

# Marketing Operations On-Demand Webinar

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## Video Transcription

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GROUP

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## Intro & Agenda (0:24)

Hello, everyone and welcome to today's webinar on increasing the efficiency and effectiveness of marketing, the rise of marketing operations. My name is Jeff Pedowitz, President and CEO of Pedowitz Group. And today, the growing complexity of prospects, engaging with them and customers in a digital world is really creating challenges for all types of marketing practitioners who are struggling with hiring, training, resourcing the right people, developing and optimizing the right processes, selecting, investing and driving adoption of appropriate marketing technology. Marketers everywhere, and not only in B2B but in B2C, are under increasing pressure to provide a more transparent, efficient and accountable view of marketing performance. In the last few years, the marketing operations function has started to emerge as a result. In today's webinar, we're going to explore the rise of marketing operations, as well as some responsibilities, capabilities and skills needed. And we're going to also let you assess your current level of maturity.

## Landscape (1:45)

So first, we'll start off by examining the current marketing landscape, which is changing all the time, so current, I guess, being the operative word. Next, we're going to introduce the concept of marketing operations. Third, we're going to review the marketing operations maturity model. And then we'll give you an opportunity to assess your own marketing operations maturity score. And, finally, we'll talk about the next steps of what you can do, once you understand where your current score is, within the maturity model.

So let's start by examining the current marketing landscape. This should probably be no surprise to many of you but market technology has just simply exploded. You know, when I started my career, it was before email. And we sent out catalogues and direct mail. And then in the '90s, we probably only really had to contend with maybe some email and a little bit of search marketing. But over the last 15 years, technology has just simply exploded.

If you follow Scott Brinker, MarTech or the LUMAcade, they're all tracking this just incredible proliferation of marketing technology. If we look back to just August of 2011, there was approximately 150 marketing technology solutions in a handful of categories. Earlier this year, it's now almost at 3,900. And, I suppose by the time this comes out again in the spring of 2017, you're going to see it approaching probably about 5,000 different technologies in over 50 different categories. So this really represents a 20X increase in the last past five years alone, a compounded annual growth rate of over 92%. So that's just tremendous. So, of course, no one on Earth could possibly begin to even use 100 technology solutions, let alone 4,000, but, yet, they're coming out all the time, solving all different kinds of problems across the marketing landscape. And we, as marketers, have to learn what to do with it.

## Marketing Process exploding in growth (3:21)

Second, with the rise of technology and digital engagement, customer engagement, multiple channels, marketing processes have just exploded in growth. And that is leading to a tremendous amount of change, complexity and uncertainty in today's enterprise. Resources that were already strained before are even more strained now. And productivity actually is suffering, as a result. So too much work to do, too few hours in a day, too few bodies to actually do the work, not having the right mix of skills, not having the right budget, it's all creating a perfect storm.

## Required Marketing Skills have grown 300% (3:57)

Also, the required marketing skills of today's marketer have grown well over 300%, spanning multiple channels, processes and technologies. In 1990 or early in the '90s, you know, if you just knew the five P's, along with a handful of channels, direct mail, advertising, budgeting and planning, event management, that was pretty much it in terms of marketing. There was no responsibility for demand generation. The concept of Omni-Channel really did not exist. And then as we started moving into the 2000's adding in email marketing, search paved the early aspects of digital advertising. And then in 2005, added components such as social, SEO, Pay-Per-Click, lead management, especially for B2B marketers in blogging.

In 2010, buyer journey personas, campaign management, content marketing, data management, analytics, business intelligence, and along with managing live event marketing technology that we mentioned in an earlier slide. And then fast forward to this year. And you can see it, it doesn't even exist on the chart anymore. It's just exploding. So what's happened, even in the last couple years, now marketing is getting into working with sales, working on pipeline management, workflow, especially across global different divisions. It's being asked to get more involved in financial management, vendor management. Now that all these marketing technology vendors are reporting into marketing, marketing need to have skills there. Full customer lifecycle, not just acquisition at the top of the funnel but full cycle engagement. True Omni-Channel. Change management. Today's marketers are being asked to be managing change across the enterprise, managing projects. They are being asked to do predictive modeling when they're even struggling with getting the base analytics of what they have now. And, and it goes on and on. So, you know, by another couple years, I won't even be able to fit all the skills that a marketer needs to do on one chart. So, of course, any one person cannot do all these things. And that's why it really is incumbent upon today's CMOs to find the right balance, build the right team, department, build the skills, both insourcing as well as outsourcing.

