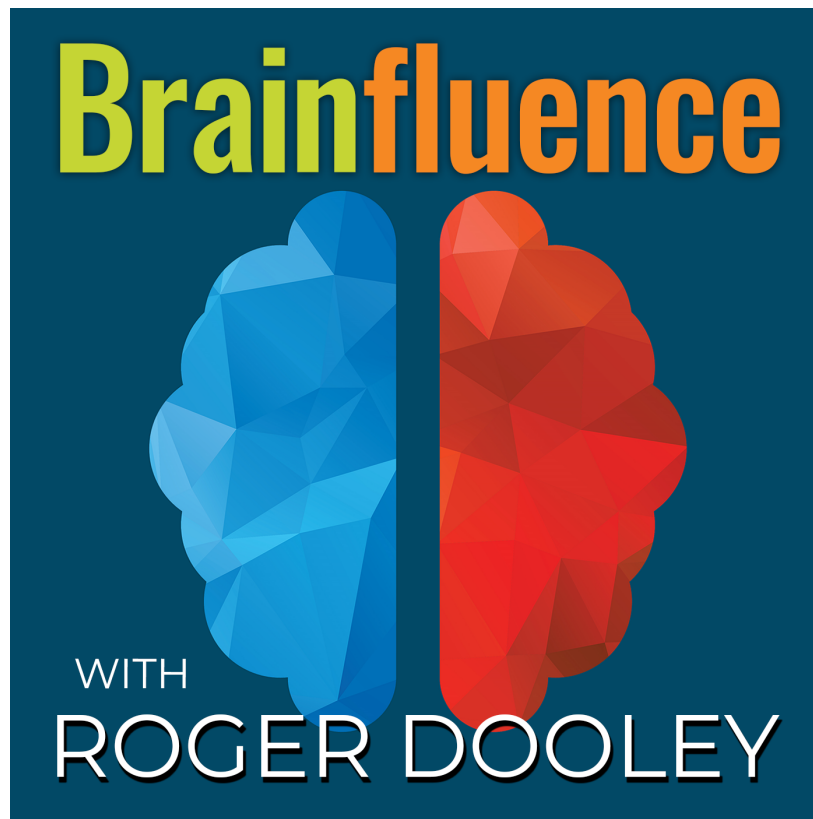


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Full Episode Transcript

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Roger Dooley

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Welcome to Brainfluence, where author and international keynote speaker Roger Dooley has weekly conversations with thought leaders and world class experts. Every episode shows you how to improve your business with advice based on science or data.

Roger's new book, *Friction*, is published by McGraw Hill and is now available at Amazon, Barnes & Noble, and bookstores everywhere. Dr Robert Cialdini described the book as, "Blinding insight," and Nobel winner Dr. Richard Claimer said, "Reading Friction will arm any manager with a mental can of WD40."

To learn more, go to [RogerDooley.com/Friction](https://www.RogerDooley.com/Friction), or just visit the book seller of your choice.

Now, here's Roger.

Roger Dooley: Welcome to Brainfluence. I'm Roger Dooley.

Today's guest is a leading voice on Agile marketing. Jim Ewel co-organized the first meeting of Agile Marketers and co-authored the Agile Marketing Manifesto. Today, his blog is one of the most trusted sources on Agile. Jim runs an Agile marketing consultancy and his new book is *The Six Disciplines of Agile Marketing: Proven Practices for More Effective Marketing and Better Business Results*. Welcome to the show, Jim.

Jim Ewel: Thanks, Roger. Glad to be here.

Roger Dooley: Great. Well, I think that probably many of our listeners have heard about Agile software development. That seems to be, not so in our new buzzword, it's been a buzzword for years and years now, but it's probably less of a buzzword in marketing. So for those folks who aren't

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doing it or perhaps aren't that familiar with it, explain what Agile marketing is and how you apply the Agile principles. I realize this is what the entire book is about, but let's give the capsule version of how Agile works in marketing, Jim.

Jim Ewel:

So Agile marketing takes its inspiration from Agile software development, but it has a slightly different set of values. Okay. So the first value responding to change over following a plan, that's the same between Agile software and Agile marketing. Okay. But other values like moving from a campaign approach to continuous improvement. Okay. That's a very different thing. Right? Developers don't do campaigns. Okay. So I like to think of Agile marketing. I always describe it to people, like if I run into them at a party or just talking to him casually, as what I would call a modern operating system for marketing. It could be because I'm an ex Microsoft guy, I think in terms of operating systems, but we've been doing marketing the same way for basically 50 years. I learned marketing back in the '70s, okay, when I went to college.

