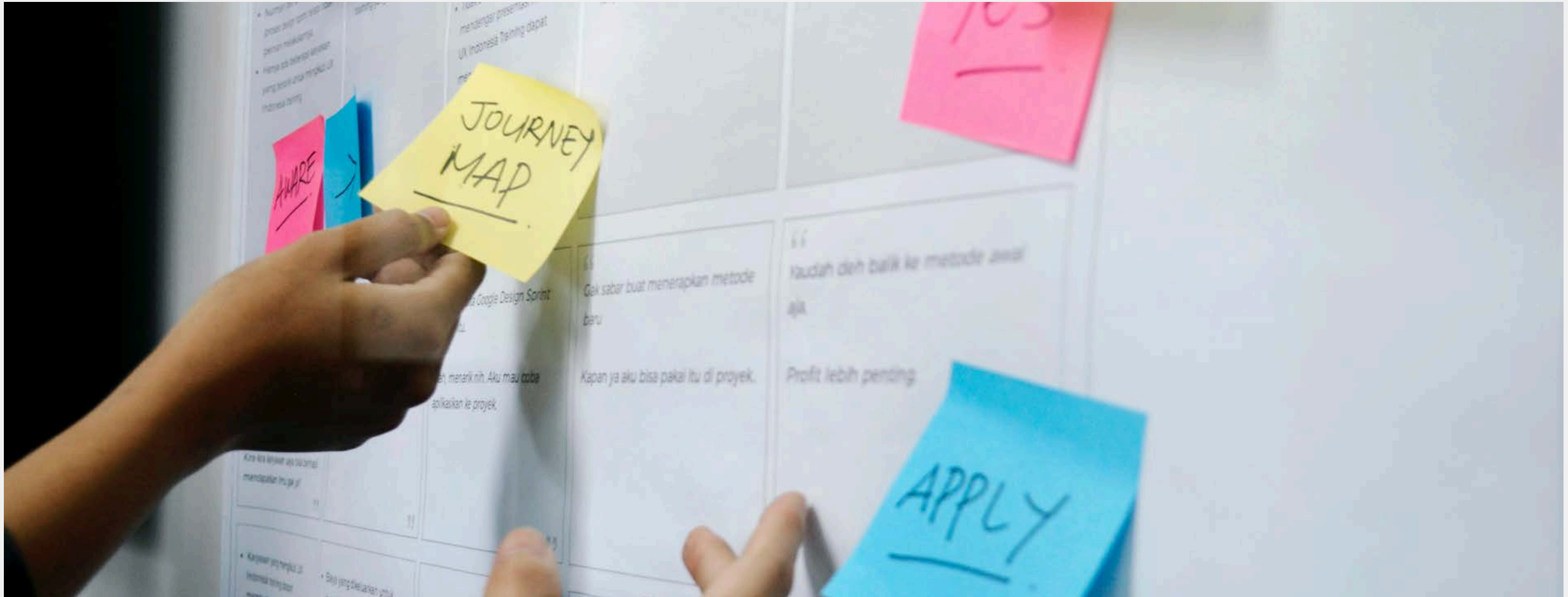


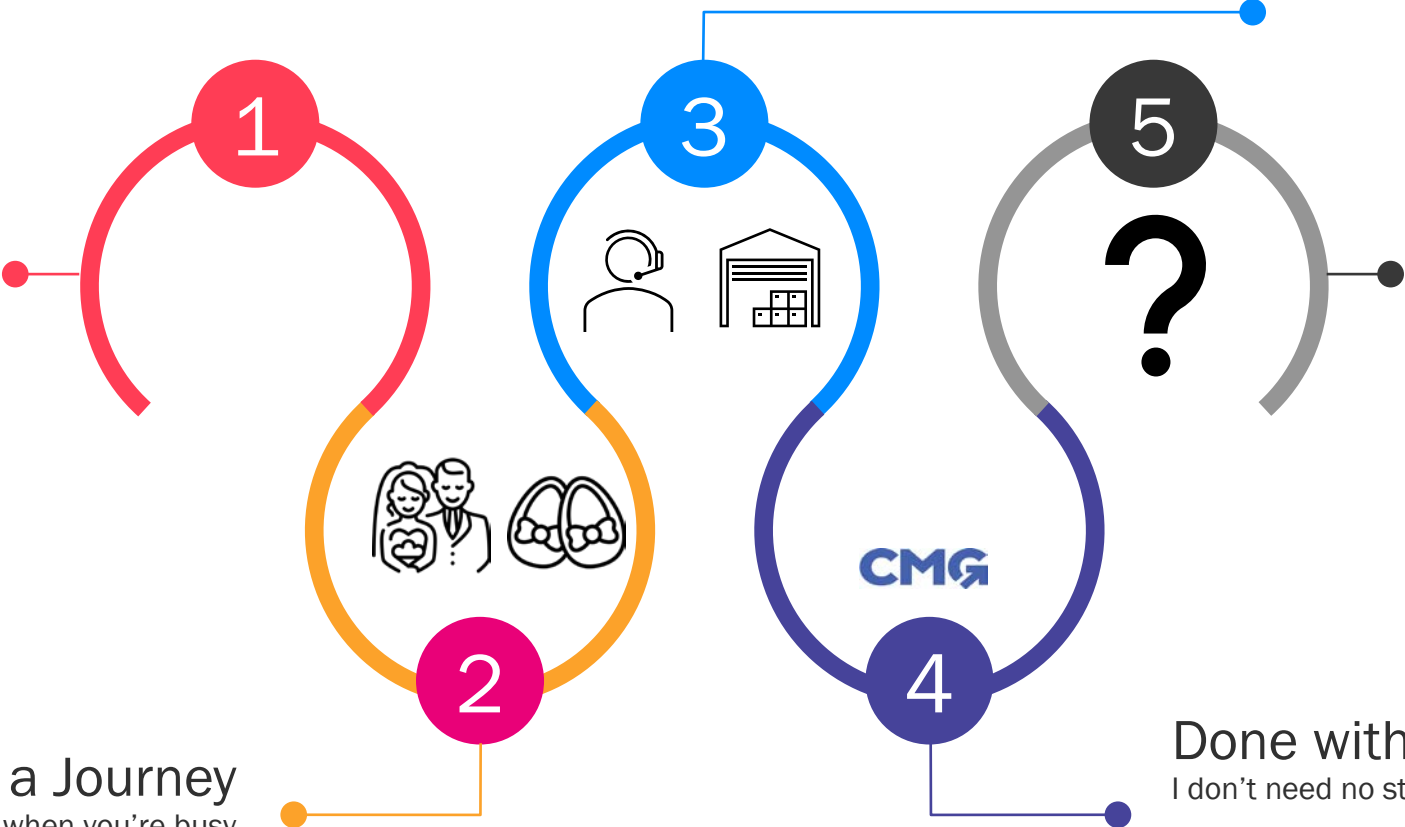
# Inspect and Adapt Your Way to Customer Centricity

## A Modern Marketing Approach



# My Story

A long, long time ago  
Every experience you have is a lesson  
in Human Engineering



It's a Journey  
Life is what happens when you're busy  
making plans

## What haven't I done

You never know what you'll be asked to do in a  
start up – and how you'll carry it forward

## What's Next

Be open to change, even late  
in the journey.

