Rising to the challenge:
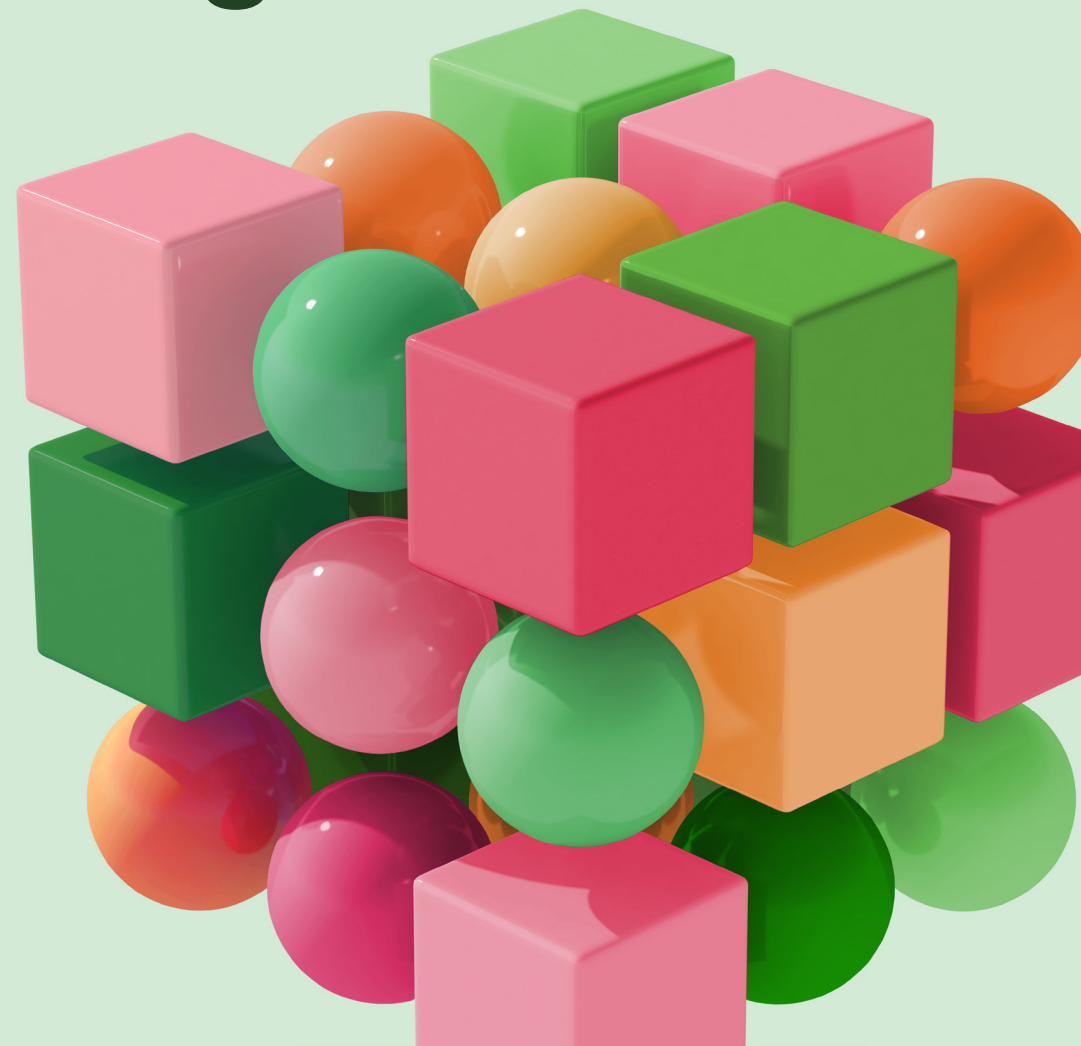# Cost-effective strategies for agile marketing

Learn how marketing teams do
more with less by working smarter.

Airtable

Introduction

"You need to be more creative about how you use your time and resources. That's when magic happens."

— Adam Broitman, partner at McKinsey.

Greater scrutiny. Changing pressures. An uncertain economy. If you're a marketing leader, you don't need reminding that 'normal' is nonexistent. The pressure you're under to drive revenue and support customers refuses to bow to your daily reality: a smaller team and a tighter budget.