Jim Ewel:

And what I learned back then about writing yearly marketing plans, and what's called the 4 Ps of marketing and all that sort of stuff. I mean, to a great extent, that's what people do today. Yes, we have digital marketing and some things are different, but the way that we actually organized marketing and the way that we try to get things done is the same as what we did 50 years ago. And that's not really appropriate today. Okay. In the preface to the book, Scott Brinker, who wrote the preface, he describes it like, you've got this modern jet airplane of digital marketing and all the things that you can do today and you hook six horses up to it with this old methodology of how you do things, run out there on the tarmac with your

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six horses and your shiny new jet airplane, it doesn't fit. You need something more modern in order to operate modern marketing. And that's what Agile marketing is all about.

Roger Dooley: Right. And I guess a key driver is the fact that so much marketing is digital now, right Jim? Because you've got... In the old days, I remember those old days. If you were doing magazine advertising or any kind of print advertising, your lead times might be months out and be another month or two after that, before you'd have an idea whether that ad was working. So you pretty much had to do these campaign type things where you say, okay, we're going to maybe either run some tests or more likely, we're going to decide what we think the best ad is going to be and then run that for a while and we'll see what happens. And maybe after six months, we'll be able to evaluate it and revise our strategy or double down on it or something. But obviously today you can get results back in as little as a few hours, in some cases, if you've got sufficient volume. So that approach doesn't really work anymore.

Jim Ewel: Yeah. There are a number of factors that are moving people to Agile and you mentioned one of them is the shift to digital, right? Some other factors are the pace of change. So if you think about last year 2020, and if you wrote a marketing plan at the beginning of 2020 in January, and then COVID hit starting late January, February, maybe it hit your business starting in March, I mean, you had a shift on a dime. I was talking to one of my clients who they're very heavily dependent on the travel industry. Right? And in March, their business dropped like 50%. I mean, because who was traveling at

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that point. Right? And so they had to completely change what they were doing and start to have new offerings. And one of the things he said to me is that if they had not adopted Agile a year and a half before COVID hit, he didn't think they would have been in business.

Jim Ewel: Okay. So that's one of the factors is the pace of change. Another is the shift in power to the buyer, is the way I think about it. So let me give you an example. Let's say somebody goes into Best Buy and they take advantage of all the experts that are in Best Buy. They talked to the guy there about what's the best printer to buy and all this sort of stuff. Well, they can take their device here. Right? And they can instantly be on Amazon and compare the price that they get on Amazon to the price at Best Buy. And so the buyer has a lot of power there that they can shop around where they want. And if you aren't adding additional value, it's very easy for the buyer to go somewhere else. So there's this shift in power to the buyer.

Jim Ewel: And by the way, that's not just in consumer retail, as I mentioned in Best Buy, that's in B2B too. There really is a shift in power to the buyer. And then the other thing that is happening is that marketing is required to do more and more, and they aren't being given more resources to do it. And so you go talk to any marketer today and you ask them what's their number one problem, and they will say to you, lack of resources. I just don't have enough people, enough money to do everything that I want to do. So that means you got to be really, really good at prioritizing and really good at running effective campaigns rather than ineffective campaigns. Right? So those are the things that are driving people to Agile marketing.

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Roger Dooley: Right. Well, how does Agile actually conserve resources or save resources?

Jim Ewel: Well, what it does is it tries to get people focused on doing the right things. Okay. And what do I mean by the right things? Okay. So the first thing, if you're going to adopt Agile is that you want to get aligned with the business teams, particularly the sales team and senior management, to make sure that you understand, what are their drivers? What drives them? What are the metrics that they're measured on? What are their strategies? All that kind of stuff. Many times today, marketers are often accused by business people of not speaking the language of business, right? So I recommend that one of the very first things, this is the first discipline of the book, Six Disciplines of Marketing, is go out and get aligned with those salespeople, with the senior managers, those kinds of things so that you're doing the right things by them. Okay.