## The need for new skills and capabilities increases (6:10)

So the need for new skills and capabilities does continue to increase. And these are probably some of the more prevalent ones. So, of all the skills that I just shared on the previous slide, these are the ones that are really driving today's successful modern marketers. So really being able to understand how to examine data and co-analytics and, even more importantly, provide insights for the stakeholders of the business. Data management and governance. Managing data is an issue for just about every marketer I know. And the problem has not gone away, it's actually proliferated. As we now get into the Internet of Things, multiple devices, multiple channels, data is everywhere. So in addition to that, really good strong project management because now marketers are managing all different kinds of projects across the enterprise. And, as I mentioned earlier, change management.

Campaign analysis and reporting, on top of whatever marketing platform you happen to be using. Budgeting and planning but not just the traditional top-down budgeting and planning, more of beyond budgeting, agile marketing concepts where marketers are now asking to hypothesize tasks, budget in small increments, proof things out, budget by the campaign, budget by the program, not just budget by the year. More important is to understand how to do financial governance and reporting. Marketing executives are now being held accountable at the board level for performance results are aligned. So as a caveat or as an outcome of that, then their teams need to be able to start understanding, not only how to measure traditional responses but they also have to understand what contribution marketing is making to the business, what kind of performance and ROI it's driving.

So as all these standards are rising and there are advisory firms, whether it's Sirius Decisions, Forrester, or Gartner, lots of technology and vendors and, of course, lots of practitioners, there is more data and benchmarks available now than ever before. So today's marketer also needs to understand how to be objective, how to look at these third-party benchmarking standards, tools, and see how their processes, matrix performance criteria, are performing in relation to those benchmark standards. So it's a constant process of assessing where you are, what the market's doing, what your competitors are doing, and what you're going to be able to do differently going forward to improve your capabilities in a given area. And then, it goes without saying, but being able to manage this marketing technology but, first, having a rationalization for what you're going to select, how you're going to use it, how it fits into your architecture. You know, you essentially need to be a marketing technologist or have a marketing technologist that's reporting into the CMO that can make these strategic decisions but then you have to have to manage and operate it and as part of a cohesive architecture and infrastructure to support your marketing goals and objectives. So there's a lot going on in today's marketing landscape.

## Definition of Marketing Operations (9:04)

So let's talk a little bit then about marketing operations. So, first, what would be a good definition because you probably might have heard several different ones. But the way that we would define it is, marketing operations is an organizational approach to creating demand for products and services. It focuses on end-to-end marketing optimization, from planning and budgeting to global execution and analysis, using tools, databases, automation, and best practices.

## Marketing's role (9:43)

So thank you to a colleague over at Marketing Iteration for putting this together, looking at marketing's role in the current organization. So there are a number of critical touch points. And this is more of a high-level abstract of what your organization might look like but just about every company, of course, has sales. There is some type of engagement of field marketing, working at the field level with sales or engaging with the customer.

There is always some degree of product marketing, product management. And then you have product engineering, R&D. And then you have the technology that drives it. And so, corporate marketing kind of cuts through all these different things where it's dividing overall different strategy, product packaging, positioning, competitive analysis. It really acts as a horizontal services layer that's intersecting with every organization across the company, developing consistency and visual and written language and centers of excellence. The marketing ops team though, as you can see, also kind of cuts across horizontally these different functions. And it has a slightly different focus, which is to provide consistent data connecting prospects to users from field marketing to product and technology. So it's interfacing with all of these key components all the way through.