"What we're seeing right now is that marketing teams have to pull back in certain areas," Adam Broitman, partner at McKinsey and a global leader in digital marketing operations and technology, told Airtable in a recent interview. He encourages marketing leaders to prioritize brand building and customer service because "we've seen from past downturns that those who double down in these areas come out the other side in a much better place than those who don't invest."
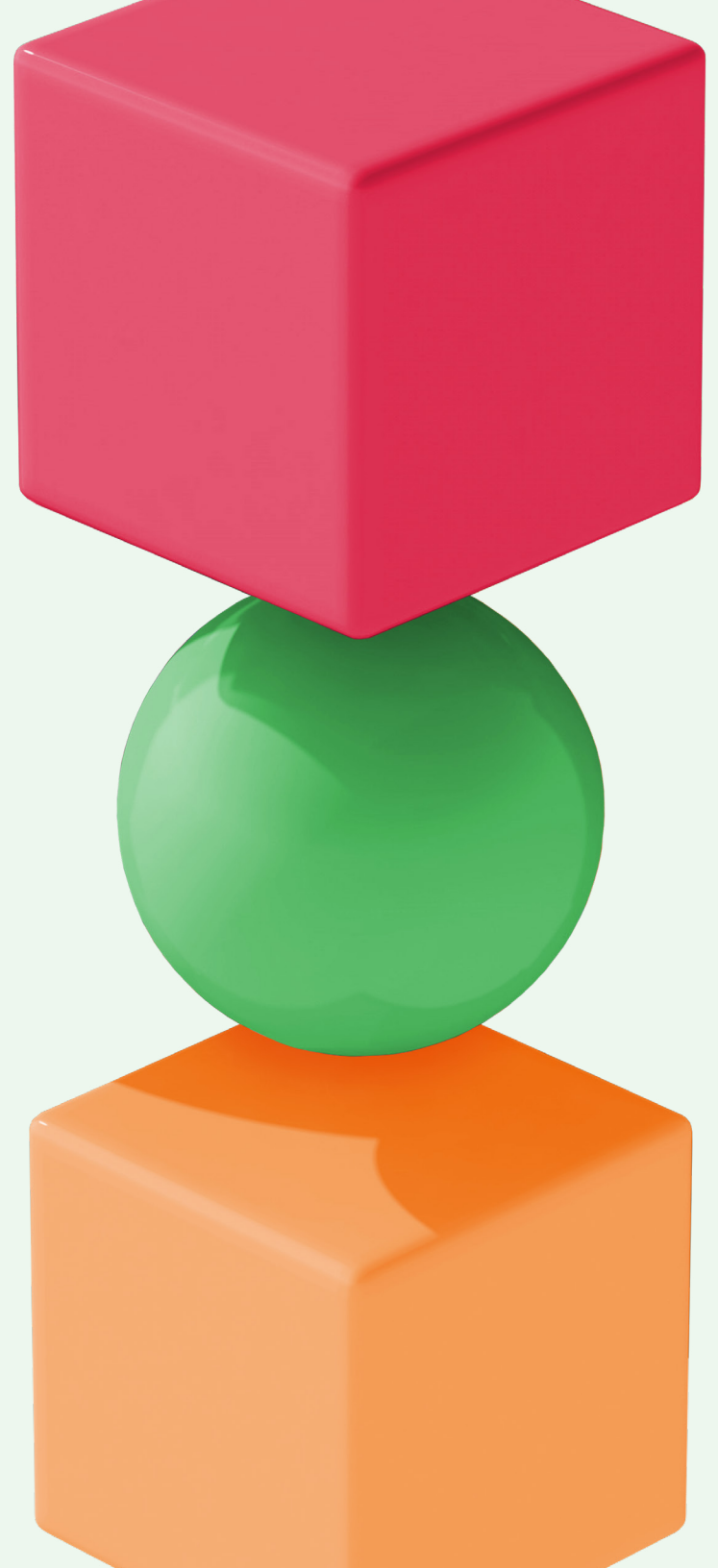
Instead, he recommends marketing leaders slow hiring and use existing teams to do more: "Certainly, we don't suggest that your people work harder. What you need is to get your teams to work more efficiently."

If you're being told you need to do more with less—which seems impossible—you might just need to do things differently. This is an opportunity to change the way your team works to be more agile, more frugal, more lean, more effective, more sustainable. When budgets are tighter and goals are tougher, it's your job to inspire your employees to reimagine the way they work.