Jim Ewel: You're not doing what I would call vanity metrics. Okay. Vanity metrics are metrics that make us feel good, but they do nothing to move the business forward. Right? So agile helps us focus on those metrics that are actually going to move the business forward. Okay. The second thing that it does is that it helps teams determine not only the priorities, but how to deliver things without constant interruptions. So for example, we use a technique called Scrum. Okay. It's the same technique the software developers use. And the idea is that we plan a week or two's worth of work, okay. And we say, we're going to get this stuff done in that next week or two. Right? And we don't allow interruptions to that.

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Jim Ewel: If somebody has something new, we say, great, we'll put it on, what's called the backlog, and when we go to plan or next time, we'll consider that and do it, but we're not going to interrupt this stuff that we've promised in order to do this. Okay. And that helps marketing teams get more done because they're not constantly multitasking, they're not constantly context switching, they're not constantly being interrupted to do stuff that really isn't that important, all those kinds of things. So that's another way that Agile helps marketers get more done.

Roger Dooley: Well. So it's kind of interesting Jim, because I think you're saying in my mind, perhaps I was thinking, well, this is sort of a different form of project management for marketers, but really it is more than that. You're saying it's important to look outside, look to the other departments, understand their needs. And as you point out in the book, that applies to the customers as well. Now hopefully marketers are focused on customers and their needs, but it's more of a structured approach perhaps to be sure that indeed other parts of the company are collaborating and the customers are of not collaborating at least being understood.

Jim Ewel: Yeah, you're right. It is a structured method for doing that. So like for example, one of the techniques that we use to make sure that we're aligned with customers, is that we describe everything that we do in terms of these things called user stories, right? And user stories have three components to it. One is, who exactly is the user? And I mean, it seems obvious that you should say, well, this marketing is for so-and-so, but I'll tell you that when I work with marketing teams, oftentimes their orientation is towards themselves. They say, "Well, I want to generate

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some more leads." Okay. But what does the customer want? Okay. The customer doesn't care about your lead generation goal. Okay. The customer has something else that they want to do. Okay. So number one, define the customer. And don't just say as a customer. So there's the format, as a, whatever the customer. Don't say as a customer, say, as a buyer of electric cars who really cares about the environment, okay.

Jim Ewel: As opposed to a buyer of electric cars who wants to be in the latest, cool new technology and as an early adopter, right? Those two different buyers have very different needs and things that they're going to do. So define your buyer, what we call a persona. The second thing is, what is the buyer trying to do? Right? The idea is not for you to generate more leads, the idea is for you to help the buyer do they're buying. I always say nobody likes to be sold to, but everybody likes to buy. Right? It's kind of like, I'll go back to my electric car analogy. If a salesman comes in there and they're just trying to hard sell me on closing that electric car, forget that, that's not very interesting to me and I walk away from that salesperson. If they come in and they're trying to help me make the best decision and they're educating me about electric cars and why some are different than others and how you charge them and how you find charging stations.

Jim Ewel: I mean, I just went through buying electric car for my wife so this is top of mind. Okay. So if they educate me in the buying process, I'm much more likely to buy from them. Okay. And then the third part of the user story is what we call the so that, okay. It's kind of the emotional reason that people buy, because people buy from the heart, not the head. Okay. I mean, nobody has to have an electric car

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today. Right? But my wife wanted an electric car. Did she have to have electric car? No. I mean, she can go from point A to point B in the hybrid car that she had before, but it was important to her for various emotional reasons. And you have to identify those emotional reasons and sell to that emotion. Don't sell to the head, sell to the heart. So that's one of the techniques, the structured techniques that we use in Agile marketing to improve our marketing and get more customer focus.

Roger Dooley: Yeah. Jim is it possible to be just a little bit Agile or to ease into it? Or as you make the comparison to an operating system, like you can't switch from Mac to Windows or vice versa a little bit, because it's pretty much an all or nothing deal. What about Agile? Do you really have to sort of scrap what you were doing before and start fresh? Or can you sort of dip your toe in the water?

Jim Ewel: That's one of the beauties of Agile is that you can start where you are today. And I always tell people, adopt Agile in an agile fashion. And what I mean by that is start small, iterate and try to add a few additional things, okay? And then see how that works for you. And if it works, continue to do it, if it doesn't work, stop doing it and do something else. Okay. There are also different methodologies for doing Agile. I mentioned one already called Scrum. Scrum requires a little more learning and adjustment than does the other major methodology, which is called Kanban. Okay. So Scrum requires that you have a Scrum master that you have this thing called a marketing owner, that you learn a bunch of terminology about sprints and all this sorts of stuff. Kanban says, look, take your process, whatever you do today, right?

