



# Creating an Agile, Data-Driven Marketing Team



# AGENDA

1. Measuring & Analyzing Marketing
2. Communicating & Presenting with Data
3. Operating an Agile Marketing Team
4. Managing an Agile, Data-Driven Marketing Team



# 1 MEASURING & ANALYZING MARKETING



**“YOU CAN’T MANAGE WHAT  
YOU DON’T MEASURE.”**

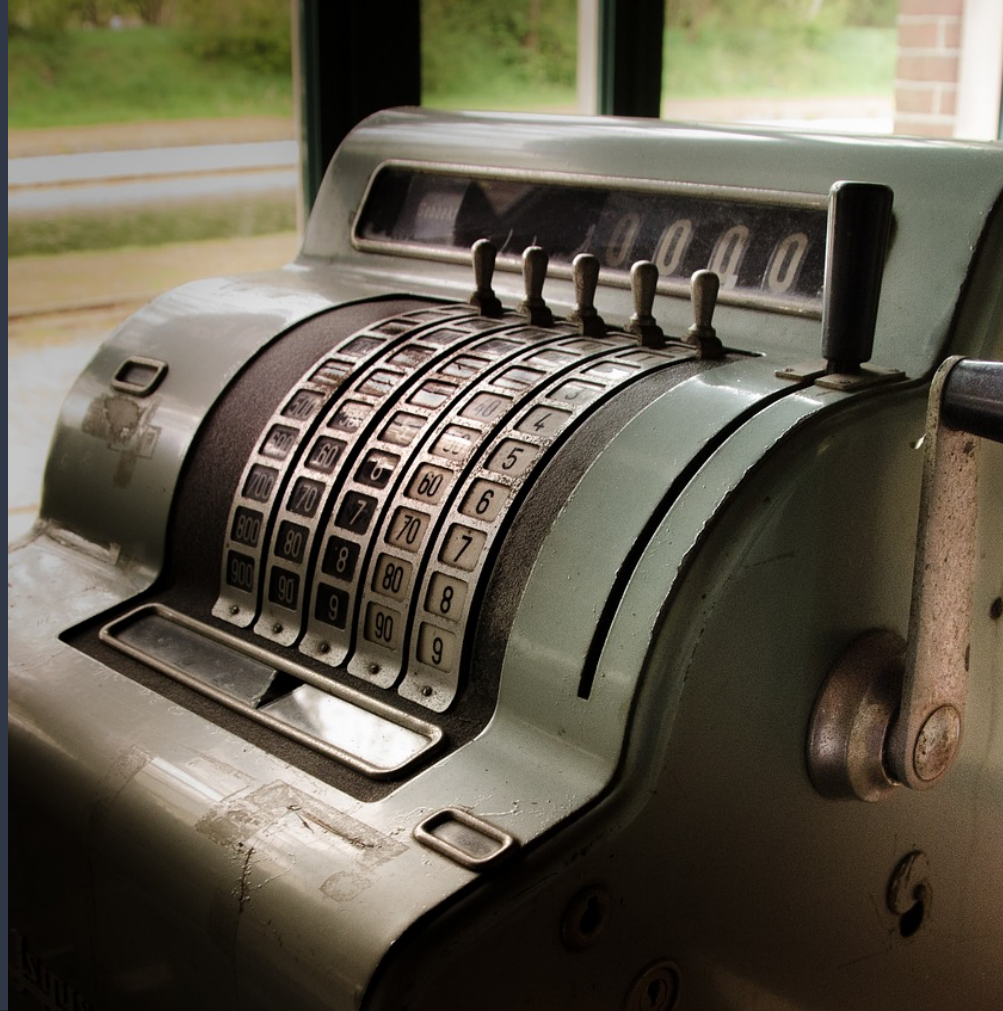
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A collection of vintage tools is laid out on a dark wooden surface. The tools include a large axe with a wooden handle, a claw hammer, a pair of yellow leather work gloves, a pair of large metal pliers, a small folding knife, a circular metal object with a logo, a metal spring, and a curved metal tool. The scene is lit from the left, creating a strong shadow.

# DATA IS A TOOL

# Align with Key Goals

Align Marketing with one of the company's main goals: building the product or selling it.







## Work Backwards

Use historic conversion rates to back into marketing goals.