This ebook shows how world-class marketing teams overcome three common challenges to maximize efficiencies across data, tools, and workflows. It includes insights from an exclusive interview with Adam Broitman at McKinsey, as well as anecdotes from Airtable customers like TOMS footwear, Code & Theory, and SHI. Solutions will help you prioritize the right work and cut costs wherever possible. And stretch goals will challenge you to think creatively, explore new avenues, and embrace the changing nature of marketing work.

Challenges. Solutions. Competitive opportunities.

In the face of constant change, marketing leaders need to play defense and offense. Defense often means cost optimization or restructuring. And offense means embracing agility while exploring new technologies and avenues for growth (think: unlocking first-party data and wrangling AI).

To succeed in either play, you must solve three common pain points that lead to inefficiencies in marketing teams.

In In the following sections, we'll unpack each problem and propose three solutions (and three acompanying stretch goals) to help you stay agile and frugal in times of uncertainty.

1. The data problem:
   You can't access and action information

   Solution: Eliminate blindspots in critical data

   Stretch goal: Unlock data-driven decision making

2. The tool problem:
   Your martech is complicated, rigid, and pricey

   Solution: Choose tools that are flexible and connected

   Stretch goal: Manage first-party data differently

3. The workflow problem:
   Teamwork is full of friction

   Solution: Centralize workflows to unlock connection

   Stretch goal: Augment automations with AI

The data problem:

You can't access and action information

When projects, timelines, budgets, resourcing, and performance data are stored in different locations, you can't find the information you need to make decisions quickly. Research from Forrester found that data silos sap 2.4 hours from employees' workdays, as the team wastes time searching for and parsing through duplicated information.

Siloed data isn't just irritating, it creates blindspots. When you're forced to jump between tools, spreadsheets, emails, and chat just to find the right information, you struggle to turn data into insights and you can't see how information connects across the marketing org. Opportunities stay hidden, experiments get lost, and you lose trust in your decision making.

These are the blindspots we commonly see in marketing teams:

1. **Invisible insights:** Disconnected data leads to lost revenue and missed opportunities.

2. **Team-level blinders:** Disjointed workflows between regions and teams increase business risk and misalignment.

3. **Siloed tracking:** Disparate tracking of vendors, resources, activities, and timelines leads to mistakes and slows production.

4. **Unused content:** Poor asset management degrades ROI and creates operational overhead and duplicative work.

Solution:

Eliminate blindspots in critical data

Within every marketing team, there is a set of data that is critical to you achieving your goals—it might be your production pipeline, campaigns calendar, event schedule, or retailer locations. This data should not be fragmented in different places; it must be aggregated, connected, and accessible to those who need it.

If launch plans are the heartbeat of your marketing efforts, for example, then information on upcoming releases, target customers, timelines, assets, owners, creative requirements, budgets, and go-to-market dates should be captured in a living, breathing source of truth. Adjacent and connected to that source, you might track promotional channels, resourcing, regional strategies, and organizational goals.

We've seen teams (like the team at TOMS) achieve at least 20%-30% time-savings after aggregating their critical data in a single source. This team now spends less time sifting through disparate spreadsheets and tracking down various feedback, and more time sourcing, designing, and promoting TOMS shoes and its philanthropy.

Limit the number of sources your team must consult to fewer than 5: A recent survey of 300 marketing leaders found that teams who consult more than 5 sources of information are 16% more likely to stress about duplicative work, spend 3 additional hours in meetings each week, and parse through 8% more duplicated data, compared to those who consult fewer than 5 sources.

Take action:

Aggregate data in a source of truth

A source of truth offers visibility into your critical dataset and provides the most accurate, up-to-date version of information to anyone who needs it. Every key stakeholder should have visibility into the same information, in real time—pulling your team out of status checks and "where is what?" questions and freeing you to focus on the real work.

Here's how your team can get started:

1. **Locate all the places where data and information is stored across the team.** Identify all information relevant to your marketing efforts (everything from campaign timelines to audience research). And locate all the places where that information is stored, whether that's in spreadsheets, docs, project management tools, systems of record, or emails.

2. **Find commonalities within the data so you can start matching and merging taxonomies.** Create a shared language across Marketing so that every team has the same nomenclature for critical terms such as "campaign," "project," and "asset." This consistency enables you to capture and connect your metadata in a source of truth—eliminating duplication or confusion, and streamlining reporting.

3. **Assign owners to build and maintain the source of truth.** These members of your team should "verify" the critical data that informs your team's work, and then pull all relevant information into a centralized hub. This aggregation allows cross-functional partners to embed trusted data into their workflows, and makes it easier to maintain the integrity of the data going forward.

