

**AGILE
MARKETING
IN THE
AGE OF
DISRUPTION**

BUILD.



MEASURE.



LEARN.



REPEAT.



PAICR | THE ASSET
MANAGEMENT
MARKETING
ASSOCIATION
2017 ANNUAL CONFERENCE

The Westin Grand Central | Nov.13 & 14, 2017

Case Study: Lessons Learned on Implementing Agile



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Director of Content Marketing

Getting Started

The Good

The Bad

The “Wish I Had Known”

AGILE MARKETING IN THE AGE OF DISRUPTION



Getting Started

Talk with your IT department

Get training

Discuss what makes sense for your team

Create your first backlog

A	B	C	D	E	F	G	H	I
#	Report	Saved	Name	Current Task Owner	Primary Audience	# of Versions	Frequency	
1	x		Qtrly BK Precious Metals - letter only	Client Communications				
2	x		BK Fees and Commissions	Client Communications				
3	x		BK Service Model Change (Corestone)	Client Communications				
4	x		Annual BK 408b2	Client Communications				
5	x		BK IRA Custodial Fees - letter only	Client Communications				
6	x		Proxy Notifications	Client Communications				
7	x		Annual Policy Document Mailing	Client Communications				
8	x		Intermediary Product Notifications	Client Communications				
9	x		Annual 5500C Mailing	Client Communications				
10	x		Annual LQ Advisor Handbook Update	Client Communications				
11	x		Plan reinstatement mailings and reminders	Client Communications				
12	x		Annual 403(b)(457(b)) Over Contribution Mailing	Client Communications				
13	x		Money Market Reform	Client Communications				
14	x		Annual SMPLE Summary	Client Communications				
15	x		Annual 408b2	Client Communications				
16	x		Annual Participant Disclosure Service (2)	Client Communications				
17	x		Custodial Changes	Client Communications				
18	x		Monthly Giftwrap Maturity Mailing	Client Communications				
19	x		Annual Sweep Mailing cover letter	Client Communications				
20	x		Investment Planner Mailings (2)	Client Communications				
21	x		W4-P	Client Communications				
22	x		70 1/2 RMD Mailing and Reminder	Client Communications				
23	x		W-8 / W-9 Mailing	Client Communications				
24	x		Annual 5498 (2)	Client Communications				
25	x		Escheatment	Client Communications				
26	x		1042-S (haven't had any tactics on this one for a few yrs)	Client Communications				
27	x		Gifted K-1	Client Communications				
28	x							
29	x							
30	x	816	815	Equity Income Active Insight	Product Marketing	Intermediary	1	Quarterly
31	x	817	816	Equity Income Active Insight - Ameriprise version	Product Marketing	Intermediary	1	Quarterly
32	x	818	817	Equity Income Brochure	Product Marketing	Intermediary	1	Quarterly
33	x	819	818	Equity Income vs Value flyer	Product Marketing	Intermediary	1	Quarterly
34	x			Inflation Fund Comparison	Product Marketing	Intermediary	1	Quarterly
35	x			Market Neutral Value fund process flyer	Product Marketing	Intermediary	1	Quarterly
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		821		One Choice Target Date Best of Breed	Product Marketing	DCIO	1	Quarterly
		822		One Choice Target Date Performance Update Flyer (Marissa Updates)	Product Marketing	DCIO	1	Quarterly
		823		One Choice Target Date Sharpe/Sortino Ratio Active Insight	Product Marketing	DCIO	1	Quarterly
		824		The Reality of Interest Rate Risk on Our Bond Funds	Product Marketing	Intermediary	1	Quarterly
		825		ac-alternatives-income-fund-product-presentation-irm	Product Marketing	Intermediary	1	Quarterly
		826		ac-alternatives-income-fund-short-product-presentation-irm	Product Marketing	Intermediary	1	Quarterly
		827		AC Alternative Brochure	Product Marketing	Intermediary	1	Annual
		828		Microsite	Product Marketing	Intermediary	1	Annual
		829		Sell the Space presentations (how many total?)	Product Marketing	Intermediary	8	Quarterly
		830		Smart Tax Solutions Brochure	Product Marketing	Intermediary	1	Annual
		831		Inflation Solutions Brochure	Product Marketing	Intermediary	1	Annual
		832		Income Solutions Brochure	Product Marketing	Intermediary	1	Annual
		833		CPM Monthly Emails - Version for external use	Product Marketing	Intermediary	5	Monthly
		834		CPM Quarterly Emails - Version for external use	Product Marketing	Intermediary	10	Quarterly
		835		Disciplined Equity Capabilities Brochure	Product Marketing	Intermediary	1	Annual
		836		Disciplined Equity Capabilities Brochure	Product Marketing	Institutional	1	Annual
		837		UK Corporate Overview Flyer	Product Marketing	Institutional	1	Quarterly
		838		One Choice Target Date at a Glance	Product Marketing	Intermediary	1	Annual
		839		One Choice Target Risk Flyer	Product Marketing	Direct	1	Annual
		840		CIT at a Glance Flyer	Product Marketing	Institutional	1	Annual
		841		AC AIs Long-Short Product Presentation	Product Marketing	Institutional	1	Quarterly
		842						



The Good

Collaboration
Transparency
Communication
Prioritization





The Bad

Behaviors must change

Agile & Project Requests – related but not the same

Unplanned Requests





Wish I Had Known

Implement Agile for the right reasons

Sponsorship matters

Your current team structure probably won't work

Engage your non-Agile business partners