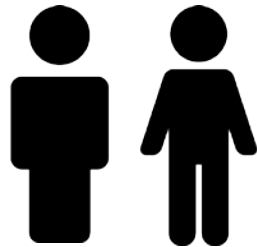
## Done with Corporate Life

I don't need no stinking title 😊

I know what the word means



I've been part of an agile team for at least 1 year



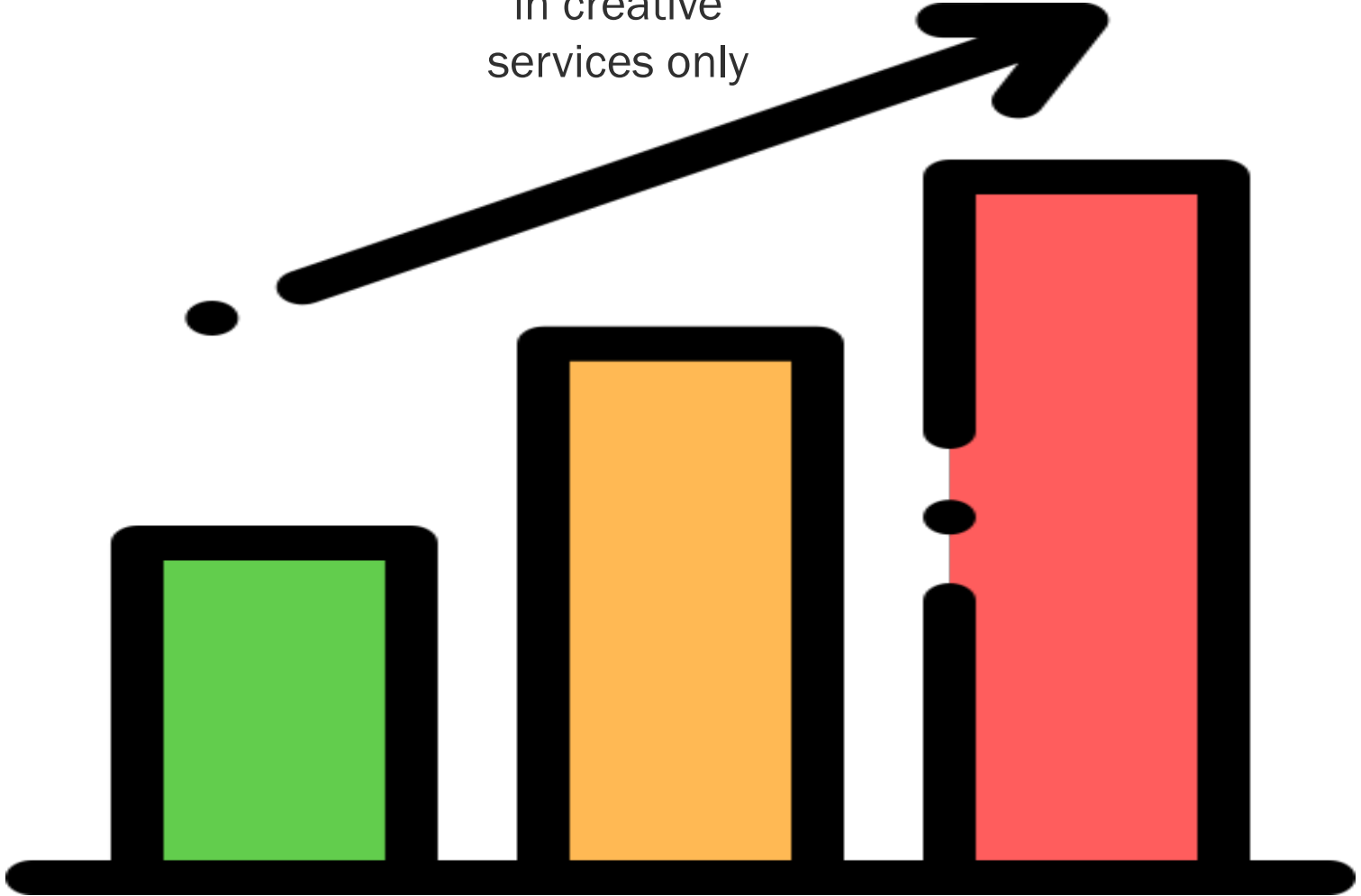
I've worked in more than one business function using agile



Our Marketing Organization has fully adopted agile practices and principles

We utilize agile in creative services only

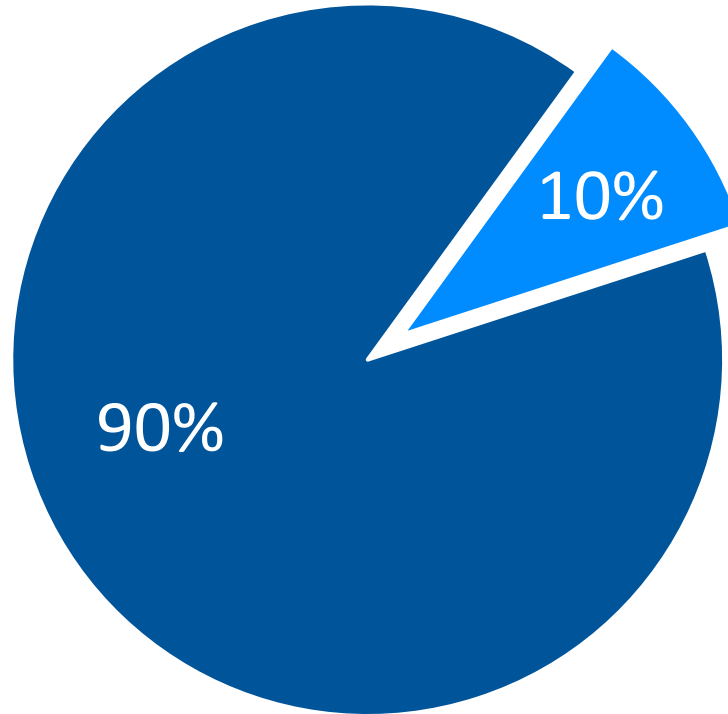
I do not currently work in Marketing



# Agile is a mindset and a methodology

90% of new practices are activated by the agile mindset -- the way we think about our customer, organization, and teams.

Mindset



Methodology

10% of the approach comes through the agile methodology -- how we tactically deliver for our customer, optimize our organization's potential, and work in teams.