You can’t
access and
action information

Stretch goal:

Unlock data-driven decision making

Now that your most important information is pulled into a single source, you can start experimenting and tracking results in a central location. For example, you might track the reach of different social campaigns across key audiences, or you might A/B test email subject lines or landing page copy to see what messaging converts most effectively. Capturing this performance data alongside information about workflows, resourcing, and spend will help you understand the effort and impact of marketing activities, and increase your pace of delivery and personalization.

Often, this type of testing is done through an operational framework (for example, agile marketing) that allows your team to iterate rapidly using discrete tests, and scale the experiments that are most successful. When all your critical data is aggregated in one place, it’s easy to visualize results in dashboards, share reporting with key stakeholders, and understand broader trends in testing and implementation.

“Great teams have a consistent, cross-functional operating model,” Adam said. “We employ the agile marketing

methodology to help our clients drive value. But I think any specific, well-defined operating model is critical to success. There are new channels, new tactics, nearly every week—how do you know what you should be doing if you’re not constantly testing?”

Challenge your team to experiment with new strategies in planning, prioritizing, executing, and promoting marketing work. Your competitive advantage will emerge as you gear every change toward increasing efficiencies and maximizing returns. “If I remember the last economic downturn, tremendous amounts of innovation came out of sheer need: People need to be more creative with how they use their time and resources. That’s when magic happens,” Adam said.

Airtable recently sat down with McKinsey to talk about embracing workflows for agile marketing.

Watch the webinar

9   Airtable   Rising to the challenge: Cost-effective strategies for agile marketing

The tool problem:

Your martech is complicated, rigid, and pricey

If you're facing tighter budgets and steeper goals, you're likely questioning the number of tools your team is using, and why. Recent research from Forrester found software adoption happens at such a clip that, on average, enterprise companies have 367 tools scattered across the org. What you don't realize—as you train Marketing on a new campaign management tool, or you introduce a new content calendar—is how this narrow implementation risks trapping data, deepening silos, and pulling the team in disparate directions.

Why your tools aren't cutting it:

1. **Cumulative cost:** SaaS saps your marketing budget, even though you have limited visibility into the value it offers.

2. **Restrictive rigidity:** Specialized tools force your team into inflexible processes that detract from the work itself.

3. **No connection:** Locally-adopted tools exacerbate silos and don't connect to other workflows or teams.

4. **Poor adoption:** Employees abandon any technology that slows them down or that clashes with the way they work.

"Many times organizations don't have a clear vision for what they will do with tools when they purchase them. Therefore, one of two things happen: either the time to value is very slow, or they're not used at all."

Adam Broitman
Global Leader in Digital Marketing Operations
—McKinsey

Solution:

Choose tools that are flexible and connected

If you're evaluating your tech stack, start by identifying the most important use cases for your team. These should link directly to the critical dataset you identified in the previous section, for example if your critical dataset involves product SKUs (like TOMS), then your most important use cases are likely digital asset management and calendaring.

Adam recommends what he calls a "use-case-backed approach" to your martech. "The question is not 'what are we doing with the tools today?' but, 'what are our high-value use cases, and what value can these tools unlock?'

The team at Code & Theory, for example, moved from a "tool-agnostic" culture (where every team used their own tools and workflows) to connecting 18 teams and 500 people. How? By choosing a tool that's flexible enough to address multiple use cases, and by starting with one of the agency's most important

use cases: Production. After building the production handbook, the team built a contract tracker and a budget estimator on top of the same solution. Now, multiple teams share information freely via a single platform, and the team saves more than 10,000 hours a year.

Build use-case specific workflows without fracturing your team across multiple tools or sources of information: Your workback plans for Campaigns and Creative might look entirely different, but they're run and managed by the same platform—and they're connected with shared data.

Rising to the challenge: Cost-effective strategies for agile marketing

Take action:

Streamline and connect your martech stack

In evaluating your tech stack, choose solutions that enforce connection between teams and eliminate silos.

Consider these criteria:

1. **Reduce your reliance on point solutions that solve single, tangential use cases.** These types of tools (for example, Sprinklr, Opal, Kapost, Bynder, Widen) bloat your tech stack, deepen silos, and trap critical insights. They sometimes present a steep learning curve (resulting in unused functionality), and they can't be customized to meet other organizational needs.

2. **Pull your work out of spreadsheets, docs, and emails.** The spreadsheet-centric approach isn't scalable (you end up with unstructured, redundant data that's disconnected from relevant workflows), and it isn't secure.

