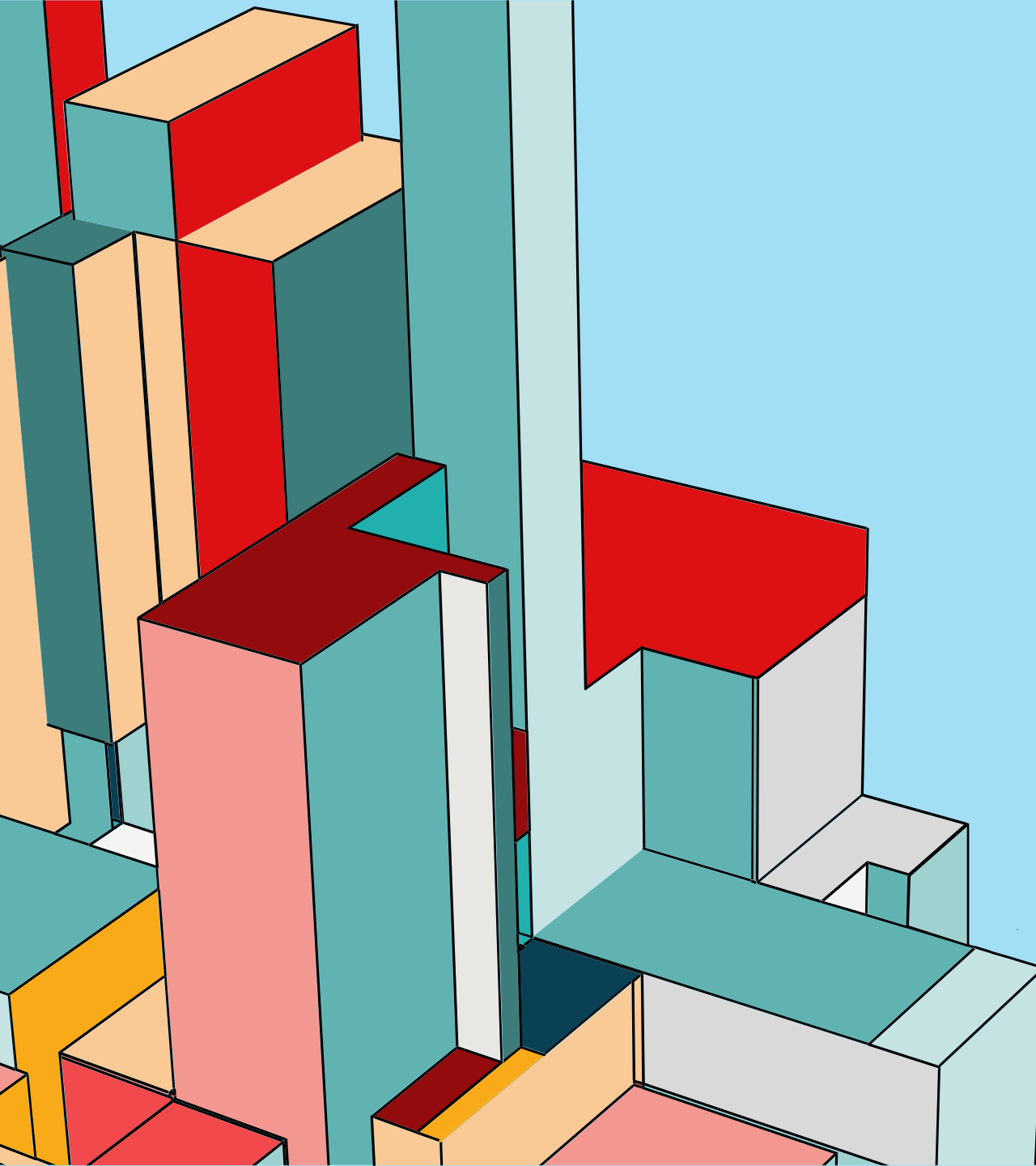


An abstract composition of various 3D rectangular blocks in shades of red, orange, teal, and light blue, arranged in a layered, architectural style on the left side of the image. The blocks have black outlines and are set against a solid light blue background.