# What does being agile mean?

## Agile IS...

---

- A **mindset**
- A way to **experiment** and rapidly learn about and better understand our customer and what value they want
- A **framework** to create short feedback loops to drive better decision making for greater value creation effectiveness and efficiency
- A way to dramatically increase **transparency** within the organization
- A way to quickly expose problems and opportunities so they can be addressed

## Agile IS NOT “just” ...

---

- Only a methodology or process
- A magical solution to your problems
- “Hyper-productive” teams going faster
- A checklist of tactics or to-do’s

# Isn't all agile the same?



“It doesn't matter what industry you're in, agile is all about collaborating to create value that your customers can quickly realize”

**- Stacey Ackerman**

# Agile Marketing Values

Agile Marketing has 5 core values that help guide the way we think about and prioritize work. Note that these values do not eliminate the need for things on the right, but rather emphasize prioritizing the things on the left more often.

Focusing on Customer Value and  
Business Outcomes



Activity and Outputs

Delivering Value Early and Often



Waiting for Perfection

Learning through Experiments  
and Data



Opinions and Conventions

Cross-functional Collaboration



Siloes and Hierarchies

Responding to Change

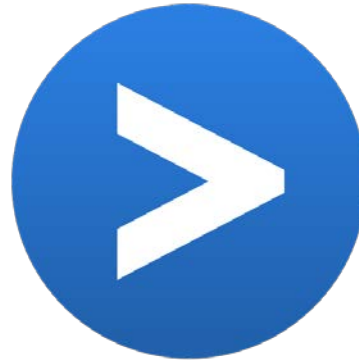


Following a Static Plan



# Delivering Value

Delivering Value  
Early and Often

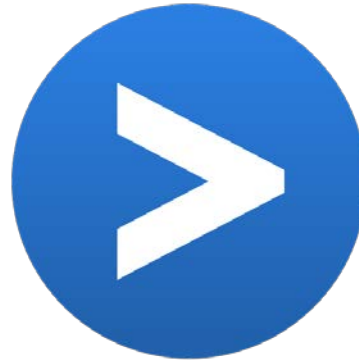


Waiting for  
Perfection

Going to market sooner with new ideas, approaches, or content rather than over-working or waiting for perfection.

# Collaborating

Cross Functional  
Collaboration



Siloes and  
Hierarchies

Cross-functional teams with members that have different roles and responsibilities ensure decisions are made collaboratively and with the customer top of mind.

# Agile Marketing Principles

Agile Marketing principles elaborate on the 5 values and provide a more tangible framework for how to embrace the agile marketing values in our everyday work.

1. Great marketing requires close alignment, transparency, and quality interactions with internal and external customers
2. Seek out different and diverse points of view
3. Embrace and respond to change to enhance customer value
4. Plan only to a level sufficient to ensure effective prioritization and execution
5. Take chances, and learn from your failures
6. Organize in small, cross-functional teams where possible
7. Build marketing programs around motivated individuals and trust them to get the job done
8. Long-term marketing success benefits from operating at a sustainable pace
9. Agile marketing isn't enough. Excellence in marketing requires continuous attention to marketing fundamentals as well
10. Strive for simplicity



# Components of Agile Marketing

# Agile Mindset



Continuous Delivery



Experimentation Mindset



Data Driven

# Continuous Delivery and Minimal Viable Campaigns

**Minimal Viable Campaigns (MVCs)** meet a minimum standard or requirement for launch and are released with the intention of testing new approaches and hypotheses about a target audience. The insights received from an MVC allow you to learn what is effective and adjust your strategy as needed.

## Traditional Campaigns

### Product

Multiple rounds of revisions to perfect the final product

### Timeline

Long period of time between planning and delivery

### Goal

Customer takes action

## Minimal Viable Campaigns

### Product

Not overworked or intended to be perfect

### Timeline

Quick and frequent delivery

### Goal

Learning what works from customer behaviors and refining our approach

# An Experimental Mindset



## Hypothesis

An informed prediction that you are looking to validate about the customer



## Control Group

A subset of your target audience that receives a standard campaign or approach in order to compare results



## Time Box

A defined length of time that the experiment will run for that will garner enough engagement to measure results but still generate insights quickly.



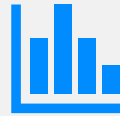
# Data-Driven Insights

To set yourself up for success, consider the following questions when planning a campaign or experiment:



## What will you measure?

- Engagement metrics
- Funnel velocity
- Reach / audience growth



## How will you measure?

- Data source
- Tracking method
- Owner



## How will you interpret results?

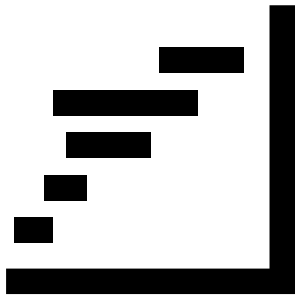
- Establish a baseline
- Understand industry standards
- Set a goal



# Marketing Measurement

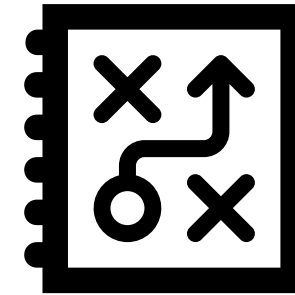
There are two paths that can be taken after measuring the results of an experiment:

## Scale



or

## Adapt

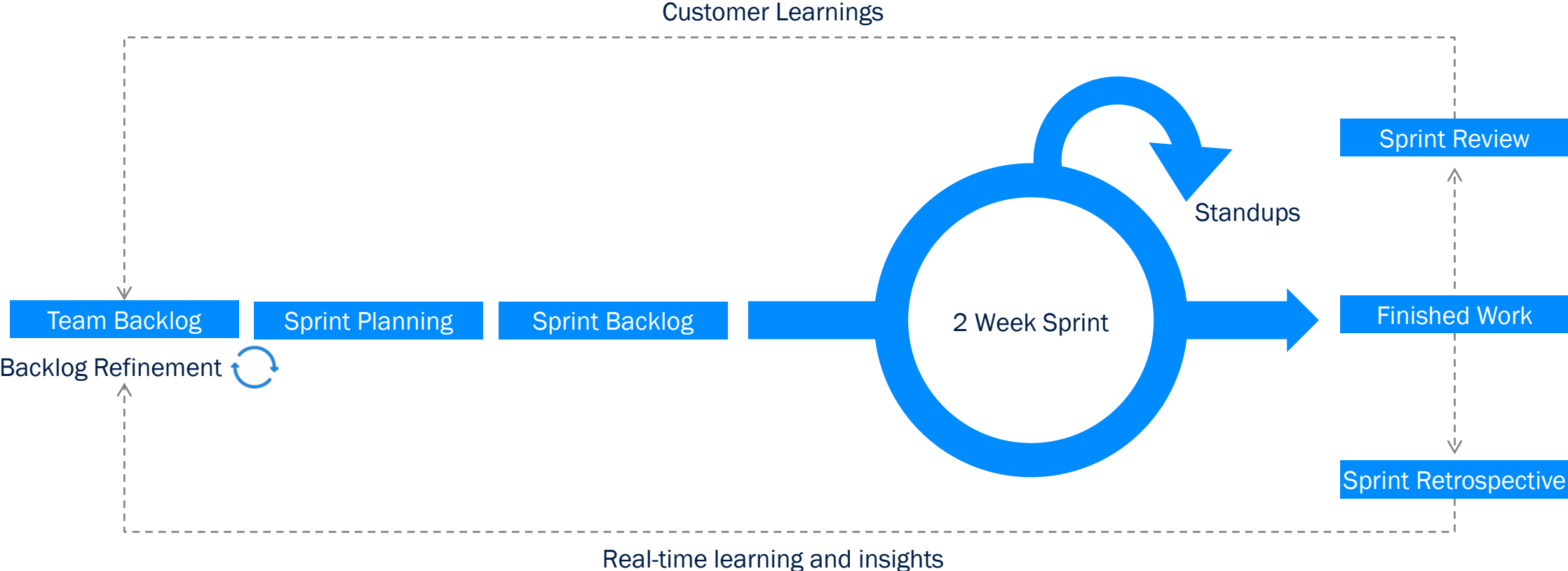


When an approach is successful, consider implementing it on a broader scale (e.g., incorporate into all campaigns for that target customer or roll-out a new process)

If your experiment did not yield the expected results, adapt your hypothesis based on the information you received. Also consider how the insights may adjust your personas, customer journey, or value gap map.

# Methodology & Practices

Delivering value through Sprints - time-boxed, short work cycles that are used to establish focus



# Agile Methodologies

Scrum and Kanban are two commonly utilized agile methodologies. Scrum involves small, cross-functional teams working in short cycles (or “sprints”) while Kanban involves a continuous flow and delivery of work.

## Scrum

- Time-boxed iterations “Sprints”
- Cross-functional teams
- Prescribed roles and ceremonies (daily standups, sprint planning, etc.)
- Outputs are delivered at the end of the Sprint

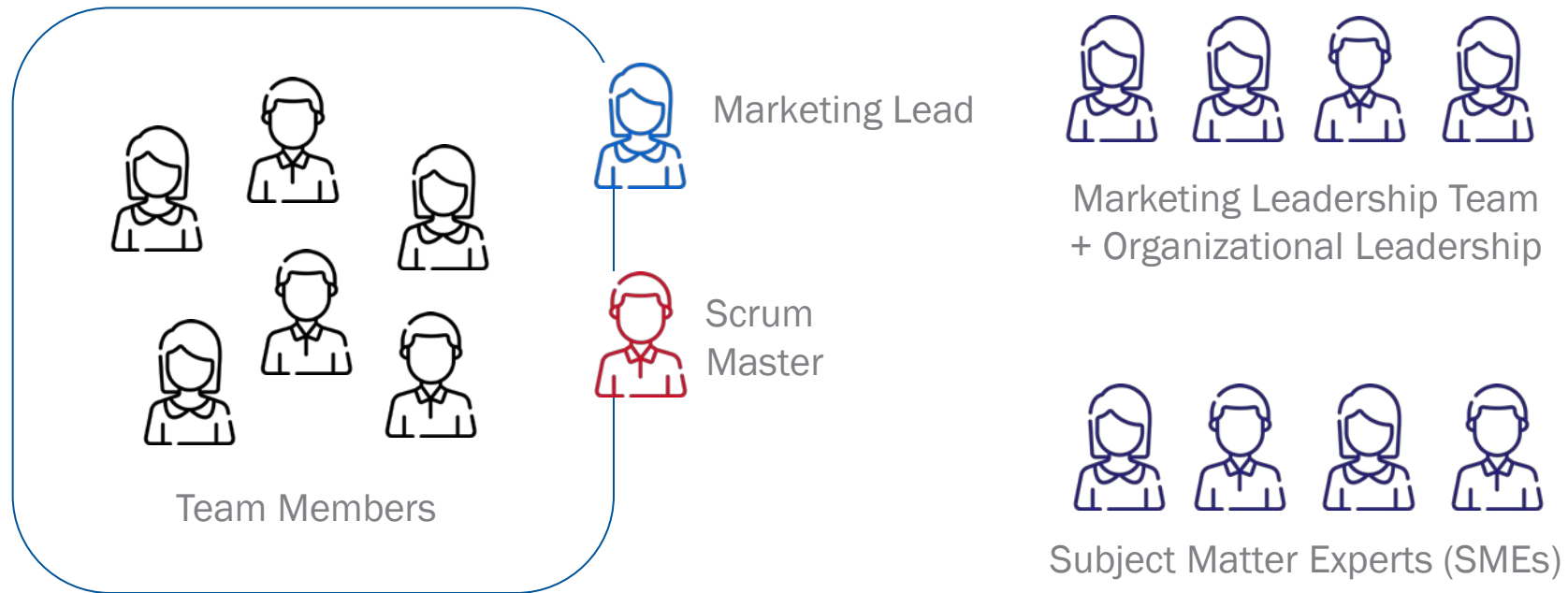
## Kanban

- No sprints; changes in work can happen at any time
- Teams can be specialized
- Less defined ceremonies and roles
- Continuous flow of work; outputs are delivered when ready