## Marketing Operations Overall structure (11:00)

So, as we look at the overall structure of the marketing organization, it may or may look something like this where you have a creative department that owns brands, design, brand writing and it really supports those functions. And then it could be supporting website email copy, for example, or potentially physical collateral, for those of you who are still doing that. Most of that's gone away. The marketing operations kind of fits in here. You got some common ownership around reporting, work flow, analytic testing, data, processes. And this may be some of the roles so we're going to talk a little bit more about some expanded roles that you might find in marketing operations but project management, data, administration of marketing applications is definitely a core thing, CRM.

And then it could be engaging in funnel management reporting, ad hoc analysis, website development. And then these are some of the other typical groupings that many CMOs start to organize their teams around. So you might have a content and communications group, product marketing and field marketing/demand gen. Sometimes we see marketing operations kind of reporting into demand gen. Sometimes demand gen has components of marketing operations and many times they're separate. There's really no right or wrong way in how you would organize your particular marketing organization but just know that these are all discrete functions that need to be managed.

So when we look at what derives marketing operations excellence within a structure, it really is responsible for driving close alignment with sales and the technology. It does leverage a lot of processes, whether it's Scrum or Agile or others that IT would use in terms of managing today's modern marketing organization. And it really relies heavily on data analytics to develop and deliver insights to the key stakeholders around the company.

## Critical roles in Marketing Operations (12:54)

So, some of the critical roles here within marketing ops, and these others are optional, but you will always find this within marketing ops. You know, if marketing ops is not doing analytics data and insight and not managing marketing technology, something is askew because really it's these two that are at the heart and soul of today's organization. It's the technology, the influx of the technology, that's driving a lot of new processes, that's creating a lot of the data, that's creating a lot of the channels for this department to scale. So you have to be able to operationalize that and manage it. So that's critically important.

## Marketing Operations Responsibilities (13:33)

So as we look at typical marketing operations responsibilities, this is a big eye chart, but marketing operations can potentially cover all of these areas. Now to what degree you assign these tasks within your marketing operations department is up to you, but with our research and working with clients, we do see a lot of these functions. So, again, looking at managing technology and data, and analytics, this is that marketing technologist's role that I was talking. So not only is there the strategic selection, but you also have to manage the integration, optimization. You know, this could be a scenario where you're partnering with your IT organization and they could be fulfilling some of these things, but many times marketing can own the technology straight-out and has to be able to make these decisions. It also involves strategic road-mapping, managing the infrastructure, which is predominately now cloud-based, overall administration and vendor management. In the data optimization and governance area, it's the overall data strategy of what you're trying to do, which customers you're going after. If you're doing account-based marketing, what kind of data do you need? You may need a governance in plan, place in plan, a governance plan in place. You need to work on ongoing cleanliness, enrichment, depending.

And once you finally get your data to a reasonable point and your processes are mature, you start getting into being able to leverage third-party business intelligence tools, predictive modeling and just overall data management. From a measurement and analytics, it's not just measuring campaign response, right? So that's kind of table stakes, web traffic, leads, impressions, PR yield and what you've spent on your budget. This is more about operational and financial metrics, so efficiency and effectiveness, return on investment, revenue contribution, multi-touch attribution, profit, market share, margin. These are many things that marketing ops will start to measure in a more mature organization. It can take ownership over management of the funnel, working with sales or with sales op, really developing and getting key customer insights and, again, providing those insights to the stakeholders.

There are blocks of emerging processes in today's modern marketing environment but these are some of the typical ones that you would find marketing operations managing, so the whole process of campaign operations. Now, this is not the creative or the strategy of the campaign, it's managing the workflow of the campaign from beginning to end. It is providing a ticketing system. So particularly, if you're working with multiple marketing requesters, multiple agencies, brand owners, marketing ops can be kind of that centralized function that manages the production of the campaign. So it really streamlines resource usage, maximizes approval, maximizes resources. But there are processes, of course, with management and lifecycle of a lead. It is critically important, lead conversion, the full customer buyer journey, content operations, so your strategy, curating, distributing, syndicating, optimizing, measuring content. And then more and more, we're starting to see marketing ops get involved with opportunity management as well, because marketing is so intertwined.