APPLYING AN AGENCY MODEL TO CORPORATE MARKETING

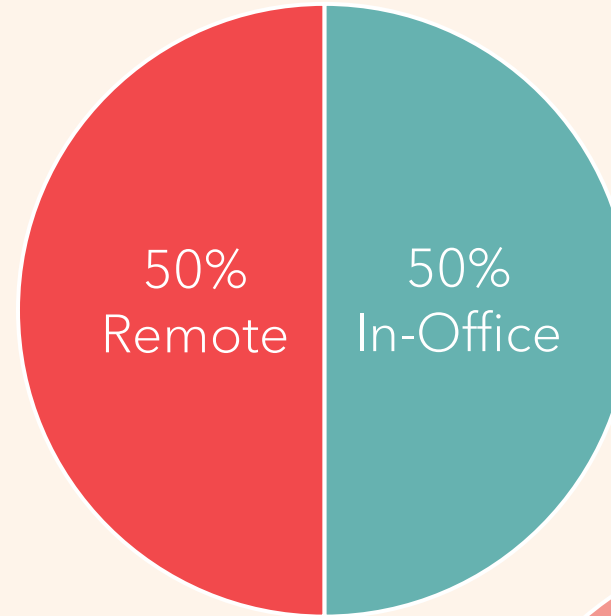
22 years of experience

BOSTON & NYC

2002-2007

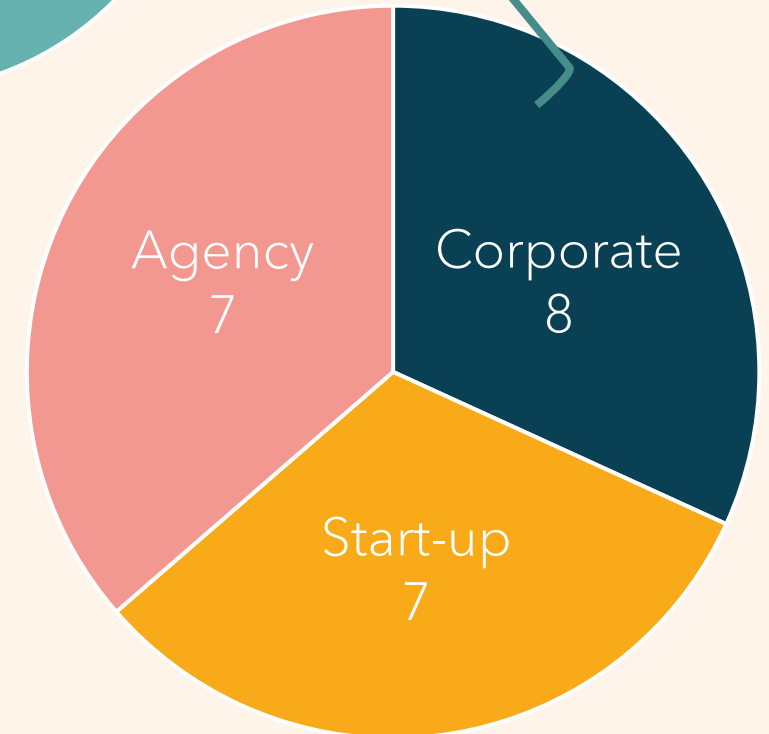
CONNECTICUT

2007-2025

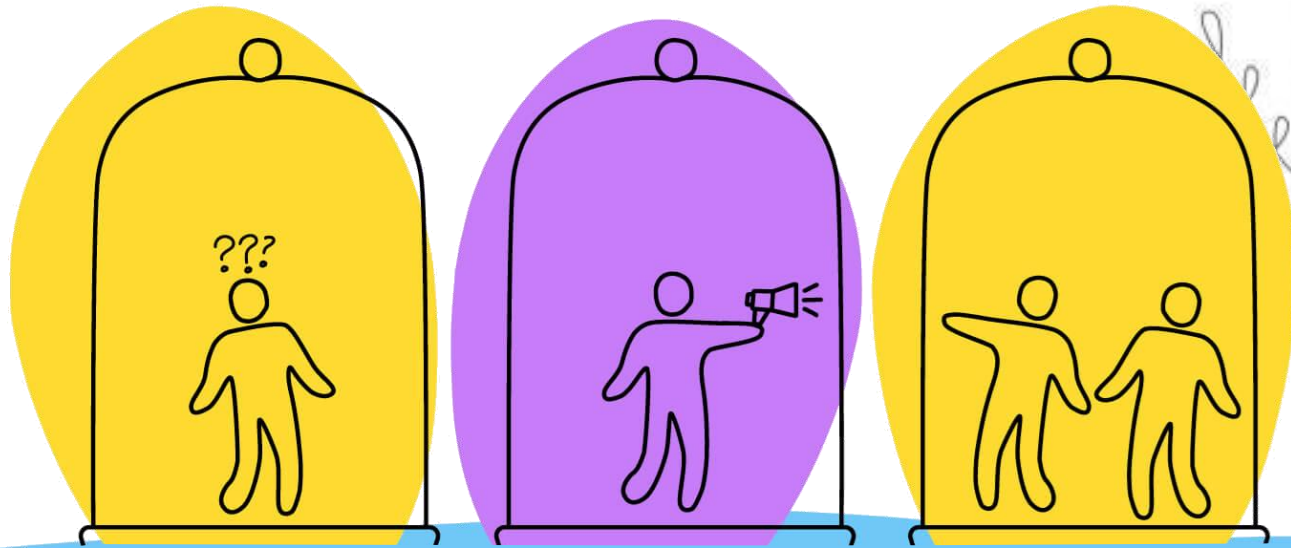


0 years
Corporate
In-Person

12 years of
experience before a
corporate job.



