawned new problems: data fragmentation, platform/product overlap and integration overhead, as well as challenges to management structures and traditional organizational norms.

My hope is that this book will help you overcome some of these challenges in your efforts to modernize your marketing practices and the platforms that support them. Part 1 explains why and how the adaptive development approaches used by development organizations are driving change in the marketer's world. Part 2 examines these approaches in detail and how they work in a marketing context. In Part 3, we explore how adaptive approaches can be integrated with traditional marketing practices, how they change relationships across the C-suite, and how they ultimately lead to better internal alignment. Finally, Part 4 focuses on what modern marketing looks like in practice, how it changes the relationship between the company and its community of customers, and how it uniquely positions marketers as the steward of customer experience.

In short, *The Agile Marketer* presents ideas to help marketers create a new culture to meet the imperatives of modern marketing. Let me emphasize up

此为试读，需要完整PDF请访问：www.ertongbook.com

front that this book is not intended to be a comprehensive guide to implementation. Such a book would be nearly impossible to write, given how company-specific the cultural transformation that implementation requires must be. But herein you will find numerous examples of the kinds of strategies and tactics that you'd expect to implement as part of a transformation, regardless of your industry, the nature of your organization, or the maturity of your current marketing practice. I hope these ideas help make your journey productive and successful.

Roland Smart
September 2015

Acknowledgments

Many marketers provided feedback on this book during its development. For the last year it has been evolving as a shared document with more than 25 collaborators logging in to comment, suggest changes, and make edits. In this way, it's fair to say the book has been developed using an Agile process.

Oracle deserves recognition for its support of this project and for making internal teams and customers available to participate. Beyond this access, my colleagues at Oracle have inspired me—and challenged me—to expand my thinking about how to apply an approach that was pioneered at smaller companies inside the enterprise. Their willingness to grapple with these ideas, provide feedback, and share insights has demonstrably improved this book.

I also had the great fortune of working with a talented editor, Jan Koch, whose efforts went well beyond editing.

Finally, a heartfelt thanks to my wife, Alicia Smart, for her support and encouragement throughout this project.

THE AGILE MARKETER

Contents

Preface ix

Acknowledgments xiii

I How Development Methods Influence Marketing 1

1 Why Marketing Needs to Adapt 3

Why do marketers need a new approach to marketing? Because traditional approaches fail to address contemporary consumer expectations. Two high-profile companies provide starkly contrasting case studies that demonstrate the importance of aligning innovation and marketing teams with "adaptive" development practices.

2 The Modern Marketer's Challenge 13

How can marketers modernize their practices in today's complex and rapidly evolving marketing-technology landscape? By emulating and collaborating with developers. Plus, how successful point solutions fueled the vision of an integrated marketing platform.

3 Scaling Sales: Marketing and the Role of Automation 21

How can the marketing function use technology to scale sales? An increasingly self-directed buyer's journey requires companies to influence buyers long before they reach out to the sales team. An adaptive approach to automation can help, but not before aligning sales with marketing (so sales is free to focus on the highest-value opportunities).

4 The Rise of Agile 29

To understand what makes the "adaptive" approach to automation more effective, you must be familiar with the Agile Manifesto. This simple document establishes core values and principles underlying an adaptive approach to development. Here, we look at how Agile differs from traditional approaches, when it provides a competitive advantage, and when it's appropriate to adopt it.

II Adaptive Methods for Modernizing Marketing 41

5 A Snapshot of Leading Methods 43
Which adaptive methods are relevant to marketers? Some methods are better than others for your initiative. Success requires tailoring your method to your, project, team culture and company culture.

6 The Skinny on Scrum 45
How does Scrum work, and how can it be applied to marketing? A thorough review of Scrum fundamentals to support a deeper understand of Agile. Plus, insight into how Scrum teams are organized and their most common practices.

7 Kanban: Lean Meets Agile 53
How is Kanban different than Scrum? More important, what is it good for? An overview of Kanban's origins and an explication of how Kanban leverages Scrum practices while operating under a different primary constraint. Why Kanban is often the best Agile practice for marketers and how methods can be combined.