On the product management side, particularly with the bigger companies, we're finding marketing now or the marketing ops group, in particular, is centralizing project management tasks whenever there are these medium to large enterprise initiatives or marketing initiatives and marketing operations has mature workflow processes or regimented approach. So they're typically called on for their project management expertise. They manage the budget. They manage financial compliance. They also take ownership for training with all the new best practices and technology. You know, just even if you have an MBA, it's not enough. You need an MBA basically about every three months now in today's modern marketing environment. So marketing operations, they gather all the content best practices from different sites, they go to the conferences, they work with the vendors. They are managing kind of a living, breathing library of best practices and they're providing on-going training for their constituents around the world.

And then change management now, as well as customer insight, is becoming a very important role with all this churn, with all this impact, between technology process, skills, etc. this really affects every company, small, medium, and large. And so, marketing operations works with key stakeholders to drive the change and to help workers ensure that their companies can be as innovative and as nimble as possible.

## Why Centralize Marketing Operations (18:28)

So there's probably some aspect of marketing operations in many, many companies. I mean, you might not be formally calling it marketing ops but you probably do have at least some of your resources doing some of these things. You might be familiar with the term "center of excellence" or "centralization of marketing." Well, there is really an important I guess outcome to be based or a lesson to be based in terms of centralizing marketing operations.

First of all, data itself, along with technology and processes, they are becoming so critical. They're so essential to marketing efficiency, effectiveness and agility that it does require marketing operations to be centralized to manage, if you are trying to get toward your desired results of revenue growth, attribution, complete leads, etc.

Second, many, many marketing organizations have inefficient budgeting processes, especially world-wide. When they're broken out across divisions, product lines, fields, groups, each of those groups will end up probably spending similar funds on agencies or content or PR or events when, if it was centrally managed, you can often, typically, free up about 10 to 15% of your macro gross budget. So the consolidation of people, process, technology and the budget does actually help you to increase your marketing in efficiency and organizational agility world-wide.

And third, marketing is not asked but required, really, to adapt from being product-centric to customer-centric. And you would think that we were always customer-centric and we talk about the customer but we, we really haven't been. Up until very recently, as marketers, we, typically, have taken a product-first or a company-first approach. But, as we're really being mandated to move towards customer-centric approach, changes in buying behavior over the internet and the customer being in more control, we have to do it that way. But that change creates a heightened dependence on customer data and then all the related processes and technologies that go with those processes change. So having a centralized and optimized function also helps the company to improve revenue, margin, profit and market share. Why? It's more strategic. You know, first of all, you're spending company resources much more intelligently, much more deliberately, much more strategically. And then you are engaging with key stakeholders around the company to apply the right marketing at the right time.

The centralization of marketing operations also helps change how marketing is typically viewed. In many, many companies, marketing is viewed as a cost center. And so when you really start to implement marketing operations, it helps change you from being a cost center to being a business center, a revenue center, a performance driver, with formalized best practices, processes, infrastructure and reporting. And finally, marketing can centralize and manage a single view of customer data, which is really critically important. I mean, data is everywhere around the enterprise. And so when the data is in siloes and in pieces and the systems aren't connected, it is really difficult to understand. So you want to be customer-centric, but it is very difficult to do without having our data centralized. So centralized marketing operations can also help centralize that data and make it available to all marketing functions. And then it leverages that unified view to make market, customer and product/service decisions that will create value for its customers and its shareholders.

## Marketing Operations Evolution and potential impact on organizations (22:00)

So, as marketing operations continues to evolve, the definitions of scope expand. I mean, you go back 10 years ago. I don't even think the term marketing operations really existed. Frankly, before 2004, lead management, lead scoring didn't exist. So there's a lot of terms that we use today, that we take for granted as gospel that, if you roll back the clock a decade or so, were not here. So every year as processes, technology, data, continues to grow, the role of marketing operations definitely continues to evolve. So as we studied a number of firms that have been putting marketing operations in place in one way, shape or another, they are definitely able to do a few things when they centralize. First of all, they're definitely able to optimize their budgets. And as I mentioned earlier, at a minimum, we've seen 5% budget optimization but, in many cases, we can see 10%, 15% and sometimes 20%. Process improvement, documentation, iteration, training, you get optimization and stronger adoption of marketing technology.