**TOUCH
EVERYTHING...
DON'T TOUCH
ANYTHING.**



DOWNSIDE OF SILOS

Specialized teams intended to help manage complexity, accountability, focus, efficiency.

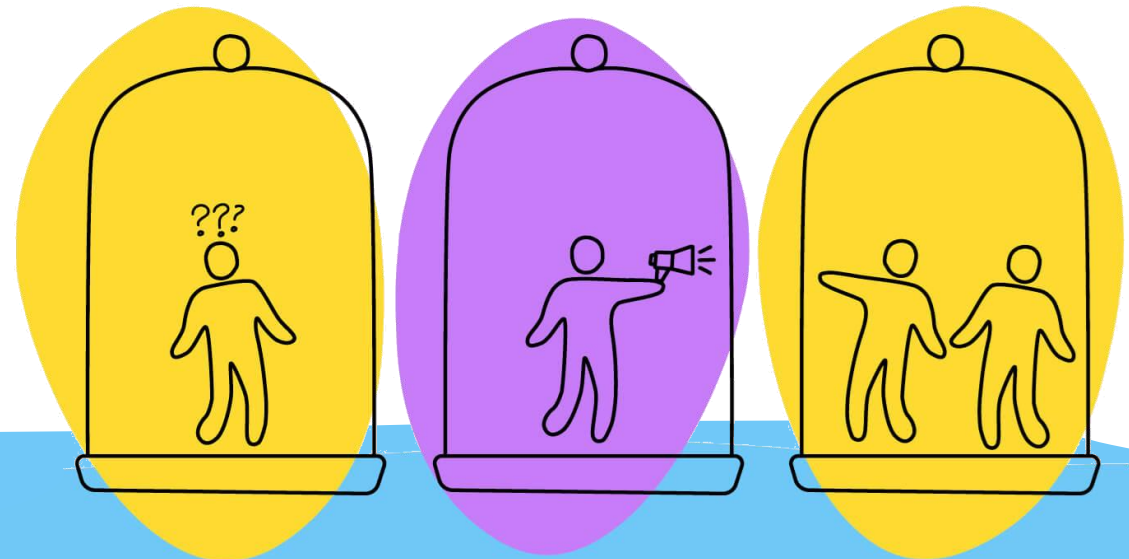
Risks:

- Narrow vision, lack of information flow
- Lack of concern for outside departments
- Hyper-focus on their tasks and objectives.