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Jim Ewel: So maybe you have a process in which you have somebody write a creative brief and you hand that over the creative team, they create it and then somebody looks at it and says, do I like that or not? And then you put out in the market and you test it, whatever your process is. Okay. Start there, okay, and then try to improve that process. Okay. So for example, instead of making everything about what I would call the highest paid person's opinion, HiPPO method, okay. Of whether this ad is better than this ad, why don't you start by saying, I can test that. Okay. So I'm going to put those two ads out in the market, show 50% of the customers this ad, 50% that ad, and I can determine which one's better rather than somebody's opinion, okay, in doing that. That would be a classic Agile thing to do because we're very data-driven rather than opinion driven. And that's one of the principles of Agile.

Roger Dooley: Well, I think our audience will relate to that because many of them joined us either via neuro-marketing or via behavioral marketing or by a performance marketing of some kind like conversion optimization. And all of these are focused on using real data, not somebody sitting in a boardroom guessing as to what's going to work. In fact, one of your sort of core principles is testing and data over opinions and conventions. So then conventions are the other thing. Well, that's the way it's done. It's a best practice. We follow best practices, forget that, do a test and see what actually works.

Jim Ewel: Yeah. Because best practice for someone else may not work on your site. Right? One of the common best practices that I see a lot of people using is what's called long form sales letters. Right? But long form sales letters

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work for things that have a high ticket price or complex to sale and that people have a lot of doubts that need to be answered before they do that. But if you've got something that's relatively and expensive, people understand it and they just want to know a few quick things, a long sales form will not convert better, it just won't. Okay. So you got to test, you got to try these things out. I never know, things that I test surprise me all the time. I would have said this one worked better than that, and it's the opposite way around. So you have to test

Roger Dooley: Do you want you to describe a scenario that you might be familiar with, with a company not necessarily a giant brand adopting this throughout, but either a smaller organization or a small part of a bigger organization that shifted from a traditional model. And you can just briefly describe what they did, how that went and what the results were.

Jim Ewel: Yeah. So I worked with the small manufacturing firm in a small town in Wisconsin. Okay. Fort Atkinson, Wisconsin. So it's kind of in between Milwaukee and Madison, Wisconsin. And the name of the company is Spacesaver. Okay. And Spacesaver has custom storage solutions for all kinds of uses. Like you have a bunch of books behind you, well, they have storage solutions for law libraries where, a particular law book may not be accessed very often, but when you need it you need it. They have a way to store a lot more books in a smaller amount of space. And that's important for legal firms because their costs per square foot for their fancy offices is a lot, so more books into smaller spaces is a good value proposition. They also store things like nuclear tipped missiles for

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submarines. Okay. So a big variety in terms of what they do.

Jim Ewel: And they had a really small marketing team. And they just had some layoffs, okay, in the marketing team because the sales were down a little bit when I came in. And so they'd gone from like 14 people that have 10 people I think or something like that. So I came in and one of the very first things that I did actually during the training, this was back in the days when I did onsite training and I came to Fort Atkinson to train them, is that I had them bring one of the sales guys over during lunch. And I asked them to pick the sales guy who was most excited to work with them. Okay. So we brought him over and we asked him, where does marketing do well today? Then we asked him, where can marketing do better? What about the areas for improvement? We asked him, how does he get measured?

Jim Ewel: What are the metrics that really matter to him? Okay. And then we asked him a fourth question. We said, what can marketing do within the next 30 to 90 days to help you make your numbers? Okay. Salespeople love being asked questions like that. Okay. If you say, how can I help you make your numbers? You got their attention, right? To do that. So what ended up happening over the next six months to a year is that the relationship between sales and marketing changed dramatically. It had been a very kind of head budding relationship. And quite frankly, sales never believed marketing's numbers because they were providing them with those vanity metrics. Metrics that made marketing look good, but sales knew this is not helping me sell. Right? So they started doing what I call radical transparency.

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Jim Ewel: And the marketing guys started sharing with them experiments, tests essentially, that didn't work. Some of them worked, some of them didn't, but they shared the test regardless of whether it worked or it didn't. And so the sales guys could see marketing is being honest with me and then they started developing this trust between them. So about six months into this process, there was a meeting with the CEO and head of marketing and the sales guy. And the CEO said something like, "Hey, you guys did that Agile marketing training six months ago and I haven't seen much. Is that worthwhile? We spent a lot of money on that." And the sales guy spoke up and he said, "Absolutely, I'm going to tell you what these guys are doing." And having the sales guy say something like that had much more credibility than anything the marketing guy could've said. Okay. So developing that relationship is one of the most important things to get started with Agile marketing. I call that the alignment piece.