Goal: 100 new customers

50% average opportunity close rate

= 200 opportunities

40% average lead conversion rate

= 500 new leads

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# Set SMART Goals

Specific  
Measurable  
Attainable  
Realistic  
Timeframe



# Keep it Simple

Choose simple and clear metrics. There should be a direct path from your goal to the company's.



# TWO KINDS OF ANALYSIS

1. DID WE HIT OUR GOALS?

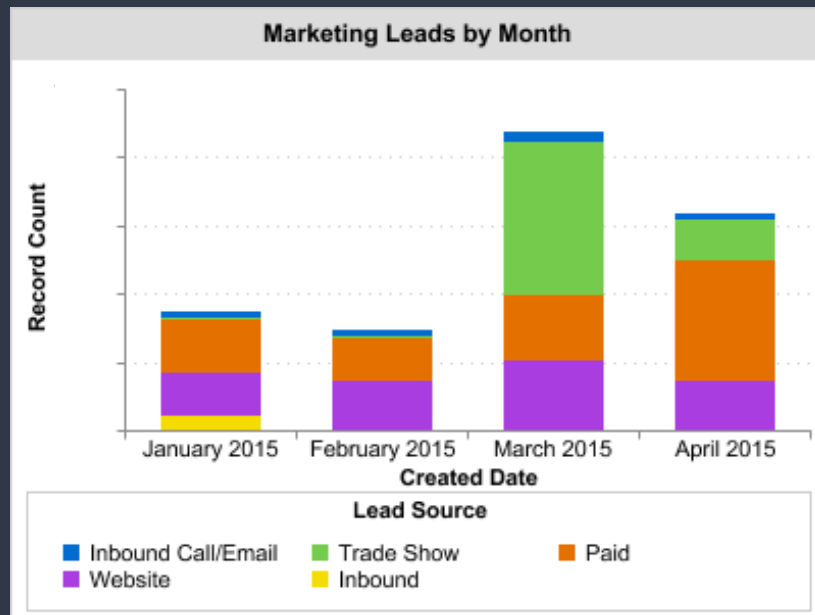
2. WHY OR WHY NOT?



# DID WE HIT OUR GOALS?



# WHY OR WHY NOT?





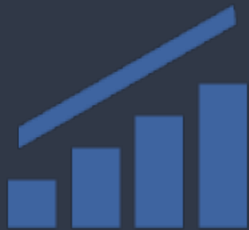
# FOCUS ON THE QUESTION

Which channels should we invest in?

Which programs should we cut?

What can we learn from the most effective programs to apply to others?

# ACTIVE VS. PASSIVE ANALYSIS



VS.







# FOCUS ON TRENDS

## TOOLS & DATA HYGIENE

only matter as far as they help you  
get an answer to your question.

# 2 COMMUNICATING & PRESENTING WITH DATA

A close-up photograph of a hand holding a silver, ribbed metal can. In the background, a person's mouth is wide open in a shout or yell. A dark grey horizontal band is superimposed over the middle of the image, containing the text 'DATA IS A UNIVERSAL LANGUAGE' in white, bold, sans-serif capital letters.

**DATA IS A UNIVERSAL LANGUAGE**

A person's hands are holding a smartphone horizontally, capturing a photo of a bokeh light background. The phone's screen shows a preview of the scene, which is a long hallway with a glass ceiling and many small lights. The background of the entire image is a dense field of out-of-focus, circular light spots in warm yellow and cool purple tones.

**USE DATA TO FOCUS & PRIORITIZE**

A decorative bokeh effect on the left side of the slide, featuring a vertical line of small, bright, multi-colored dots (orange, purple, blue) that transition into larger, out-of-focus circles of similar colors. The background is a dark blue gradient.