“Leads to bureaucratic rivalry, corporate infighting, and the left hand not knowing what the right hand is doing.” *Felix Martin*



Gillian Tett, author of *The Silo Effect*
YouTube Presentation



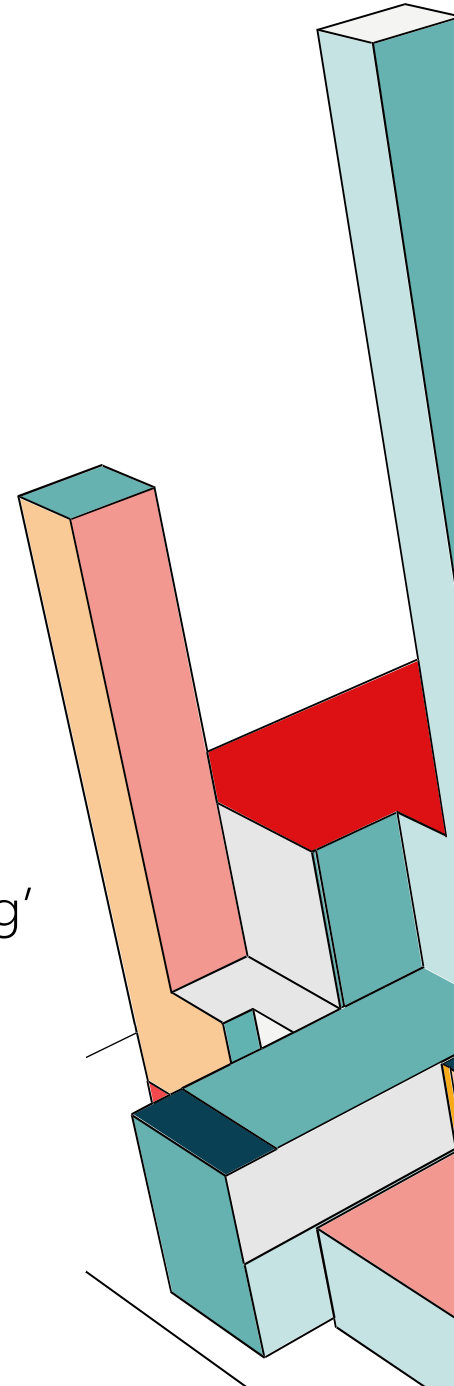
COMMON CORPORATE CHALLENGES:

Planning

- Lack of strategic alignment between teams, multiple 'owners' on large initiatives
- Meeting swirl, repetitive conversations, lack of team representation
- Resistance to change, lack of change management skills
- Remote teams with varying levels of engagement need to collaborate