You, also, are able to really hone in on your people because once you start to centralize the team, whether it's one person, two, 20, you're going to be able to really develop that specialization and increase your skill focus. And with marketing operations, the scope continues to progress over time. It will continue to, not only become more sophisticated, but it will also drive more value, not only for marketing but for the company, as a whole. And then like anything in life, right, I mean, every company is different. They're going to be at different levels in maturity. They might be more advanced in some aspects of marketing operations than others. And the important thing is to know where you are, what your business goals and objectives are and then where you should be applying yourself to kind of move next. So what's going to get the best incremental business return on investment with really minimum to moderate risk and minimum to moderate levels of investment?

## Marketing Operations Maturity Model (24:00)

So now let's talk about the marketing operations maturity model. So first of all, why do you even need a maturity model? Well, I suppose you don't need one. I mean, you know, if you...Most of you probably do just fine without having a model, but when you do use a maturity model, it does allow you, as a company, to have your methods and processes assessed, according to third-party best practices, external benchmarks. So, again, whether you're using SiriusDecisions or Forrester or Gartner, IDC and Aberdeen, all these have done a lot of market research. And when you use processes, standards, metrics, components that have been vetted out of research, it really allows you to truly and objectively compare your marketing's performance against that third-party standard. And so, also, assessing your current strategy, your personnel, your work processes, your marketing technology, what your customer orientation is in lifecycle marketing and the results that you achieve, does lead to a number of different benefits.

First of all, you'll know where you are, whether you're at early, middle, late maturity level, you are where you are. And there is always things that you can do at each part of that maturity curve so that you can get that incremental return on investments. So it kind of serves as a road map for you. You'll be able to see what your competitors are doing or what other companies are doing, or, frankly, you can just...comparing yourself to other divisions or departments within your own company, especially for those of you that work at bigger companies. Third, you know, it really is...In self-assessing and kind of doing self-tools, it's good to a degree, but it's also subjective because, depending upon who's doing the self-assessment, they're constantly changing the questions. They're informative, for sure, but when you use third-party maturity models, the questions are consistent. They've been validated. They've been asked of thousands of respondents. So they're going to be a lot more consistent and accurate in the data and information it can provide to you. And, finally, just knowing that, hey, the third-party benchmark, the standard for this, is this percentage or this number or this value, knowing where you rank against that is very helpful.

## Introducing the Marketing Operations Maturity Model (26:17)

So in any maturity model, but, also, of course, in marketing operations maturity model, your company would move through different stages of maturity to reach and optimize various elements that go in it. So we talked about those different roles. So, depending upon what you're working on, you might be working on maturing your lead management processes or it may be you're working on maturing your data or your analytics or maybe you're working on maturing how you select, manage and adopt marketing technology. You could be working on all those things at the same time or you could have prioritized initiatives on what you're doing with those. So, depending upon where your maturity is, depending upon what your priorities and your business goals are, the scope of your marketing operations effort could look radically different. So you could still have the same benchmarks as your competitor, you could still have the same comparisons but your priorities and how you're approaching it within your own company can vary quite significantly. But in any marketing operations group, I mean, if you're making this a high priority, it's really important at a minimum, even if you're only working on one thing, that it's really all about metrics and data. It's not about intuition, hunches. It's really about using data to drive analysis and get to proven performance and results.



Having a plan in place, you know, like anything. First, again, a plan and don't just jump in. Figure out what you're trying to achieve and then try to execution. And then, you know, marketing today, more than ever before, is a cross-company collaborator. So, you know, if you can develop cross-functional goals and tie marketing ops into critical goals that your company is trying to achieve, that's the surest way, even if you're only working on a small piece of marketing operations, where you can show success.

## Marketing Operations Maturity model - 4 Stages (28:03)

So this is the marketing operations and maturity model. And it has four stages. So, as I shared earlier, there's certain capabilities that you're trying to master, over a period of time, data, processes, people, service-strategic elements, customer orientation, measurement, etc. And then the goal of the department is to improve the efficiency and effectiveness of marketing, however you might be measuring that. So there's a lot of different ways that you could be measuring that.

