

**AGILE
MARKETING
IN THE
AGE OF
DISRUPTION**



PAICR | THE ASSET
MANAGEMENT
MARKETING
ASSOCIATION
2017 ANNUAL CONFERENCE

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Case Study: Lessons Learned on Implementing Agile



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Getting Started

The Good

The Bad

The “Wish I Had Known”



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
#	Required	Sacred	Name	Current Team Ownership	Primary Audience	# of Versions	Frequency	
2	x		Q3R1: Precious Metals - letter only	Client Communications				
3	x		BK Fees and Commissions	Client Communications				
4	x		BK Service Model Change (Corestone)	Client Communications				
5	x		Annual BK 408B	Client Communications				
6	x		BK/IA Custodial Fees - letter only	Client Communications				
7	x		Phone Book	Client Communications				
8	x		Annual Policy Document Mailing	Client Communications				
9	x		Intermediary Product Notifications	Client Communications				
10	x		Annual Q3/OC Mailing	Client Communications				
11	x		Annual Q3/OC Handbook Update	Client Communications				
12	x		Plan reinstatement mailings and reminders	Client Communications				
13	x		Annual 403(b)/457(b) Over Contribution Mailing	Client Communications				
14	x		Money Market Reform	Client Communications				
15	x		Annual 408B Summary	Client Communications				
16	x		Annual 408B2	Client Communications				
17	x		Annual Participant Disclosure Service (2)	Client Communications				
18	x		Custodial Changes	Client Communications				
19	x		Marissa Fund Maturity Mailing	Client Communications				
20	x		Annual Sweep Mailing cover letter	Client Communications				
21	x		Investment Planner Mailings (2)	Client Communications				
22	x		W4/W5	Client Communications				
23	x		70/10 RMD Mailing and Reminder	Client Communications				
24	x		W8/W9 Mailing	Client Communications				
25	x		Annual 549B (2)	Client Communications				
26	x		Eschewment	Client Communications				
27	x		(102.5 haven't had any tactics on this one for a few yrs)	Client Communications				
28	x			Client Communications				
29	x			Client Communications				
30	x		819-818	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		816-817	Equity Income Brochure	Product Marketing	Intermediary	1	Quarterly
33	x		819-818	Equity Income vs Value Flyer	Product Marketing	Intermediary	1	Quarterly
34	x		820-819	Inflation Fund Companion	Product Marketing	Intermediary	1	Quarterly
35	x			Market Neutral Value fund process flyer	Product Marketing	Intermediary	1	Quarterly
36	x			One Choice Target Date Best of Breed	Product Marketing	DCIO	1	Quarterly
37	x			One Choice Target Date Performance Update Flyer (Marissa Updates)	Product Marketing	DCIO	1	Quarterly
38	x			One Choice Target Date Sharpe/Sorting Ratio Active Insight	Product Marketing	DCIO	1	Quarterly
39	x			The New Fund Product Lineup on Our Bond Funds	Product Marketing	Intermediary	1	Quarterly
40	x			ac-alternatives-income-fund-product-presentation-item	Product Marketing	Intermediary	1	Quarterly
41	x			ac-alternatives-income-fund-short-product-presentation-item	Product Marketing	Intermediary	1	Quarterly
42	x			AC Alternative Brochure	Product Marketing	Intermediary	1	Annual
43	x			Microsite	Product Marketing	Intermediary	1	Annual
44	x			Sell the Space presentations (how many total)?	Product Marketing	Intermediary	8	Quarterly
45	x			Smart Tax Solutions Brochure	Product Marketing	Intermediary	1	Annual
46	x			Inflation Fund Brochure	Product Marketing	Intermediary	1	Annual
47	x			Income Solutions Brochure	Product Marketing	Intermediary	1	Annual
48	x			CPI Monthly Emails - Version for external use	Product Marketing	Intermediary	5	Monthly
49	x			CPI Quarterly Emails - Version for external use	Product Marketing	Intermediary	10	Quarterly
50	x			Disciplined Equity Capabilities Brochure	Product Marketing	Intermediary	1	Annual
51	x			Disciplined Equity Capabilities Brochure	Product Marketing	International	1	Annual
52	x			UK Corporate Overview Flyer	Product Marketing	International	1	Quarterly
53	x			One Choice Target Date at a Glance	Product Marketing	Intermediary	1	Annual
54	x			One Choice Target Risk Flyer	Product Marketing	Direct	1	Annual
55	x			Cif at a Glance Flyer	Product Marketing	International	1	Annual
56	x			AC Ahs Long-Short Product Presentation	Product Marketing	International	1	Quarterly

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