Execution

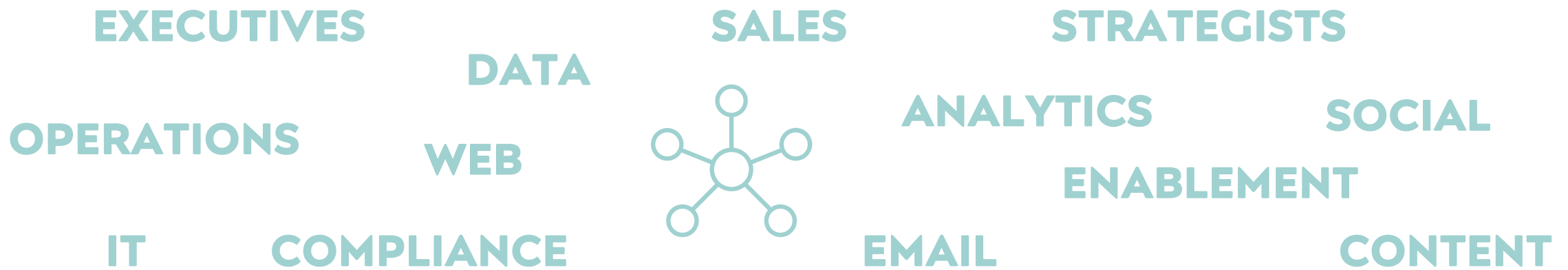
- Ad-hoc requests dominate bandwidth, innovation gets deprioritized, only 'reacting'
- Implementation teams don't receive requirements 'in their language', adds time
- Inadequate tracking of progress or ability to show success
- Closed-loop ROI/KPI reporting: not prioritized, owned, or baked-in
- Insufficient resources, lack of technical expertise