So there are four phases. So there's ad hoc, there's formal and it's a decentralized function. There's formal centralized and then marketing operations are strategic. And so we would actually formally call these four phases, so ad hoc is traditional marketing. Formal but de-centralized marketing ops is lead gen. Formal centralized is demand gen. And, finally, strategic is revenue marketing. These are the scores. And so we're going to get into in a couple minutes how you would score yourself to figure out but you would rate yourself on a scale. And then if you scored between zero and six you would be here, seven or twelve and so on. So, again, none of this means that you are or are not successful. You could be an ad hoc or not have any marketing operations at all and you guys could be growing compounded 20, 30% per year and making quite a lot of profit or, you know, you could be further along and maybe not getting as many of those metrics as you wanted. But, generally speaking, as you start to put these things in, there is a high degree of correlation between performance, consistency and benchmark marketing performance in the company with your rate of maturity.

## Marketing Operations Maturity model - Detail (29:45)

So this is the model in a little bit more detail. And this is a bit of an eye chart so we're not going to get through all this today. But, essentially, there are six elements, right? So there is your overall approach to strategy, there is your personnel, the skills that you have, how you're structured organizationally. There are the processes that you use, whether they're defined, developed, documented, automated or optimized. How well you select and adopt marketing technology to scale the business, what your customer orientation is, you know, and how well you leverage content and customer life cycle techniques, buyer journey personas and so on. And then, finally, what kind of performance that you're getting. So, quickly, let's kind of compare, if you are a traditional marketing organization and marketing ops, what would that look like? So your strategy as it relates to marketing operations, it's, you're not really planning for marketing ops, you're kind of reacting to business events as they arise. So you, you don't go into the year, you don't have really any budget allocation or line item and there really is no sales and marketing alignment.

Your personnel, I mean, of course, you have people, but you're not really structuring... There's no structure in place for marketing operations. You might have some alignment between the people that are reporting into you but you're staffing reactively. So when something of a marketing operations nature arises, you just deal with it at the time, essentially. From a profits perspective, there really is no formal process, you're kind of hiring some good people, you're trusting them to do their job. And, and that's how you're kind of scaling right now. Content is typically created as you need it with silos or you're hiring third-party agencies to do it. And there are no formal lead processes in place. Your technology, if you have it, is siloed. And there really is no defined architecture. So, as it relates to working with your customer, knowledge is generally a gut feeling and insight is gained from talking to sales. And from what you measure, there are no marketing operations, key performance indicators, in place. There is no formal budget for marketing operations. So that kind of gives you an idea of what traditional would look like.

Moving over to, into revenue marketing, so let's just kind of compare the beginning to the end. So if you're a world-class marketing operations department, from a strategic perspective, marketing operations would be constantly driving and delivering key insights for strategic decision-making to the CMO and to other executives around the company and they have fully optimized the sales and marketing working relationship. Your personnel, your structure, is just fully optimized. There's an ongoing capability there. There's a formalized function. Marketing ops is reporting into one of the VPs of marketing or even the CMO. It is responsible for buying company strategic insights and has alignment across all the major functions within the company. From a process perspective, all your processes, lead management, campaign management, account-based marketing, all those things, they're fully optimized for continuous improvement.

There's also a very strong and optimized content operations department. Your marketing technology is fully integrated and optimized and you have a coherent, both current and a future state, architecture in place. Marketing ops develops and delivers predictive insights and can accelerate investments, where needed, based upon establishing business cases because they have a lot of credibility. From a customer perspective, we talked a little bit earlier about the centralization of this data, so now marketing operations leverages that data to be a central source of truth about the customer. And then from a measurement perspective, marketing key performance indicators are tied to insights used to make business decisions. And so, then, of course, the rest of these kind of fall in a spectrum in between.

So you could have, for example, your strategy could be here, maybe your people here, some technologies here. A customer could be over here. And that's okay. It's really understanding where you are, both at individual levels and then in the aggregate.

## Using the Marketing Operations Maturity Model (33:48)

So there are a couple of key factors that relate to successfully using the marketing operations maturity model. The first is really having clarity and consistency with how, whatever you're going to do, apply it. Make sure everyone understands what the objectives are, as clearly communicated, and that you do the same things. There would have to be executive support for this otherwise, it will not work. Really being committed to managing processes, so kind of that whole BPR approach. Committing yourself to performance measurement and holding yourself and your marketing team accountable for performance is very critical to the success.