3. **Connect core systems of record.** These tools offer robust functionality, but they come with challenging interfaces that are difficult to use and customize—this creates fractures between teams who use them and teams who don't. These tools are also pricey; by connectingthe data within every system of record, you gain greater value from each contract.

Stretch goal:

Manage first-party data differently

As you're building solutions for specific use cases, think through the now-urgent need to ask permission to gather, store, and action customer data, following the demise of third-party cookies. Your martech should be able to protect customer privacy by turning first-party data into anonymized insights that elevate the entire customer experience.

"We refer to it as data relationship management (DRM), which focuses on ensuring that the collection, storage and activation of data is inline with consumer expectations," Adam said. He emphasizes the need for highly customized tools and workflows depending on your use case and industry.

"Orchestrating DRM effectively requires efficient and very customized processes. It means having tools that are very specific to your use case, because data collection in auto is going to look different from travel or retail. So very bespoke processes are critical for marketing teams in any industry."

The workflow problem:

Teamwork is full of friction

When your workflows aren't connected or streamlined with automations, cross-functional collaboration (no matter how simple) becomes a struggle. Workflow friction is the unanswered questions, the uncertainty of ownership, and the missed notifications that delay every deadline. It increases the amount of time, money, and resources that go into every marketing activity, and is the reason only 1 in 5 marketing teams meet their deadlines consistently.

Friction leads to:

1. **Lost revenue:** 31% of business leaders said they saw revenue decrease as a direct result of organizational silos, inaccurate data, and broken work processes.*

2. **Risk of mistakes:** 46% of business leaders say poor business processes increase the risk of manual errors.*

3. **Burnout and stress:** 86% of marketing leaders report their team is stressed. Contributing factors include increasing workload, accelerating requests for content and campaigns, and constantly changing responsibilities.*

4. **Time sucked into meetings and non-core work:** On average, marketing leaders spend 10 hours a week on non-core work (defined as: administrative work and meetings that don't directly contribute to deliverables and goals) and this increases to 12 hours per week at companies with more than 5,000 employees.*

Adam sees workflow friction bubble to the surface when teams are forced to send multiple emails and share multiple docs, just to get work done. "It's just not efficient; there's a lot of commoditized work that goes into creating very simple things," he said. Adam encourages marketing leaders to centralize workflows and increase automations so they "don't have to pull back on the resources that drive growth."

*These insights were pulled from Airtable's Marketing trends report and recent Forrester research.*

Solution:

Centralize workflows to unlock connection

If you centralize workflows in one shared platform, you can see the flow of work from tip to tail—helping you identify opportunities for adding automation and boosting efficiencies. Recent research found that teams with 'moderate' to 'very efficient' workflows are over 5x more likely to 'almost always' meet their objectives/goals, compared to teams with inefficient workflows (34% vs. 6%).

Agile teams often assign owners of workflow design to strengthen this process: "Workflow design is, I believe, a role within an organization," Adam said. "The workflow designer constantly tracks how people are working, monitors the velocity of the work, and constantly tries to improve the velocity of the work—not by getting people to work harder, but by finding where the inefficiencies are, and smoothing them over with more efficient processes and automations."

Rising to the challenge: Cost-effective strategies for agile marketing
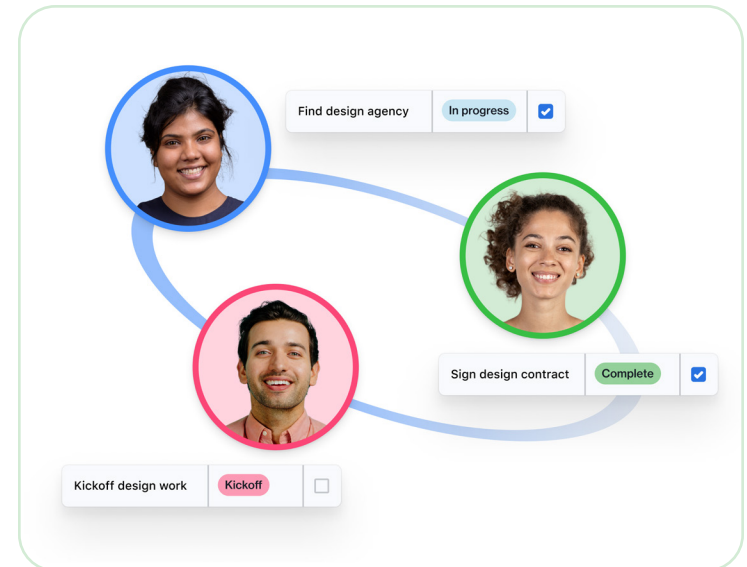
Take action:

Design marketing workflows to be more efficient

Whether it's one person's job, or a team-wide effort, workflow design and optimization is an ongoing effort to maximize efficiencies and help your team "do more with less".