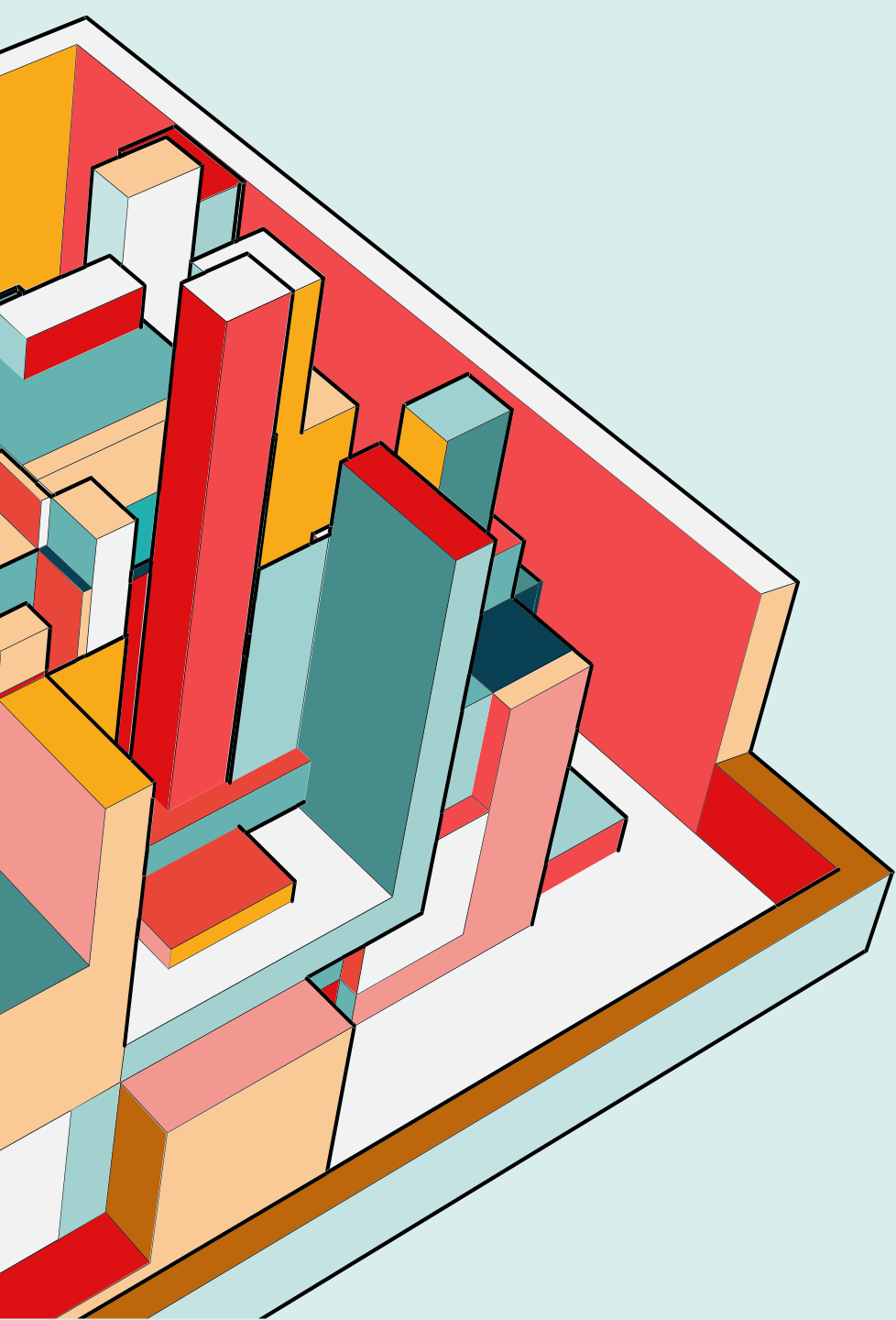




MARKETING IS “NEEDY”

- Need to **innovate to compete** = investing time into unknown outcomes
- Technology and data **need to be integrated** to be valuable to Sales
- Success is dependent on **multiple team's resources**





HOW CAN MARKETING BE MORE EFFECTIVE?

Apply a framework that
enables collaboration
across external teams.

DELIVERY TEAMS: AGILE FRAMEWORK

- Sprint Planning/Prioritization: Full-team alignment to prioritize the backlog, estimate timelines
- User Stories: Capturing what success looks like, objectives
- Backlog Creation: Strategic intake of requests to limit risk of not delivering work.
- Scrum Master: Facilitates and time-boxes meetings, keeps teams focused
- Daily Stand-up: What was accomplished yesterday, today, any blockers. No refinement!
- Kanban Board: Centralized platform to track and visualize work, report on capacity, progress
- Refinement Sessions: Projects are discussed in detail before committed to completing
- Acceptance Criteria: The "definition of done" or "success"
- Requirements: Detailed, documented project details into actionable tasks
- Identify Blockers/Dependencies: Clear understanding of what needs to happen to deliver work
- Assign Task Owners: Who is best to do the work, what do they need from others?
- Sprint Cycles: Established timeframes during which teams are hyper-focused
- Releases / Delivery: Incremental deployment, continuous delivery of value – not waiting for perfection.
- Sprint Review: Present results, demo completed work and discuss outcomes, gather feedback
- Sprint Retrospective: Aim to continuously improve how the team works together, not just outcomes.

But does Agile work for marketing?

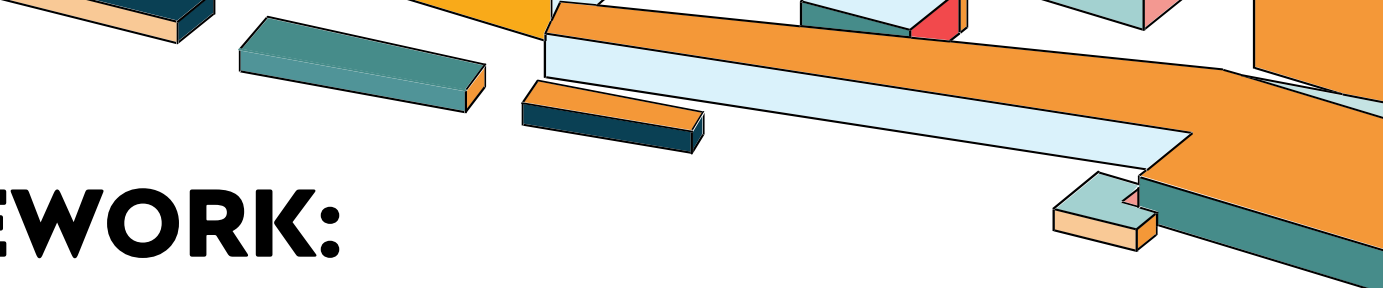


EXPERTISE & EFFICIENCY

Agencies are valued for...

innovation, project management,
accelerating internal knowledge.