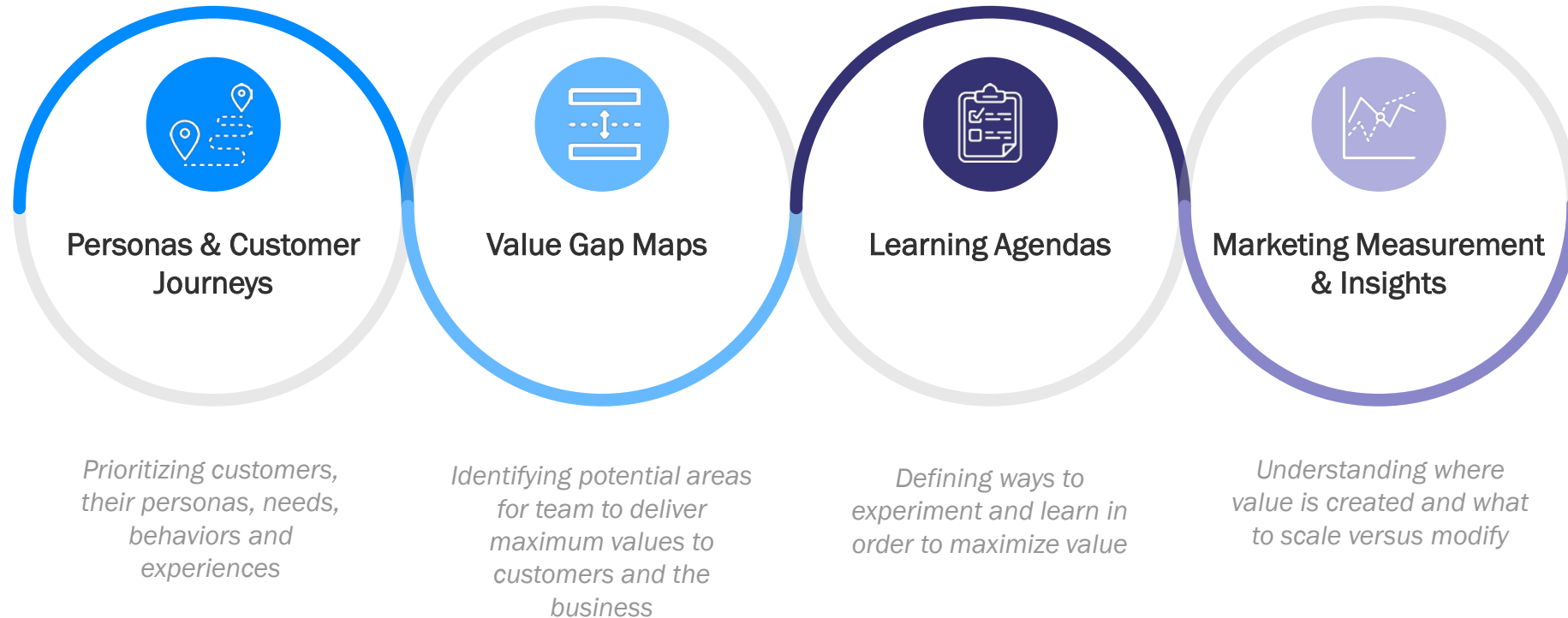
# Agile Teams

Agile Teams (or “Scrum Teams”) are small, cross-functional teams that work in short cycles (or “sprints”).

## *Agile Team Structure:*



# Modern Marketing – An Agile Approach



# What is a Persona?

What is it?

A Persona is a snapshot of a customer that helps us understand how customers define “value”, what are their drivers, motivators, and needs.

Why have it?

Creating **personas** will help you to understand your users' needs, experiences, behaviors and goals. It will help the team to think like the customer, to recognize the different needs and expectations of different customer personas and enable the team to develop more customized journeys.

*Personas help us answer:*

**WHO** you need to persuade (Attributes)

**WHAT** information they need to make their decision (Decision Criteria)

**WHEN** they are most likely to be receptive to your message (Trigger events)

**WHERE** to reach buyers with your marketing content (information sources)

**WHY** your marketing plan is the best course of action (Definition of Success)

<b>Name/Title:</b> Insert assigned Persona Name and job title(s)		<b>Value:</b> What does this person value and how do they define value?
<b>Image:</b>	<b>Influencers/Information Sources</b> Where does the buyer visit and what assets do they trust for new information and insights? Who influences their decision?	<b>Perceived Barriers</b> Why would prevent this buyer from purchasing/selecting your solution? (could relate to prior attempts to solve the problem, negative product perceptions, etc.)
<b>Attributes:</b> What are the key qualifications and responsibilities associated with this buyer?	<b>Triggering Event/Situation:</b> What changes trigger this buyer persona's search for your solution?	<b>Decision Criteria:</b> What are the the top 3-5 factors that this persona uses to compare alternative or competing options?
		<b>What does success look like?</b> What results or outcomes does this buyer persona expect from successful adoption of your solution? Be specific, include tangible/logical outcomes as well as aspirational/emotional goals.

# What is a Customer Journey?

## What is it?

A customer **journey map** is a visual representation of the customer **journey**. It helps you tell the story of your customers' experiences with your company across all touchpoints.

## Why have it?


Journey maps will enable the team to have a better understanding of customer expectations and current experience versus desired experience and where the experience can be optimized. This exercise helps businesses step into their customer's shoes and see their business from the customer's perspective.

### *Customer Journeys help us answer:*

**WHAT** are the customers needs at each stage in their journey, what information they seek, what questions they are trying to answer.

**WHERE** buyers look for information, what steps they take and how they collect information.

**HOW** is their experience? Is it easy to find the information they look for? Are they delighted or frustrated at each step in the process?

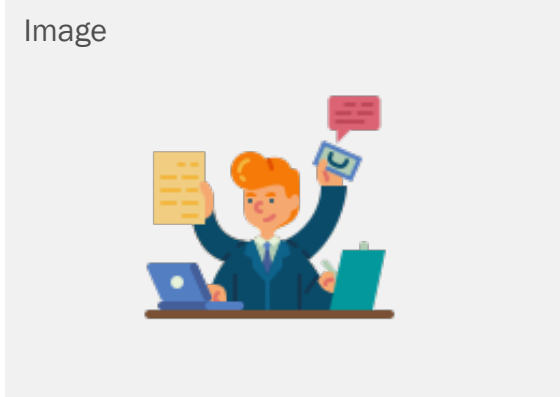


	AWARENESS	INTEREST / CONSIDERATION	EVALUATION	PURCHASE	POST-PURCHASE
ACTIVITIES					
BARRIERS					
QUESTIONS					
VALUE					

# Customer Persona – Meal Kit Delivery Service

Name/Title  
**Busy Betty**

Value  
*Efficiency*                      *Sustainability*                      *Cost Savings*  
*Healthy lifestyle*                      *Self-Service*



Influencers/Information Sources  
*Social media*  
*TV Commercial / ads*  
*Network of friends/family (referrals)*  
*Subscription to blogs / email newsletters*

Perceived Barriers  
*Meals won't actually taste good*  
*Value (are the meals worth the price?)*  
*Low quality ingredients (i.e., worried that meat and produce won't be fresh)*  
*Locked into a long-term subscription*

Attributes

- *Young professional*
- *Works a well-paying corporate job*
- *Busy during the day (work-aholic)*
- *Places importance on diet/lifestyle*
- *Likes to plan ahead*
- *Enjoys cooking but not finding recipes and grocery shopping*
- *Typically uses delivery services for things like groceries and meals to save time*

Triggering Event/Situation

- *No time to meal plan and grocery shop*
- *Food going to waste*
- *Spending too much on take-out*
- *Feeling uninspired in the kitchen*
- *Change in schedule*

Decision Criteria

- *Price*
- *Quality*
- *Availability/Frequency of delivery*
- *Variety of meal choices*
- *Catering to diet/lifestyle*

What does success look like

- *Finding a reliable source of healthy and quick meals that can be enjoyed at home during the work week*
- *Not having to spend too much time thinking about or planning for meals during my busy schedule*
- *Saving money AND eating healthier by not doing take-out*



# Mapping a Customer Journey | Exercise



15 Mins.

Using the Busy Betty persona, work with your table to fill out the customer journey.