Here are four ways to get started:

1. **Capture briefs and work-back plans in your source of truth.** This visibility aligns cross-functional stakeholders from the outset (reducing thrash). And it means that Content knows when a launch date has shifted, and Creative is aware of when to start work.

2. **Give adjacent teams dedicated places to provide input.** Giving cross-functional partners specific places to provide feedback and request assets helps pull your team out of ad-hoc,"urgent" reactiveness, and into clearer prioritization and planning.

3. **Identify repetitive tasks and start automating.** Automating manual work like handoffs and team-wide notifications helps reduce the number of tasks (and potential mistakes) that need to happen to ship any marketing work.

4. **Schedule ahead time to reevaluate your workflows.** Frequently map your workflows to better measure and reduce the time, money, and resources that go into producing each marketing asset.

Stretch goal:

Scale your marketing workflows with AI

Enterprise companies that successfully implement generative AI tools like ChatGPT stand to gain efficiencies, save on headcount, increase revenue, and automate mundane tasks freeing up their workforce to do more with less. According to Adam, this technology will change—rather than replace—the role of a marketing leader. Those who embrace it will come out of this downturn stronger than those who do not.

"I don't think that humans will ever lose their value in the face of AI and advanced automation," Adam said. "I think the roles simply need to change. And the way in which humans and machines work together just changes the jobs to be done for humans."

In a recent talk at the Airtable Leaders Forum in New York, Adam added: "Low/no-code and AI represent the future of work for marketers, as companies move to [embrace] automated workflows, dynamic dashboards, integrated processes, and clear visibility."

The untapped potential in AI for marketing teams was echoed by Scott Belsky, author, entrepreneur, and investor, who spoke the same event: "Creative confidence is going up for humanity," Scott said, predicting that AI will unlock a child-like playfulness when it comes to making art, designing graphics, and writing copy. It will "free the ingenuity of people" as we use AI to do more mundane, repetitive tasks. And it will help us better personalize web experiences and apps.

An example of this evolution and creativity comes from Howard Shaw, director of technical strategy for SHI International, who uses ChatGPT to write custom code to automate manual tasks. The team then integrates that code with Airtable to create apps to manage things like scheduling and resource planning. Howard says it's accelerating SHI's ability to build apps at scale.

"[ChatGPT] wrote enough code in two minutes to save me 20 hours worth of work. It blew my mind," Howard said. "Since implementing Airtable, our division grew 54% in revenue and margins last year, and 25% in headcount. ChatGPT is only going to accelerate that growth."

Read more about Airtable AI

Conclusion

In the face of tighter budgets and smaller teams, marketing leaders must change the way they work to be more efficient and connected. Certainly, keeping up involves embracing innovations like AI, which are transforming the marketing landscape. But, for your team to succeed in moving quickly, you must first be able to move together—by bringing visibility to critical data, consolidating disparate tools, and smoothing cross-functional workflows.

In summary:

1. Sharing data via a single source empowers your team to move in a unified direction and strengthen the impact of every marketing deliverable.

2. Choosing tools that offer use-case flexibility, without sacrificing global alignment, strengthens cross-functional initiatives and cuts the cost of your martech stack.

3. Centralizing workflow design helps you unlock automations to save time, cut costs, and accelerate your output.

The potential of every change is best seen within the commentary from Adam at McKinsey, and in the examples from TOMS, Code & Theory, SHI. It's time to reimagine "doing more with less" and, instead, do things differently. That's when the magic happens.

Rising to the challenge: Cost-effective strategies for agile marketing

About Airtable

Airtable enables teams to work the way they want while also staying aligned, allowing them to do their best work, together. With the Airtable Connected Apps Platform™, teams can build custom apps on top of shared data to best support their unique workflows— from managing campaigns to launching products to tracking applicants. This helps strengthen alignment across teams, boost employee productivity and efficiency at scale, and reduce costs and risks through tool consolidation.

Learn more   Contact sales

Rising to the challenge: Cost-effective strategies for agile marketing