- Highly efficient, organized, keep costs low
- Project manager aligns and delegates
- Access to expertise, dedicated resources
- Required to show results
- Growth-mindset, ready to optimize
- Partnership: How can we help next?



THE AGENCY FRAMEWORK:

1. **Discovery:** What are the challenges, objectives?
2. **Use Cases/Pilot:** Specific projects flagged as high-impact that drive all requirements
3. **Project Plan:** What will success look like and how will we get there?
4. **Supports Change Management:** Third-party expertise to provide future vision, validate value
5. **Resource Allocation:** Who is best to do this work, make them available.
6. **Project Manager:** Aligns resources to translate goals into requirements
7. **Kick-off:** Align all stakeholders on goals and what is in scope.
8. **Phased Approach:** Limit scope-creep, identify areas for optimization, extend ROI
9. **Build & Testing:** When ready, dedicated teams are approved to move forward
10. **Status Meetings:** Regular cadence for check-ins, what was done, ownership of next steps
11. **Performance Reviews:** Required to report on if goals were accomplished
12. **Phase 2 / Optimization Plan:** Always thinking ahead, how to 'keep the business'

BIGGEST IMPACT?

Projects operate as less of a disruption and more of an opportunity.

Teams feel like their time is being respected.

You begin to **see movement**, even if slowly.

Knowing what to expect and what is needed **reduces swirl**.

It becomes easier to **showcase wins**.



FRAMEWORK OVERLAP & GAPS

Agency	Agile
Discovery	User Stories, Sprint Planning, Identify Blockers
Use Cases / Pilot	User Stories, Sprint Planning, Identify Blockers
Project Plan	Refinement, Acceptance Criteria
Project Manager	Scrum Master
Status Meetings	Daily Standup
Resource Allocation	Assigned Task Owners
Phased Approach	Sprint Cycles
Build & Test	Releases
Performance Reviews	Sprint Reviews, Retrospectives
Next Phase / Optimization Plan	Backlog Creation, Sprint Planning
Kick-off & Change Management	Delivery teams may be left out of strategic meetings that align them to the larger goals.

LAUNCH YOUR AGENCY

Prepare for Success

1. **Discovery & Use Case Development:** Require sales management, tech and analytics teams. Product owners connect challenges to solutions, encourage resources to think big, show innovation is welcomed.
2. **Change Management:** Socialize a business case, note hesitancy, ensure uncertainty gets extra time, showcase successes often. Don't go dark and then go-live.
3. **Phased Approach:** Be realistic about what can be achieved, don't aim for perfection before starting the work. What is your ideal cycle. Monthly recommended.
4. **Ask Analytics Early:** If you need dedicated/new reports to show success, create the requirements now. Takes more time than we expect.



PROMOTE YOUR AGENCY

Organization & Communication

5. **Project Manager:** One owner. Great relationship with teams, understands tech being used, must attend delivery team meetings. Responsible for managing a backlog.
6. **Status Updates:** Recurring meetings pre-scheduled, require updates via email, monthly stakeholders meeting.
7. **Documentation:** Objectives, project plan, timeline, resources. Meeting recaps and next steps delivered after every meeting.
8. **Performance Reviews:** Invite all teams including Sales, showcase goals, be open with what didn't work, and what's coming next.