	AWARENESS	INTEREST / CONSIDERATION	EVALUATION	PURCHASE	POST-PURCHASE
What the customer is doing at this stage. →					
The customer's perceived barriers or obstacles. →					
Questions the customer is seeking answers to. →					
What experiences or information the customer values. →					

# Busy Betty Customer Journey

	AWARENESS	INTEREST / CONSIDERATION	EVALUATION	PURCHASE	POST-PURCHASE
ACTIVITIES	<ul style="list-style-type: none"> <li>- Recognizes the problem</li> <li>- Talk to other people they trust with similar lifestyles</li> <li>- Follow influencers and accounts on social media with similar interests</li> </ul>	<ul style="list-style-type: none"> <li>- Search online for meal prep ideas / time savers</li> <li>- Talk to other people who have been using the product</li> <li>- Research different brands and begin to compare/contrast them</li> <li>- Look at reviews online</li> </ul>	<ul style="list-style-type: none"> <li>- Price check among companies</li> <li>- Drilling down on which companies fit my lifestyle best</li> <li>- Budgeting to factor in price</li> <li>- Reviewing third-party sources of info (i.e., "best of" lists)</li> </ul>	<ul style="list-style-type: none"> <li>- Creating an account and inputting personal info (email, address, phone, etc.)</li> <li>- Selecting first meals</li> <li>- Determine frequency of meals and deliveries</li> </ul>	<ul style="list-style-type: none"> <li>- Changing meal options to satisfaction</li> <li>- Plan reorder frequency and methods</li> <li>- Getting into the habit of choosing meals to get delivered</li> </ul>
BARRIERS	<ul style="list-style-type: none"> <li>- Fear of being locked into another subscription service</li> <li>- High upfront costs</li> <li>- Lack of flexibility</li> <li>- Low quality / freshness</li> <li>- Limited time to explore further</li> </ul>	<ul style="list-style-type: none"> <li>- Price per meal with delivery kits vs grocery shopping</li> <li>- Ability to cater to diet and/or food preferences</li> </ul>	<ul style="list-style-type: none"> <li>- Current budget</li> <li>- Too much coordination required to pick your meals weekly/monthly</li> <li>- Availability in area for delivery</li> <li>- Unfavorable subscription terms/options</li> </ul>	<ul style="list-style-type: none"> <li>- Ability to "opt-out" if I don't like it</li> <li>- Difficult and/or long sign-up process</li> </ul>	<ul style="list-style-type: none"> <li>- Meals do not live up to expectations</li> <li>- Delayed shipment and/or processing error</li> <li>- Lifestyle circumstances changing (i.e., schedule, budget, diet)</li> </ul>
QUESTIONS	<ul style="list-style-type: none"> <li>- is the price worth it?</li> <li>- What is the frequency of deliveries? Is it flexible?</li> <li>- Are the meals appetizing?</li> <li>- Will this make my life easier?</li> </ul>	<ul style="list-style-type: none"> <li>- How does the price compare to my current meal plan?</li> <li>- Will I be able to change the number of meals I receive every week?</li> <li>- Are there enough options to fit my diet/preferences?</li> </ul>	<ul style="list-style-type: none"> <li>- Which company is best for me?</li> <li>- What meal frequency and subscription length works best for me?</li> <li>- Is the price reasonable for my budget?</li> </ul>	<ul style="list-style-type: none"> <li>- How often and far ahead do I need to make meal choice decisions?</li> <li>- How much will this cost (i.e., are there any additional fees? How much am I paying upfront)?</li> <li>- How often do I need to pay?</li> <li>- Can I easily opt out of this service?</li> </ul>	<ul style="list-style-type: none"> <li>- Should I keep paying for this service?</li> <li>- How do I contact someone if there is an issue?</li> <li>- Has this made my life easier?</li> </ul>
VALUE	<ul style="list-style-type: none"> <li>- Potential solutions to their problem</li> <li>- Learning about options their trusted friends us</li> </ul>	<ul style="list-style-type: none"> <li>- Cost information</li> <li>- Finding information quickly</li> <li>- Getting a deeper understanding of options available and how it works (i.e., what will I receive in my delivery kit)</li> <li>- Seeing someone "like me" using and valuing the product</li> </ul>	<ul style="list-style-type: none"> <li>- Comparisons of brands</li> <li>- Testimonials from existing customers</li> <li>- Meal budget calculator tool</li> <li>- Ability to view meal options</li> </ul>	<ul style="list-style-type: none"> <li>- Easy checkout process</li> <li>- Ability to choose or change meals on the go (i.e., mobile app)</li> <li>- Promotional deals (i.e., buy one, get one; free shipping)</li> </ul>	<ul style="list-style-type: none"> <li>- Ease of meal re-selection</li> <li>- Effortless transition into weekly routine</li> <li>- Weekly meal choice reminders</li> <li>- Loyalty benefits</li> <li>- Refer-a-friend program</li> </ul>

# What is a Value Gap Map?

**What is it?** A comparison of the amount of value a customer expects across their journey vs. the amount of value they currently receive

**Why have it?** A Value Gap Map uncovers the stages in a journey where customer expectations are not being met by current offerings.

A Value Gap Map will be built to:

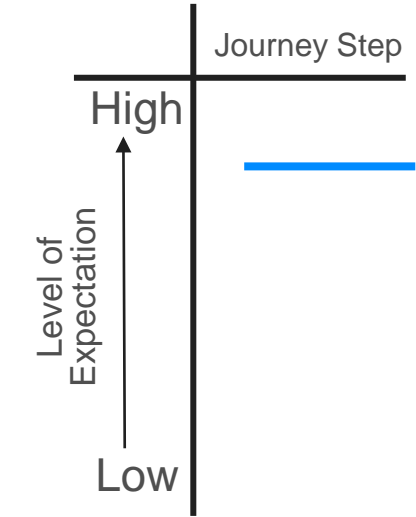
- **Prioritize** stages of the journey to focus on improving
- **Identify** root cause of the value gap and how to fill it
- **Inform** development of Learning Agendas and the team's backlog



# Building a Value Gap Map

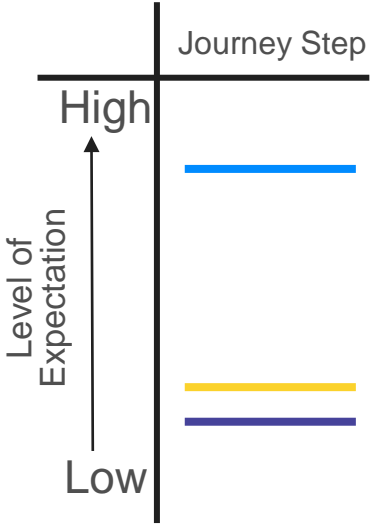
Value gap mapping is the process of identifying the value expected by the customer at each stage of their journey (e.g., what do they want to be experiencing, in what way, how frequently) and then comparing that to the value they are currently receiving by your organization and your competitors.