8 Implementing Agile: Key Considerations 63
How do you plan for an Agile implementation? Four key considerations as you prepare for your Agile implementation. Plus, thoughts on C-Suite partnerships, the role of the Agile coach, your choice of methods, and setting expectations about timing and progress.

9 Implementing Agile: Common Objections 75
What questions should you expect to hear from detractors? (I have an inkling: "It doesn't scale," "it will be disputive," "you can't plan ahead," and "you can't budget.") Here's what you need to know to address these questions before they arise.

10 Your North Star: The Agile Marketing Manifesto 81
How do you keep your Agile practice on track? The Agile Marketing Manifesto is a key resource that translates the Agile Manifesto for marketers' needs. Plus, a review of Agile in action, with examples for marketers; and insights on Agile design, Agile content creation, and Agile system development.

III Linking Innovation and Customer Experience 87

11 Integrating Marketing and Innovation with Agile 89
How does Agile support marketing's collaboration with the innovation team? Teams that share practices are easier to align in everything from product

strategy and UX to communications. Learn how Agile practices are increasingly becoming a platform for engagement between all facets of product management and marketing.

12 Beyond Agile: More Methods to Link Marketing and Product Management with Innovation 97

Who owns innovation? The practice of innovation is broader than Agile practice and represents an opportunity for marketing and product management to collaborate. Two exercises provide a framework for defining which groups "own" the inputs to the innovation process.

13 Beyond Agile: Marketing's Role in the Customer Experience 109

Who owns the customer experience? Different groups may own different parts of the customer experience, but marketers are uniquely positioned to map and measure it. Learn how marketing driven research programs and psychology provide insights into opportunities that would be overlooked from a purely Agile perspective.

IV Modern Marketing and the Customer Experience 121

14 From Deeper Customer Relationship to Richer Customer Experience 123

How does the customer relationship change as companies modernize their marketing function? When customers help design the product, more opportunities arise for them to advocate for it. (Incidentally, they are ultimately advocating for your culture as much as they are for your product or service.)

15 Growth Hacking 125

What if the product was also the marketing? A case study illustrates how the freemium model is both a product and a marketing service. Also, how to leverage gamification to support the marketing of your products.

16 Lessons from the Collaborative Economy 139

Can your community also be your competitive advantage? More and more companies are using the crowd to disrupt markets, and marketplace-based business models are disrupting many industries. The so-called collaborative economy, in which both customers as well as external providers actively shape the product (or service), is now passing an inflection point. Established businesses must consider either how to become "crowd companies" or adopt crowd practices to advance their products and services.

此为试读，需要完整PDF请访问：www.ertongbook.com

Conclusion: The Steward of Customer Experience 151

How does modernization lead to the stewardship of customer experience? As keepers of the most foundational customer information source -the customer database- marketers are singularly positioned to be the steward of customer experience. Data helps us read the customer's digital body language, understand how customers respond to every touchpoint, and determine how the customer experience should be managed. Here, we revisit the customer lifecycle model, exploring its connection to the customer database. A case study on Oracle's approach to managing the customer lifecycle illustrates what a marketing modernization program looks like (admittedly in one of the most complex business environments imaginable).

Appendix 1 Content Marketing: An Agile Approach 165

How does the Agile approach apply to content marketing? We present a framework for running an Agile content marketing team, including a series of exercises to get started developing your content strategy.

Appendix 2 The Product Manager's Perspective on Agile Marketing 183

What do product managers think about the adoption of Agile on the marketing side of the house? Interviews with product management leaders offer insights on the changing relationship between product management and marketing—and how product management can foster alignment with marketing.

Resources 197

Endnotes 199

About the Author 207

Index 209

How Development Methods Influence Marketing

1

Why Marketing Needs to Adapt

Why do marketers need a new approach?

With the rise of social media, marketers entered an era of heightened exposure in which any kind of product or brand failure has the potential to echo virally and at lightning speed through the marketplace. This vulnerability has intensified the pressure on companies to treat customers better and to share information with them in a more transparent manner. And the information sharing has evolved to include the active solicitation of feedback to incorporate at increasingly earlier stages of the product cycle. Many refer to this period as the "age of the empowered customer." In this book I'll explain how it's also poised to be an "age of the marketer."