Roger Dooley: Right? Yeah. I think breaking down that wall between marketing and sales, I remember from my own project management days, the advertising people were talking about all the leads they were generating and they were getting counts on that. And the salespeople are saying that, "Well yeah, but these leads are garbage, they're all literature collectors. Whenever we follow up with them they don't even want to talk to us."

Jim Ewel: Right.

Roger Dooley: And then it's, "Well you're not actually following up on those and you're doing it wrong and," literally not saying, "Okay well, maybe these ads aren't producing sales results, what could we do differently?" And getting that

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input from the salespeople and also from marketing. Because obviously marketing people should know something about marketing, but if they better know what's happening out in the real world, know what's going on with the customers that they probably don't have that firsthand feel for unless they've been doing some kind of primary market research, then that transparency is really going to help us. As you say, Jim, building trust is so important in an organization.

Jim Ewel: Yeah.

Roger Dooley: Well I think that in this situation I was describing, a part of the reason for this inner departmental friction was that there was a lack of trust. The marketing people did not trust salespeople to even attempt to follow up on leads where the salespeople just didn't trust the marketers had a clue as to what they were doing. And that they were sending them leads that were worthless and spending a lot of money on stuff that they could have used in some other way that they felt would have been more productive. Anytime you can build trust, that's a winner.

Jim Ewel: Yeah. And the way you get out of that vicious cycle. Okay. Where sales doesn't trust marketing, marketing doesn't trust sales, marketing has to take the first step. So they have to say, "Okay, what would a quality lead look like in your opinion?" Okay, Mr. Salesperson, right? And then you can start having a useful conversation. And then you could say, and by the way, how soon does a lead, not expire, but what's the word, go bad in terms of they choose somebody else because you didn't get back to them fast enough. Okay. And then you can say, okay, are you going to get back to all these leads within 48 hours?

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And anyways, you can start having a good conversation and you can get out of that vicious cycle.

Roger Dooley: Well, Jim, I think your story also highlights another interesting point because so often when you hear about a company that is going to embark on a customer experience improvement effort, the first thing that you will hear from the customer experience experts is, while you've got to have C-level buy-in. CEO has to be behind this because otherwise it's not going to work. And certainly you see that where companies won't make the investment. They'll say, well, we want to improve customer experience, but wow, that's too expensive for this fiscal. Our numbers are kind of shaky right now, we'll push that to next fiscal. And so the next fiscal customer experience is pretty much what it was to begin with. So it's clear that even though there's leap service to improving that, it's not really happening because the key objective of the CEO and perhaps the other C-level executives is to make the quarters numbers, the year's numbers so that they still have their jobs the next time around.

Roger Dooley: But what you were describing was a situation where the CEO was kind of hands-off. It was an initial maybe that got approved by the CEO but from there on there wasn't necessarily a lot of support from that level. They just sort of let it run and the project continued on its own, which to me is kind of an encouraging thing. If the marketing people can find maybe a little bit of money for the training or materials or whatever, to start the ball rolling, then they can do this almost on their own and then try and elicit that cooperation from other departments without having to require the CEO to hammer on the other department

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saying, "Okay, you've got to listen to marketing or else," which for certain kinds of things, unfortunately is the case.

Jim Ewel: When I talk to clients about how to sell Agile into your organization, I say, you first have to identify which scenario you're in. Okay. Are you in a scenario where management is likely to support Agile but they want some proof. Okay. I've yet to see the CEO who'll just give you a blank check. Okay. They just don't do that. Right?

Roger Dooley: You're still looking for that one, Jim, right?

Jim Ewel: Well look, I was the CEO of my last three companies. Okay. Smaller organizations, but I get it. Okay. I think like they do too. I would like some evidence before I'm going to spend this money. Right? So you've got the one situation where they're likely to support it if they have some evidence. Okay. And then you have the other situation where they're not likely to support it. They're basically going to come back and say, well, not this quarter because we're having financial difficulties or whatever. Okay. And by the way, for this one, well maybe the reason you're having financial difficulties is because you're not doing good enough marketing and you're not doing enough things. So I think it'd be an answer for both. So let me give you an example, what somebody did in the first case.