## 1. Identify value expected by customer



Value sought by member

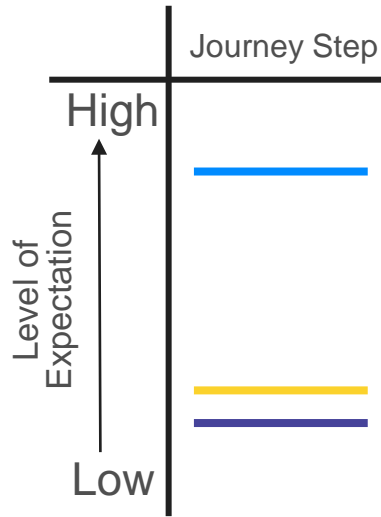
## 2. Identify value delivered by organization and competitors



Value delivered by org.

Value delivered by competitor

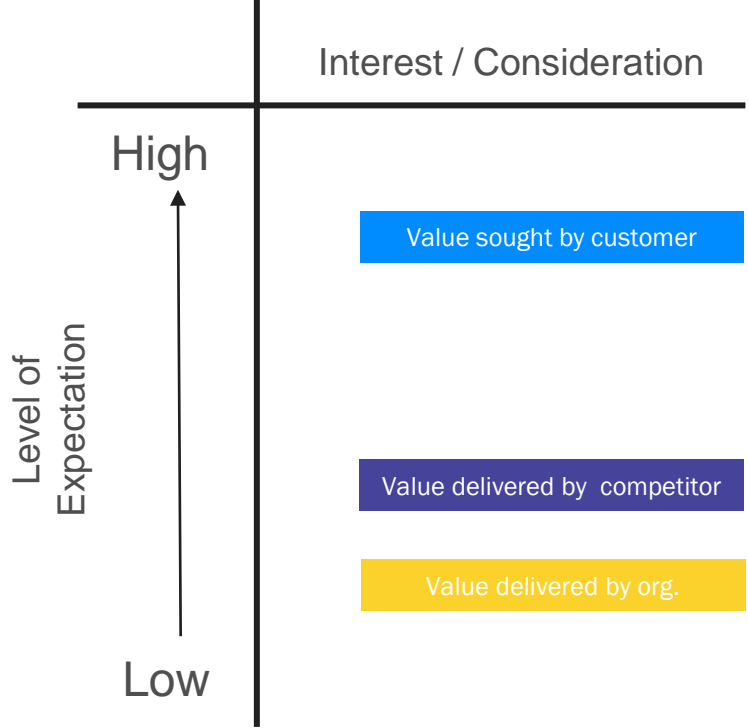
## 3. Identify value gaps



# Busy Betty Value Gap Map Example

Interest / Consideration Stage

INTEREST / CONSIDERATION	
VALUE EXPECTED	<ul style="list-style-type: none"> <li>- Finding information quickly</li> <li>- Getting a deeper understanding of options available and how it works (i.e., what will I receive in my delivery kit)</li> <li>- Getting a sense of cost</li> <li>- Seeing someone “like me” using and valuing the product</li> </ul>
VALUE DELIVERED	<ul style="list-style-type: none"> <li>- “How it works” page on our website that is hidden and hard to find</li> <li>- Has a “this week’s meals” campaign on social media</li> <li>- Promotes monthly promo deals (i.e., 20% off; buy one, get one, etc.) on their homepage and on social</li> </ul>
COMPETITOR VALUE	<ul style="list-style-type: none"> <li>- Uses blogs highlighting different customer testimonials and user experiences</li> <li>- Uses SEO and paid ads to appear at the top of Google search results</li> <li>- Also promotes monthly promo deals (i.e., 20% off; buy one, get one, etc.) on their homepage and on social</li> </ul>
GAPS	<ul style="list-style-type: none"> <li>- Highlight volume of options over time (not just what’s available in the moment)</li> <li>- Incorporate actual high-level cost info in campaigns; not just promo deal</li> <li>- Campaigns targeting specific diets / meal preferences</li> <li>- “How it works” page is hard to find; needs to be directly linked on the homepage</li> <li>- Improve SEO</li> <li>- Paid search ads</li> </ul>




# What is a Learning Agenda?

**What is it?** The **learning agenda** defines what the team is seeking to better understand (i.e. learn) about their customer to be able to better deliver value.

**Why have it?** A learning agenda enables the team to focus on a data-driven approach to learning, to methodically build customer understanding that will help you better meet customer needs.

## What is included in a learning agenda items:

- **Questions** the team has about the customer that will help you better create value for them?
- **Ideas** you have to close the gap between customer expectations and current delivery
- **Tests** the team wants to run to improve effectiveness



Learning Agenda				
	Awareness	Evaluation	Purchase/ Onboarding	Renewal
What do we want to learn?				
What will help us be more effective?				
What do we potentially want to test?				
What do we need?				

# Creating a Learning Agenda | Exercise



10 Mins.

Using the Busy Betty persona, work with your table to fill out the learning agenda.

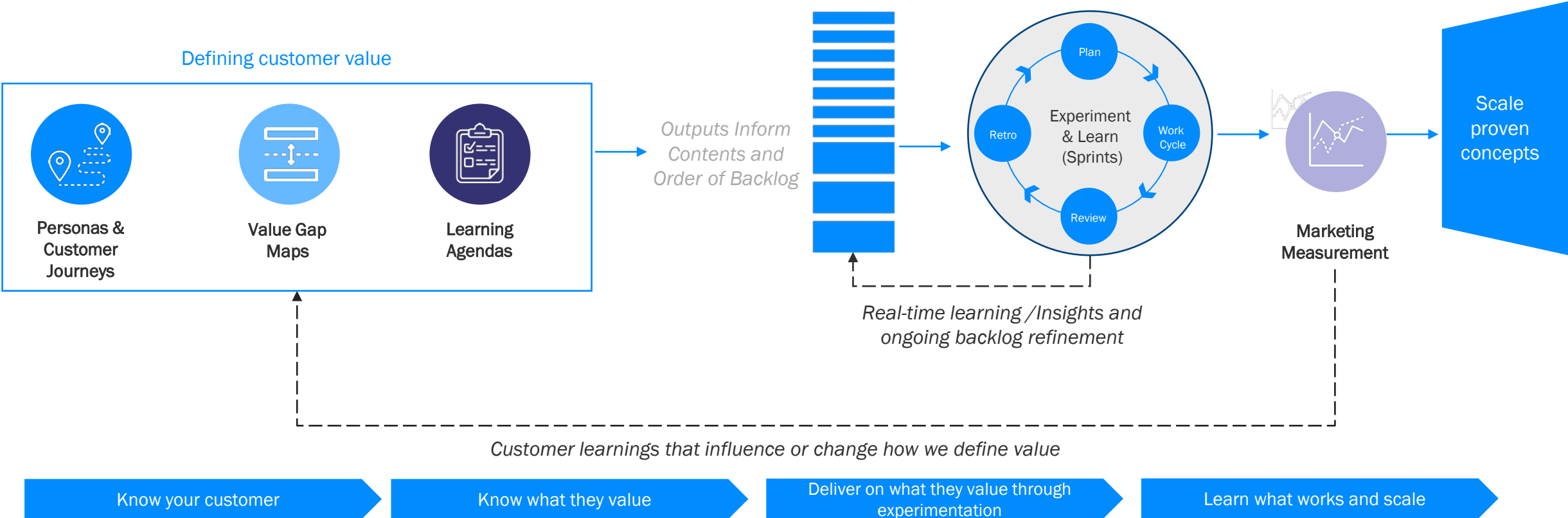
<b><i>Interest/Consideration</i></b>	<i>What do we want to learn?</i>	<i>What will it help us understand?</i>	<i>How will we test it?</i>