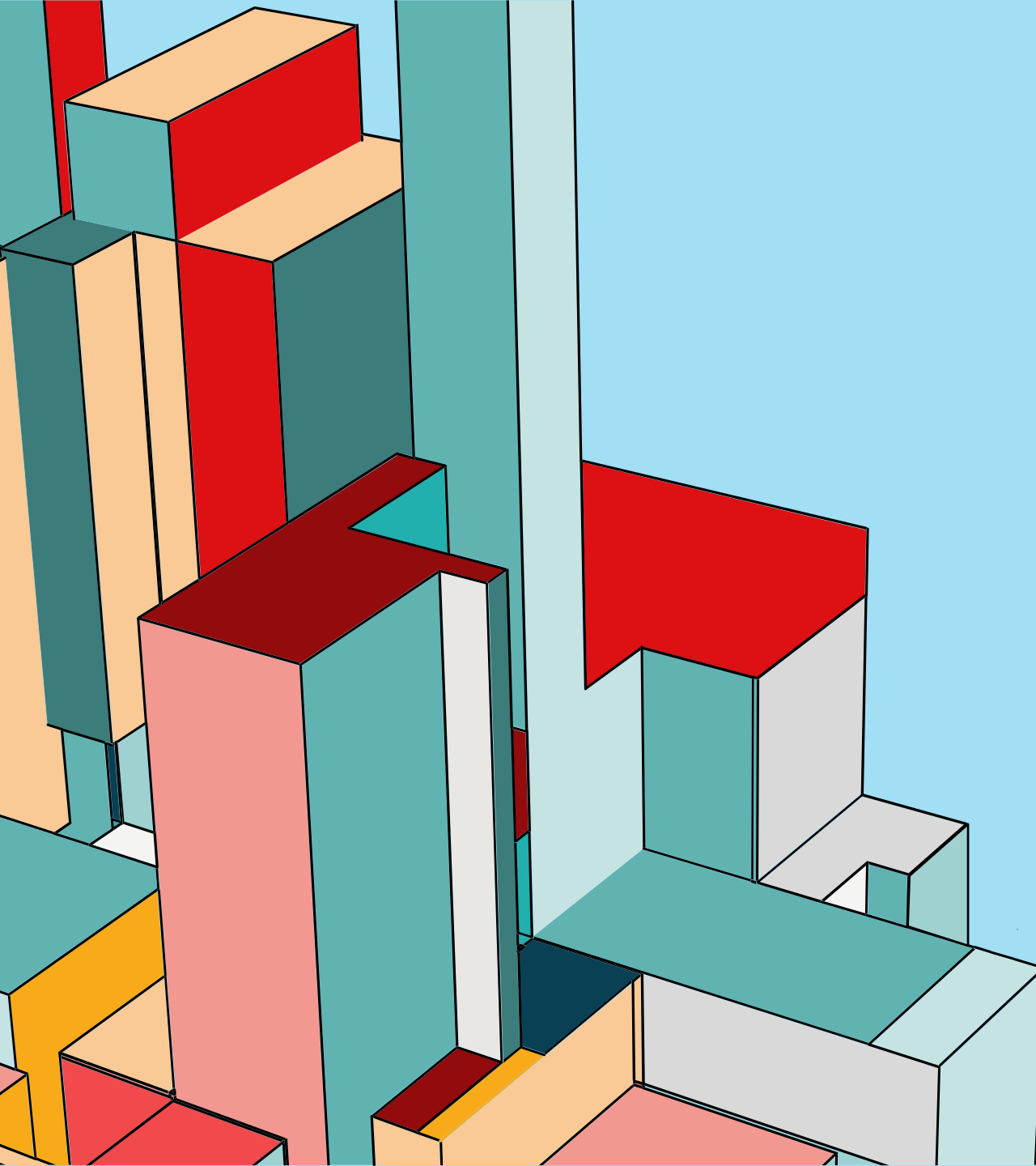


DEMONSTRATE ONGOING AGENCY VALUE

Partnership & Collaboration

9. **Retrospectives:** Cross-functional review of how we worked together. Gets better over time. Ask for feedback, ask how to support teams better.
10. **Phases/Backlog vs. Optimization:** These are different. Build at least one optimization goal for what was built into the next phase.
11. **Resource Development:** Require training. Let resources present their plan, timeline. Hold them accountable.



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THANK YOU!

Lara Zier

860-849-3024

lara.zier@voya.com