Jim Ewel: So this is Best Buy Canada. And what they decided to do because they had somewhat of a skeptical CEO, is they decided for two weeks to create this, this is another technique in Agile, it's called a cross-functional team. So they took some of the best people from these different teams and they put them together for two weeks, just two

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weeks. Right? Anybody can afford to let somebody do something else for two weeks. I mean, somebody could go on vacation for two weeks, right? So two weeks work on this new business which is really important to the CEO and see what they could do for two weeks. Well, what they did was tremendous. Okay. And so then they kind of have the proof to be able to say, all right, let's take the next step. And they took this cross-functional team and they said, okay, we're going to try this for three months or whatever time period they chose. Okay.

Jim Ewel:

And then once that succeeded, then they formed a second cross-functional team and so forth and now they have multiple cross-functional teams. So again, implement Agile in an agile way. Start small, get some data and prove this out, and then gradually increase it as it works. Okay. And that will convince those people who they need evidence to do it. Now how do you convince these other guys? The ones who say, no. No, thank you. Okay. So here's what you do. Number one, you don't tell them you're doing Agile marketing. Okay. You just don't tell them. You just say, we're going to try some different things. Okay. I mean, you've got an existing budget, right? So don't call it Agile, don't refer to Scrum, don't refer to Kanban, any of that sort of stuff. Just say, yeah we're tracking our stuff in a little different way here, it is visually, don't even tell them what it's called.

Jim Ewel:

Or we're starting to do things and trying to schedule our work a week or two in advance. Don't call it Scrum. Okay. Just describe what you're doing. Then once you've had some successes, promote those successes. Try to make sure that people are aware of them. And particularly try to get the other business departments that you worked with

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to promote you, instead of tooting your own horn, get them to promote you. And then somebody starts saying, "Well, how did you guys do that?" Oh, we did it using this new technique called Agile. Right? And then you can start getting the training and other things and you start getting the budget for that. So that's the way I recommend that people-

Roger Dooley: I like that approach of a very short term effort, but Jim, what kind of things can you actually accomplish in a couple of weeks? Let's say, maybe you're not going to revitalize the entire organization, but-

Jim Ewel: Oh, you're not.

Roger Dooley: ... what can you do that would even show some evidence that, okay, hey, this really works.

Jim Ewel: Well. In this case, it was a new business. Right? And so essentially what they did is they kind of did a proof of concept that this business was less risky than they previously thought. That there was more opportunity there than you thought. So one of the things that I say, CEOs are in the business of managing risk, that's just part of how they think. Okay. So if you can do something that shows that a particular idea is either less risky or there's more opportunity there than previously thought, okay. I mean, you're not going to turn around the business results, but you could very well start proving out some of the assumptions that are part of the business and start saying, oh, okay, this assumption, that's wrong, but this assumption was right and so now we know that this business is a little less risky than two weeks ago. That kind of thing.

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Jim Ewel: So you have to figure, every business is different. So I can't tell you a generic way, but that's the way to think about it. Okay. Think about things that reduce risk, then look at the assumptions that are being made and question those assumptions and prove them either wrong or right and then you'll have something to go to senior management with.

Roger Dooley: Almost sort of a marketing hackathon, if you will. Where you get a small team together that focuses completely on one thing and works really hard on it and hopefully it comes up with some kind of a proof of concept, if not an actual solution. Well, Jim, how can people find you and your ideas online?

Jim Ewel: Well, the easiest way is just to look at my website. It's called agilemarketing.net, okay? And that's the easiest place to find me. You can also find me at, @jimewel on Twitter.

Roger Dooley: Great. Well, we will link to those places and any other resources we spoke about. On the show notes page @rogerdooley.com/podcast, where we will also have audio, text and video versions of this conversation. Jim, thanks for being on the show.

Jim Ewel: Thank you, Roger. It's a pleasure.

Thank you for tuning into this episode of Brainfluence. To find more episodes like this one, and to access all of Roger's online writing and resources, the best starting point is RogerDooley.com.

And remember, Roger's new book, *Friction*, is now available at Amazon, Barnes and Noble, and book sellers everywhere. Bestselling author Dan

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Pink calls it, "An important read," and Wharton Professor Dr. Joana Berger said, "You'll understand Friction's power and how to harness it."

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