So what are some of the typical obstacles? It's not just for marketing ops, you probably see this for any initiative that you have within your business that you're trying to get in place. And if you have kind of an unsupportive culture that's somewhat resistant to change, struggles with innovations, struggles with adopting technology for competitive advantage you're going to have a challenge putting in marketing operations, there's no two ways to say it. I'm not saying that you can't do it but you're really going to have to commit to change. Not following through, really not having an executive champion that's driving, following up on this every day, every week, that's going to be a problem. You know, being penalized for taking risks, making people feel awful for kind of sticking their neck out, that's not going to be a supportive culture. And, you know, trying to do too much, either for yourself or putting too much on one of your key employees, those are all things that are going to kind of get in the way.

Marketing ops is really as much about transparency and accountability as anything else. So if you wanted to be successful, that's critical. Wherever you are in your journey, you know, you really just want to have clear goals. You want to consistently review it with your team. You want to be able to interact with sales, with product marketing, with IT, with finance, with the executive suite. That's really important. And then, again, keep asking yourself, "Okay. What is this team doing? What are the goals to make marketing more efficient, more effective, more accountable?" And, without a doubt, look, even if you don't have a plan in place, just write it down on a cocktail napkin, if you have to and share it in your weekly meetings, but just keep measuring. You know, get a culture of measurement. Make sure that everybody on your team knows that you can't manage what you don't measure. So you want to write all these things down. You want to keep measuring it. Don't worry about the fancy systems. First, get the critical things down, do the basics and then you can kinda move on to the more advanced things.

## Key Findings in Marketing Operations Maturity Model (36:21)

So, if you don't have reviews, if you don't constantly check progress and check yourself against where you thought you should be and what's going on in the market, you're going to have a harder time getting to a higher state of maturity, once you get out of the first two or those first four phases. You know, there are definitely some aspects to what size company you are. So, you know, if you're a large company, you're going to probably go about this by... You're going to declare a formal marketing operation team, you're going to have a VP, a Director, a manager, or something, in charge of marketing operations. And you're going to focus in on developing and optimizing processes cross-functionally. You're going to work a lot on technology, automation and processes, measurement, and change management. If you're in a bit more of a mid-size company, you may or may not have a formal marketing operations department. You might not be big enough. I mean, you might not be able to swing it with budgeting or resources. So you're typically going to focus a little bit more on trying to get it done through optimizing resources and processes with a particular focus around lead generation and process or governance compliance.

And then, if you're a smaller company, you're really not so much focused at all on building marketing operations and sophistication but you're going to try and pick a couple of priorities that you're going to be able to do with limited resources. And those will, typically involve having a clean and simple lead management process, a clean and simple content operations, a clean and simple program and campaign process to get started. You know, good financial performance is typically seen at more mature firms that have... more mature firms that have a more mature marketing operations role. And the more scope that marketing operations has, the more advanced it is, the more financial controls and better performance you will see in marketing, typically. But, as I mentioned earlier, you could be, you know, more mature in some of these things, but you might not be effective in some of the areas. And if you're not being effective, you have to look at how you're applying some of the things that you're doing. And that's why it's important to have those reviews and keep benchmarking yourself against third-party data.

## Impact of marketing stature charter on Marketing Operations Effectiveness (38:34)

So, how marketing or sales organizations that work together really do relate to marketing's ability to operate strategically, share knowledge and leverage processes. And marketing's kind of a unique position within any company. They're engaging with the channel, they're engaging with field sales, they're engaging with IT, with the customer. They have a lot of data points and touch points. And so they're in a really good position, if they apply themselves properly, to align cross-functionally and strategically drive a lot of key progress at many companies. So having stakeholders aligned, sharing knowledge, being held accountable, will deliver a good balance between strategy and tactics. I mean, I've been dealing with this now for about 12 years. And there is always this running thing about the length or the tenure of the CMO and it, typically, hovers between 20 and 27 months, so overall, not that long. But I could definitely tell you that the length of a CMO tenure will be able to, will definitely relate to the ability to establish and implement marketing operations successfully. And, then, really just depending upon how complex your organization is, you know, the more products, the more channels that you engage in, marketing operations can add a tremendous amount of value with process optimization, data analysis, technology and management.