# 7

THINGS MARKETERS  
DO **WRONG** WHEN  
COMMUNICATING  
RESULTS TO THEIR CEO



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# #1

## NOT SHOWING METRICS





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#2

## GETTING INTO THE WEEDS



#3

NOT DRAWING  
CONCLUSIONS





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#4

NOT FOCUSING ON THE  
RIGHT METRICS



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#5

SHOWING TOO MUCH



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#6

NOT ANTICIPATING  
QUESTIONS





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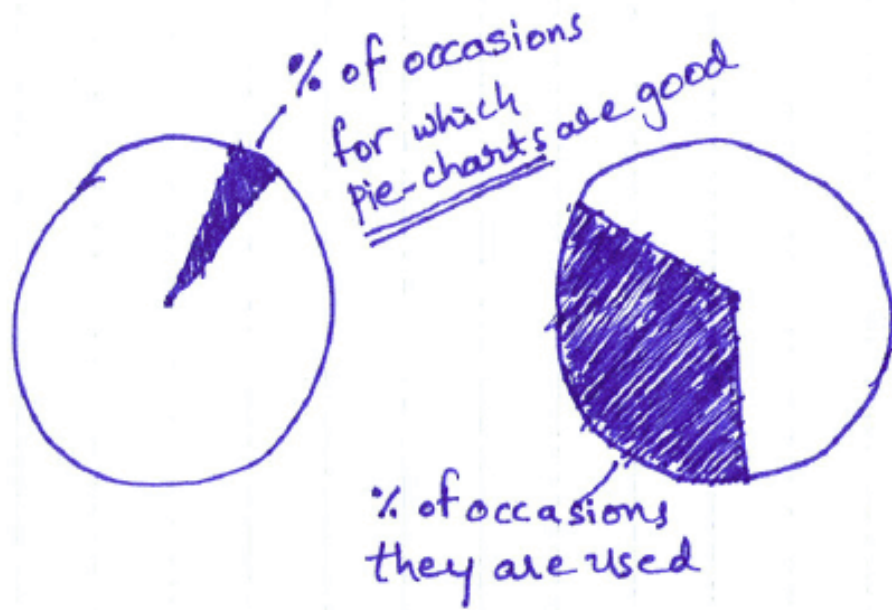
#7