This heightened exposure has certainly benefited the customer, but it has also benefited those companies that have organized themselves to harness customer feedback to quickly improve their products and services. Those companies that can meet and exceed customer expectations (that is, create a great customer experience) have a competitive advantage. Because marketers play a critical role as a conduit between the customer and the company, they are positioned to have a greater role in the business than ever before. In fact, if they get it right, they have an opportunity to serve as the steward of the overall customer experience.

Many marketers are starting to recognize this possibility. But few would claim to be close to achieving this stewardship role. The truth is, there are far more companies that don't get it right. If anything, they are undermining the customer experience. But let's consider for a moment what kinds of customer experiences trigger criticism and harsh responses. No doubt some of these examples will ring a bell for you:

- The company whose software you use to organize your photos does a major relaunch of its site with no warning, and suddenly you can't find all of your photos. You visit their community to find that many users are having the same issue, but no one seems to have a definitive answer on how the new system works.
- You buy a product from the manufacturer, only to have one of its retailers offer you the same product at a discount a week later. You e-mail customer support; they are unaware of the promotion and unwilling to offer you a refund.
- You reach out for customer support on Twitter, go through the process of mutual "following" so that you can direct-message and then explain the issue, only to get redirected to another channel where you have to start all over again.
- You research a product online and find some great reviews, but you've also spotted some dismal ones, and the company has not responded to the concerns. You reach out on social media to hear from the company, but they don't respond.
- You visit an online clothing retailer and browse its entire sweater catalog. The company follows up with a series of e-mails containing offers, but none are for sweaters. You then pass by one of the company's retail stores on your way to work and discover that there was a storewide sale over the weekend.
- You call one of your phone service provider's retail locations to ask if it does handset exchanges in-store. The representative says "yes" and tells you to come over, but when you arrive you discover there's an hour wait for service. The clerk asks for your phone number but then tells you that you have to stay in the store in order to keep your appointment. When your turn finally comes up, the clerk informs you that in-store exchanges are subject to a restocking fee that does not apply to online exchanges.

Every one of these examples is the result of a failure that is due—at least in part—to marketing platforms and practices that have not kept pace with innovation and customer expectations. They represent a disconnect between marketing and the group responsible for developing the product or service. None of these, moreover, is a small failure, because even a single poor customer experience can do long-lasting harm to the company's reputation (especially if you haven't delivered a particularly great experience in the same period). What's more, within every one of these examples there are many opportunities for the company to deliver a consistent and great experience that could differentiate it and establish loyalty.

These are hardly isolated examples. Many companies suffer from these same flaws. Comcast is frequently held up as a poster child for customer complaints—complaints over customer service, billing practices, and the customer experience on its websites. In fact, so long is the list of complaints that there's even a Twitter hashtag—#comcastoutrage—where the disgruntled can vent. At the heart of the complaints is frustration over Comcast's approach to its core service: The company forces customers to buy services in bundles that include many items that they simply don't want. Granted this can be an effective way to get customers to try new content, but Comcast has taken it to such an extreme that it actually infuriates customers.

The fact is that Comcast's approach has for years been out of sync with the market's direction. And that is why services like HBO diversified and joined forces with younger Comcast competitors that are allowing customers to buy just what they want, when they want it.

An empowered marketing organization that was aligned with the rest of the company would have early on recognized this as a problem with the marketing mix (in this case, the mix of products and prices). It would have engaged with the core service team to address it. In companies where marketing is disconnected, marketing is relegated to amplifying the success of good products—which often don't need much help—or doing damage control by spinning the facts in the best possible light (if the product is bad). Either represents a reactive, if not impoverished, approach to marketing from which the stewardship of customer experience is out of reach.

To put this in perspective, consider that just 30 years ago, we were still living in the so-called broadcast era of marketing, when brand perception could be managed quite effectively by marketers. Then, innovation was often driven by marketing, and product development had less influence; it was there to execute. Companies could get away with this approach because consumers had little ability to share their experiences freely or amplify their voices above the companies' megaphones. So companies faced less pressure to improve their products and services. On top of this, the broadcast system

此为试读，需要完整PDF请访问：www.ertongbook.com