So, depending upon how formal the marketing operations function is, again, will determine how effective marketing is and then, overall, how much that contributes to, again, the company's success. Again, we talked about centralization earlier. That will, also, really help to ensure that you've got good performance and a good balance between corporate control and then local, you know, when you're delegating it out in the field. And then, finally, you know, when we talk about the scope of marketing operations relying on or relating to marketing self-reliance, in other words, so marketing is now managing technology. Marketing is managing data. Marketing is managing processes. Marketing is engaging with sales to manage the funnel. Marketing is product management. Marketing is doing strategic, it's working with the analysts. So, if marketing can put in a successful marketing operations function and begin to master these different elements and have a strong team, the scope increases significantly. Marketing becomes really highly credible within the enterprise and is turned to for more and more, to lead more initiatives.

## What is your Marketing Operations Maturity Score (41:00)

So, as a follow-up after this, I'm going to... You'll have an opportunity to take this again, but, you know, real quick, if you go through to find out what your current level of maturity is, just kind of go through and we'll get you to these statements. And give yourself a one, if you are in traditional. Give yourself a two, if the answer is in lead gen, a three, if you are in demand generation, and, finally, four, in revenue marketing. So, you know, if you kind of scan through and these statements seem to make sense to you, you would give yourself one point each and you would end up with six points. And, again, two for each one here, three for each one here, and, finally, four for each one here. So I'm just going to pause for a minute. Again, you'll have another opportunity after this. I realize this is probably a little crowded on the screen, but you'll be able to see this a little bit easier on the website. But if you just want to take it now and don't feel obligated or anything, I'm going to give you a second to kind of self-score or take a screenshot... and right now, go for it.

## Introducing The Pedowitz Group (42:17)

Okay. So real quick, about The Pedowitz Group. So we've been at this for 10 years now. And we deliver applied marketing operations services and optimized marketing technology as part of marketing's transformation from a cost center to a revenue center. We help companies with projects, with advisory services, staff augmentation, selecting and supporting marketing technology, helping out with Omni-Channel campaign fulfillment. And also, know we're just very results-focused. So, over the last 10 years, we've worked with over 1,400 global customers. We have proven methodology, many, many winners between Salesforce, Alcon, Marketo and others. And so, again, just a little bit about us.

## What to do next (43:04)

So what to do next? Well, if you don't want to go any further, no problem. Grab that screenshot and you'll at least know, at a minimum, what your maturity is. However, if you want to take a deeper dive, then spend 90 minutes with me. This will be no charge. And I will look at your score and I'll be able to give you some specific recommendations on how to evolve and improve your marketing operations capabilities. I'll be able to share with you what skills you should be hiring for next. We'll talk a little bit about budget prioritizations and what you should be thinking about, as you go into either the next fiscal quarter or fiscal year.

We'll talk about your organizational structure and I'll give a couple of quick organizational recommendations. And then, finally, talk about some of the things that you should be measuring, if you're not measuring them today. So, definitely a jam-packed 90 minutes that we would love to spend some time speaking with you. So here's my link down here. You would go to [revmarketer.pedowitzgroup.com/mo-followup-with-jeff.html](http://revmarketer.pedowitzgroup.com/mo-followup-with-jeff.html). And, again, it's no charge at all.

## Thank You (44:25)

So hope you were able to learn a lot today about marketing operations, it's importance. We did come up against a time limit. So, I was hoping to be able to answer a few questions but we ran out of time. But, again, you can hit this link or, separately, just email me or call me. So yep, this is my mobile number. So I have no problem giving it out. So just email me at [jeff@pedowitzgroup.com](mailto:jeff@pedowitzgroup.com). Mobile number's 404-590-9416. Again, thank you for joining us this afternoon. And I hope I was able to share some good things about marketing operations. And I look forward to speaking with you, again, soon. Thank you.