TAKING TOO LONG TO  
GET TO THE POINT



# 4

## VISUAL PRESENTATION TIPS FOR COMMUNICATING WITH DATA



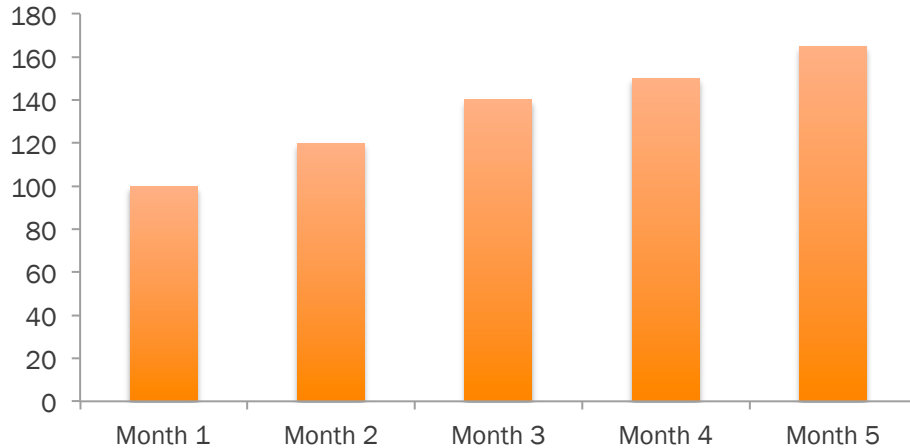
#1

NO MORE PIE CHARTS

SOURCE: CHANDOO.ORG



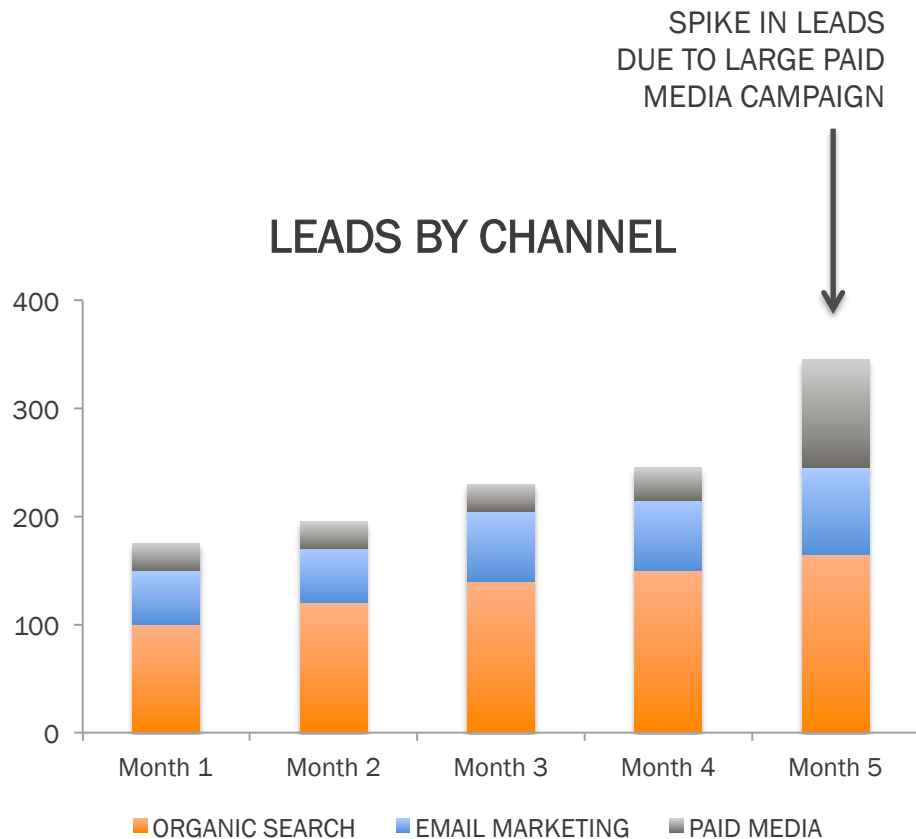
## EXAMPLE CHART



#2

CUT OUT THE  
DISTRACTIONS

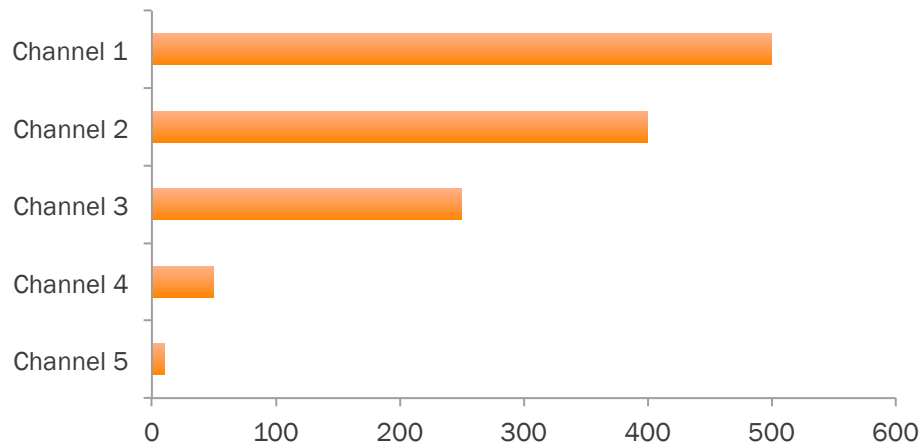
## LEADS BY CHANNEL



#3

HIGHLIGHT YOUR POINT

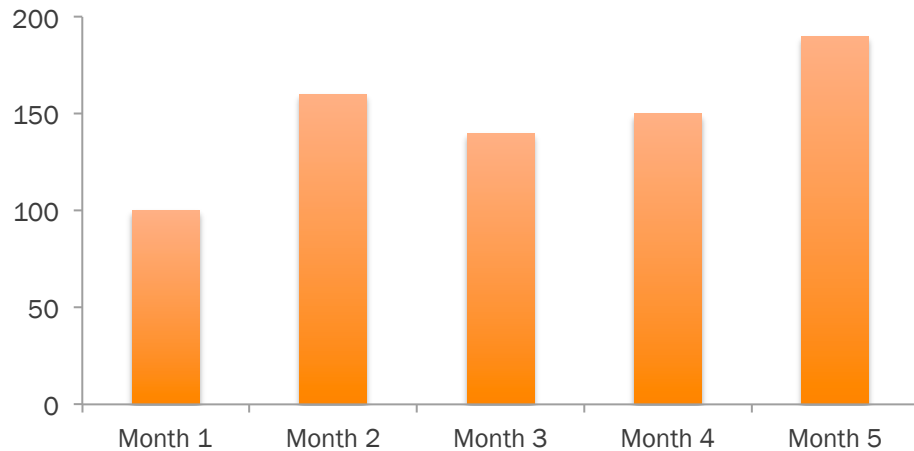
## Leads by Channel This Quarter



#4

USE EXPECTED  
STANDARDS

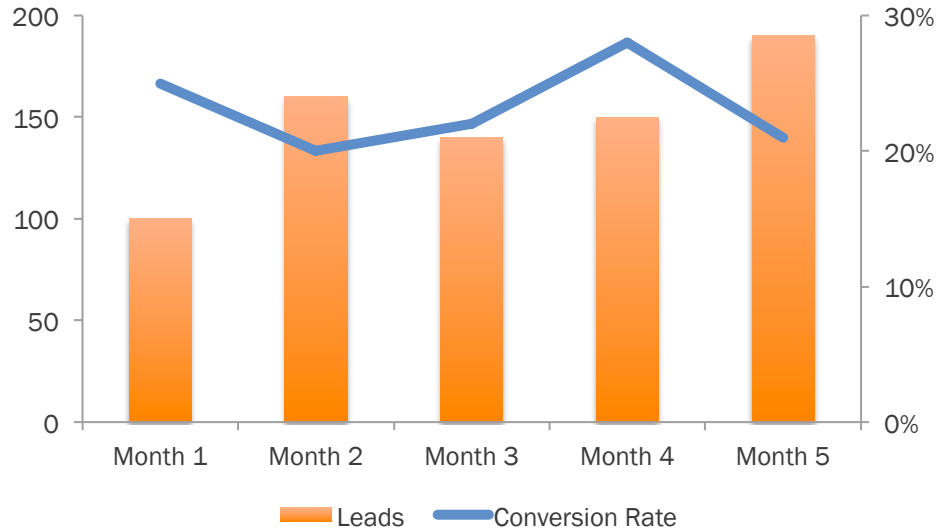
Leads by Month



#4

USE EXPECTED  
STANDARDS

Leads by Month with Conversion Rate



#4

USE EXPECTED  
STANDARDS

# 3

## OPERATING AN AGILE MARKETING TEAM



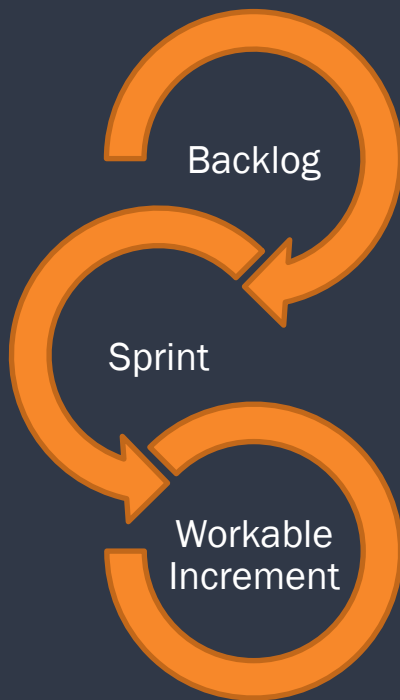
A decorative bokeh effect consisting of numerous overlapping circles in shades of orange, purple, and blue, located on the left side of the slide.

# AGILE

adj.

quick and well-coordinated  
movement

# SCRUM PROCESS



# SCRUM TEAM



## PRODUCT OWNER

Responsible for maintaining the backlog and representing the interests of various stakeholders.

## SCRUM MASTER

Tasked with keeping the team on track to reach its sprint goals, removing blockers and helping with coordination.



## TEAM

A cross-functional group of people responsible for managing itself to develop the product.

# BACKLOG



# USER STORY

PRIORITY	USER STORY	SUCCESS CRITERIA	OWNER	POINTS
List stories in order of priority (1, 2, 3, etc.).	<p>A specific description of the task, written in the form of the benefit to the stakeholder. e.g. “As a ____ (stakeholder), I want to ____ (task), so that I can ____ (desired result).”</p> <ul style="list-style-type: none"><li>• List out the details ahead of time,</li><li>• Thinking through each step necessary</li></ul>	Note the measurable result, so that you know when the story is officially completed.	Name the people on the project.	Points are a measure of the project difficulty.