# Busy Betty Learning Agenda Example

	<i>What do we want to learn?</i>	<i>What will it help us understand?</i>	<i>How will we test it?</i>
<b>Interest/Consideration</b>	<ul style="list-style-type: none"> <li>• What potential customers are missing in this stage?</li> <li>• Why are customers missing us in their consideration set?</li> <li>• How long is it taking for a customer to go through our website and find information they need?</li> <li>• What drives customers interest the most? Price, recipes, flexibility, etc?</li> </ul>	<ul style="list-style-type: none"> <li>• Do we need to change the language on the initial website pages?</li> <li>• Should we include a help chat bot on website – this could help discover customer questions and connect new customers directly to Customer Service</li> <li>• Provide as much info as possible – this stage leads to evaluation, which leads to purchase</li> </ul>	<ul style="list-style-type: none"> <li>• Discover the key words our target audience are using when searching for meal prep delivery services</li> <li>• The effectiveness of collaborating with social media [chef] influencers               <ul style="list-style-type: none"> <li>• Would the cost justify the engagement?</li> </ul> </li> </ul>

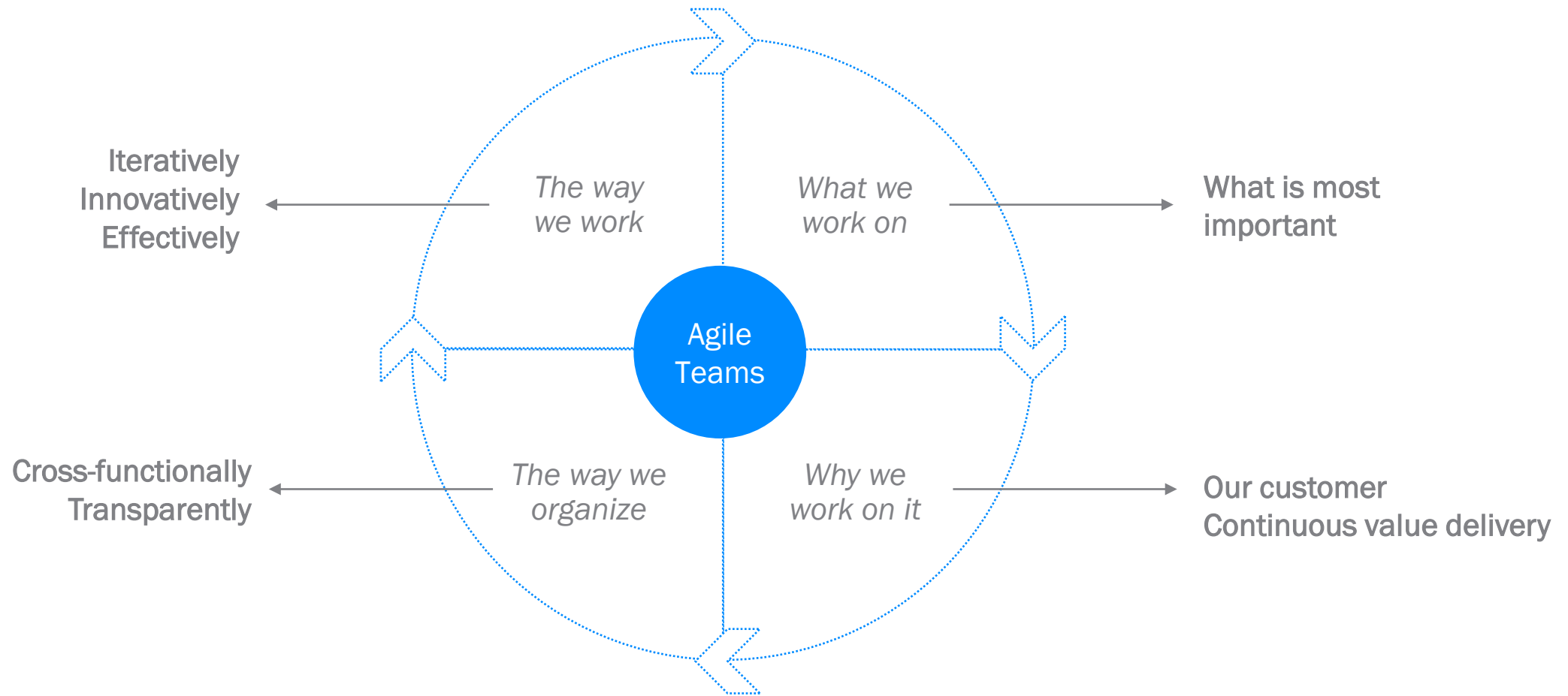


# Modern Marketing and Agile Practices



# Agile empowers us to continually improve

Agile is a journey of continually improving the way we work, how we organize, what we work on, why we work on it. It is not something we achieve over night or simply check off our list.



# Knowledge Check

# **Marketing experimentation allows us to...**

- a. Test different ways of working**
- b. Produce more deliverables**
- c. Learn more about the customer and adapt our approach**
- d. None of the above – experimentation is not a component of Agile Marketing**

## **What is the purpose of a Sprint Review?**

- a. To share work completed with stakeholders and receive feedback**
- b. To highlight value being delivered by the team**
- c. To openly discuss and resolve roadblocks the team may be experiencing**
- d. All of the above**

**Customer personas  
require rigorous  
research and vetting  
before they can be  
used?**

- a. True**
- b. False**

**Which of the following best describes the use of Learning Agendas?**

- a. Defining what the team is seeking to understand about the customer**
- b. What we want a prospective customer to know about the company**
- c. A guide for knowledge transfer between teams**
- d. A running list of questions the team was unable to answer**

**Agile Marketing allows us to improve on which of the following?**

- a. The way we work**
- b. What we work on**
- c. Why we work on it**
- d. How we organize**
- e. All of the above**



# Insights & Questions

# Thank You!

CMG helps organizations thrive –  
and it all starts with your ThriveNumber score

Ask us how you can learn more.

