

Infusionsoft:

Supporting Small Business Growth

Infusionsoft was founded in 2001 to revolutionize small business growth through automated sales and marketing. The company offers a CRM system designed specifically for small businesses that combines a customer database, email marketing and e-commerce. The Chandler, AZ, company has expanded dramatically since its inception; it averages one new hire a day and serves more than 100,000 customers worldwide.



CHALLENGE

Roles and responsibilities were unclear for Infusionsoft's product management team, and there was confusion around product marketing: Where did it sit? What did it do? There were no tools and metrics in place to effectively support that team.

In addition, Infusionsoft's customer base was expanding. The original customers—savvy information marketers who were well-versed in advanced marketing techniques—were joined by smaller, more practical business owners who were experts in their trade, but not necessarily in marketing. And while the software's complexity didn't pose an obstacle for its original users, the learning curve was more challenging for these newer, less technical users.

SOLUTION

The vision of Infusionsoft's CTO Marc Chesley had for Infusionsoft was to create organizational clarity by establishing standardized frameworks. As he states, "Frameworks give people something to rally around and unite teams."



Marc Chesley
CTO Infusionsoft

Agile was the first framework implemented. Everyone—including the product team—became scrum certified, which brought order and accountability to the development team. Chesley searched for something similar for the product management team but was unsuccessful until he discovered Pragmatic Marketing. The Pragmatic Marketing Framework—with its focus on understanding the problems to be solved—resonated with him. Two director-level employees attended training and returned confident that the Pragmatic Marketing Framework would work at Infusionsoft.

Chesley then took a "leap of faith" and invested in sending all of his product managers, product marketers and developers—approximately 40 people—to training. Next, all C-suite leaders, including the CEO, committed to attend the second round. Leadership buy-in was invaluable in implementing the framework

because that enthusiasm rolled down through the ranks. “Now we’re all pragmatic marketers; all the leaders, including our CEO,” Chesley said.

Pragmatic Marketing training helped Infusionsoft implement the structure Chesley sought. In adopting the Pragmatic Framework, Infusionsoft could clearly identify which boxes product management owns and which ones product marketing owns. In addition, the head of product now performs quarterly maturity model assessments of the 37 framework boxes. These measure Infusionsoft’s strengths in each box and identify which two or three boxes they should focus on each quarter.

“Solving problems people are willing to pay for is how we became successful.”

Marc Chesley
CTO, Infusionsoft

Infusionsoft also implemented market visits (dubbed NIHITO visits internally) for product managers. The product managers then grade each other on their NIHITO reports, ensuring a higher level of accountability and shared market knowledge. Product managers also write short business cases for each new feature, ensuring the right prioritization of company and development resources.

Having a tried and true framework to maintain consistency has been a huge confidence booster for Infusionsoft, Chesley said, and executive confidence in product management and development is at an all-time high.

RESULTS

Culture is key at Infusionsoft. “There’s a reason ‘cult’ is part of ‘culture’: To be truly successful, you have to give people a vision to rally around and a company they can be passionate about,” Chesley noted. “We didn’t have the full picture until we found Pragmatic Marketing.”

Training clarified roles and responsibilities, creating crisp lines of delineation and clear boundaries. Product management is no longer involved in solution design; now they provide more context around individual problems to help designers and engineers create better solutions. But the biggest change was creating a common language and framework to maintain consistency.

In addition, Infusionsoft has pulled back from focusing on data-driven releases to focus on customer needs. The company previously generated four releases a year (two major and two minor). Now it generates a launch each month, greatly improving its ability to deliver value to the market.

“Solving problems people are willing to pay for is how we became successful,” Chesley said. “Pragmatic Marketing helps ensure we don’t lose sight of that.”



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