# PLANNING POKER

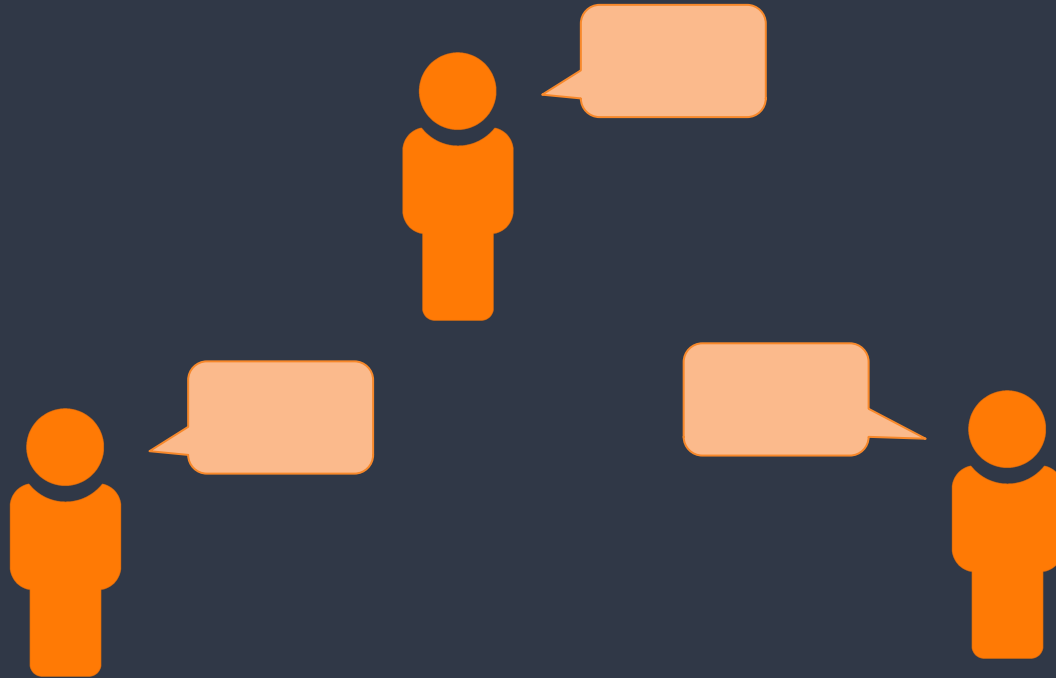
0	$\frac{1}{2}$	1	2	3
5	8	13	20	40



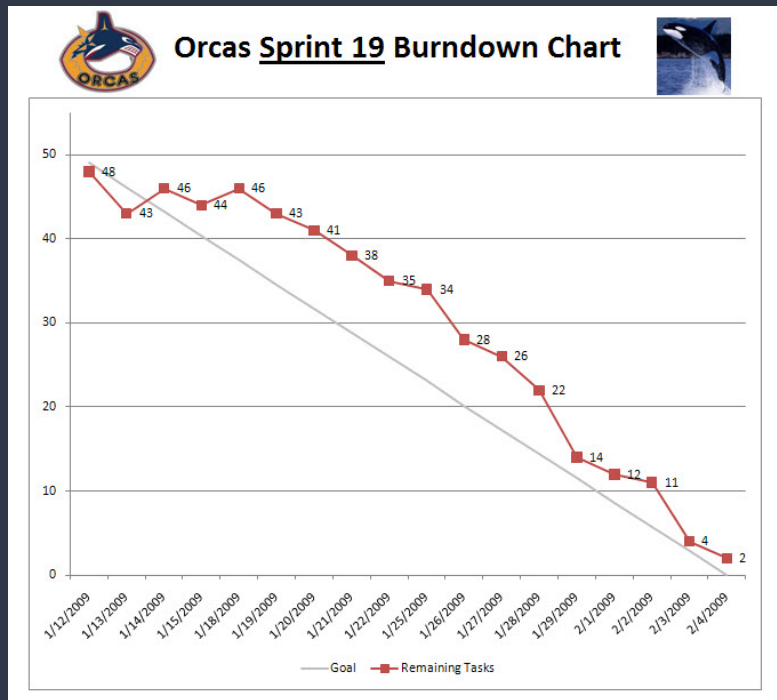
# PUBLIC COMMITMENT



# DAILY STANDUP



# SPRINT REPORTING



# SPRINT REVIEW

- ☐ Execution vs. Commitment
- ☐ Wins
- ☐ Losses
- ☐ Lessons



# 4

## KEY **ADVANTAGES** OF AGILE MARKETING



**MOVE FAST**



STAY FOCUSED



A close-up, vertical photograph of a dartboard. Several darts are embedded in the board, with their metallic barrels and black flights visible. The flights have a colorful, iridescent pattern. The background is a solid dark blue. A semi-transparent dark grey rectangle is positioned in the upper right, containing the text 'PRIORITIZE CLEARLY' in white.

**PRIORITIZE CLEARLY**



# PREDICT RESULTS



# 3

## KEY DISADVANTAGES OF THE AGILE METHOD



# OVERHEAD

Cut down on it. Meetings,  
planning, reporting.  
Consider the impact of  
sprint cycle length, too.



# SHORT-TERM

Having trouble combining agile and large-scale projects? Break them down into small chunks.





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# CULTURE SHOCK

Team not used to agile?  
Introduce it slowly – first  
sprint commitment, then  
planning poker, etc.





# 6

## KEY STEPS TO **ADAPT** AGILE FOR MARKETING TEAMS



# SPRINT CYCLE

Choose a sprint cycle tied to company cycles (e.g. sales quotas, product development sprints).



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# LIGHT GROOMING

Things change too quickly to have a fully flushed out backlog. But light grooming will allow you move faster when you're ready to take on new projects.



# EXTRA REPORTING

Skip the pieces that don't resonate with your team

- points, burndown, etc.





# RETROSPECTIVE

Keep the end-of-sprint review, with the opportunity for everyone to self-evaluate.



## SIMPLE TOOLS

You don't need fancy tools to implement agile  
– try Google Docs, Trello, or Asana.



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# SPECIALIZATION

While cross-training allows anyone to take on top projects, it's helpful to have different specialties represented on the team.



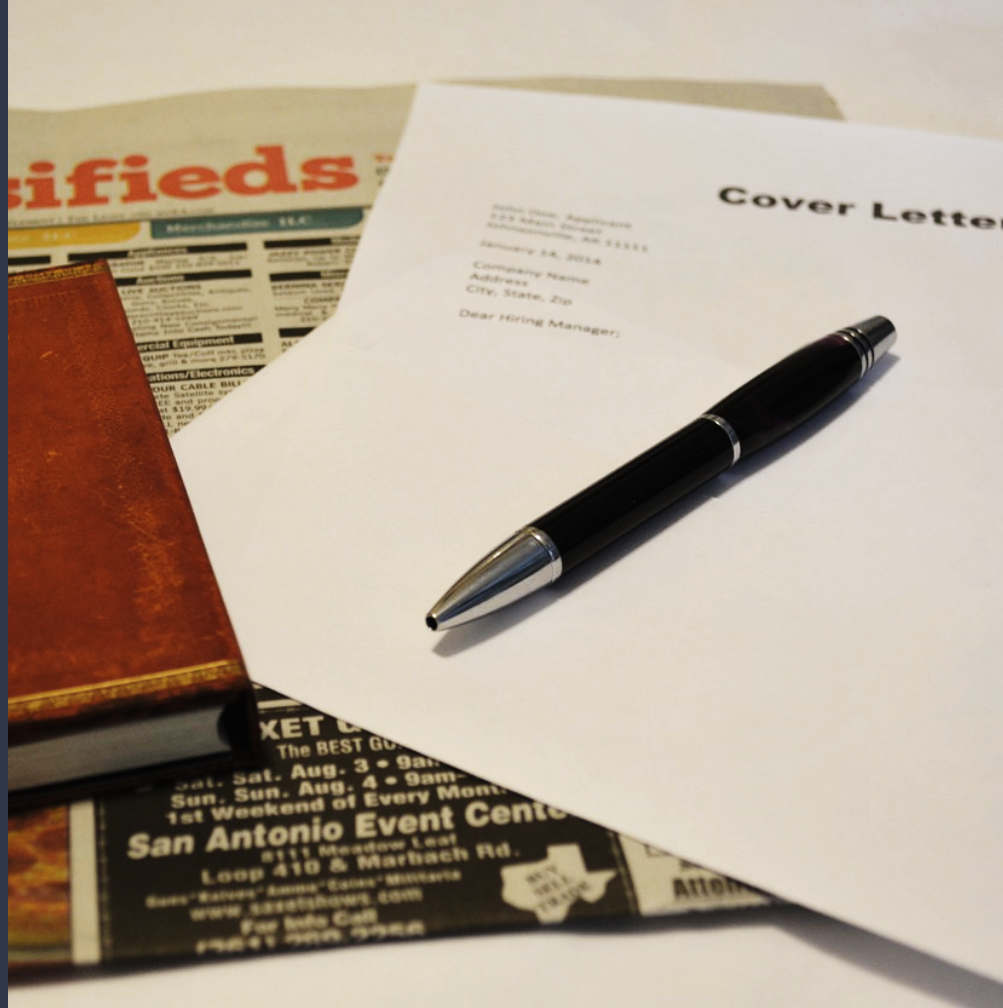


# 4 **MANAGING AN AGILE, DATA-DRIVEN TEAM**

# HIRING

## SCREENING RESUMES:

- ☐ Results
- ☐ Growth
- ☐ Initiative & Leadership
- ☐ Commitment & Resilience



# HIRING

## INTERVIEW TIPS:

- ❑ Past examples
- ❑ Thought process
- ❑ Open-ended questions





# Example Interview Questions

“How did you measure success in your last role?”

“Tell me about something you weren’t good at when you started your role and how you improved.”

“Tell me about a time you didn’t hit a goal and what you did about it.”

# TRAINING

## EMPLOYEE TRAINING:

- ☐ Data Analysis
- ☐ Presentation Skills
- ☐ Professional Development









# Team Culture: Reviewing Metrics

<input type="checkbox"/>	☆	Toast Marketing	Dashboard: Marketing & Sales Dashboard As of 7/31/2015 10:23 PM - The dashboard Marketing & Sales Dashboard t	Jul 31
<input type="checkbox"/>	☆	Toast Marketing	Dashboard: Marketing & Sales Dashboard As of 7/30/2015 10:23 PM - The dashboard Marketing & Sales Dashboard t	Jul 30
<input type="checkbox"/>	☆	Toast Marketing	Dashboard: Marketing & Sales Dashboard As of 7/29/2015 10:23 PM - The dashboard Marketing & Sales Dashboard t	Jul 29
<input type="checkbox"/>	☆	Toast Marketing	Dashboard: Marketing & Sales Dashboard As of 7/28/2015 10:23 PM - The dashboard Marketing & Sales Dashboard t	Jul 28
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<input type="checkbox"/>	☆	Toast Marketing	Dashboard: Marketing & Sales Dashboard As of 7/13/2015 10:23 PM - The dashboard Marketing & Sales Dashboard t	Jul 13

# Team Culture: Planning


 **Twitter Ads & Analysis - 5pt** in list Completed 

Members

Labels


lead gen/advertising



Description Edit  
Goal: 160 leads

☒ **Checklist**

[Hide completed items](#) [Delete...](#)

100% 


☒ ~~Launch "New Restaurant Kit"~~


☒ ~~New ad copy/image every week~~


☒ ~~Test Video Ads~~


Add an item...


Add

 **Members**


 **Labels**


 **Checklist**

 **Due Date**

 **Attachment**

Actions

 **Move**

 **Copy**

INBOUND

#INBOUND15



# Team Culture: Goals and Purpose



**Sales promo analysis** in list In Progress



Members

Labels



**product marketing/nurturing**



Add

**Members**

**Labels**

**Checklist**

**Due Date**

**Attachment**

Description Edit

Goal: evaluate effectiveness of sales promos in closing deals.

Deliverable: graph/chart on # customers per month with what kind of promo or discount they got. (May need multiple graphs if that is simpler.)

Also, if possible, look at the close rate of deals that got a sales promo in their quote vs. didn't.

Look at customers signed October 2014 - February 2015

# LET'S RECAP

1. SET SMART GOALS BASED ON COMPANY PRIORITIES
2. ANALYSIS, TOO, SHOULD HAVE A PURPOSE
3. USE DATA TO COMMUNICATE CLEARLY ACROSS THE COMPANY
4. SIMPLE DATA, SIMPLE PRESENTATIONS WIN
5. AGILE MARKETING HELPS YOU MOVE FAST & STAY FOCUSED
6. ADAPT THE AGILE METHODOLOGY TO KEEP WHAT HELPS YOU
7. HIRE FOR AND REINFORCE THE AGILE, DATA-DRIVEN APPROACH



# THANK YOU

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