

# Rise of the Marketing Operations Function

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## Who would have thought all this would begin with research on Unicorns?

I recently delivered a keynote at a digital asset management event and my topic was Unicorns. Not the fluffy pink and purple kind with glitter! No, I'm talking about the kind of Unicorn that is now the heart and soul of Marketing Operations – the marketing technologist-- called a Unicorn because she/he is such a rare breed. (Seriously, have you ever tried to find and hire one?)

As I researched this topic, I became more interested in not only the role of the marketing technologist, but also in the rise of Marketing Operations as a transformative function within marketing.

To find out more I spent three months interviewing a group of accomplished marketers who have built and lead a Marketing Operations team. I wanted to hear what was really going on and to better understand their lived experiences.

## What is Marketing Operations?

The Marketing Operations function has exploded onto the scene because of fast-changing technology; the need for a more transparent, efficient, and responsible view of marketing; and pressure from the C-suite for marketing to contribute to the bottom line.

My first exposure to a Marketing Operations group was in 2008; and I thought it was so cool that marketing had its own group to help manage technology and improve effectiveness. Since then, the role and function of Marketing Operations has drastically changed.

Several themes emerged when speaking with Marketing Operations leaders about how they would define their function.

- One size does not fit all: Four stages of Marketing Ops groups
- Enter the left brain
- Common Marketing Operations functions
- Moving from an organic structure to an intentional structure—and the drivers that cause the shift.
- Marketing Operations as a hub

## One size does not fit all: Four stages of Marketing Ops groups

The definition of Marketing Operations and the roles and responsibilities varied from company to company.

What was clear was that this function vis-à-vis other parts of marketing was still being actively defined and changed almost daily. It was evident that one size did not fit all and that the variations in the definition had to do with company size and Revenue Marketing maturity.

As the definitions varied, so did the roles and responsibilities of Marketing Operations.

Four stages of Marketing Operations organizations emerged that represent something close to a 4-stage maturity model, or at the very least a “more” capabilities model, meaning the Marketing Operations group takes on more and more responsibility.

Each subsequent stage builds off of the one before it. Each company moved through these stages to arrive at where they are today.

## Maturity Model for Marketing Ops



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### Stage 1 - Efficient

An Efficient Marketing Operations structure typically focuses on the use and integration of current marketing technologies along with data hygiene. This type of Marketing Operations is also an execution arm for campaigns, as they “own” the technology.

*“Marketing Operations is really managing the systems, data, and processes to make a scalable revenue machine as efficient as possible. Working with sales operations, and of course, sales, together we are the revenue machine for the company.”*

— Danny Essner, MediaMath

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### Stage 2 - Effective

An Effective Marketing Operations structure typically focuses on using best practices and key processes to improve overall Marketing Operations effectiveness. This type of Marketing Operations is also focused on data, metrics and reporting.

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### Stage 3 - Hub

A Hub Marketing Operations structure typically acts as the nucleus for disparate groups including marketing, sales, the customer, IT and finance. This type of Marketing Operations provides insights and consulting to various parts of marketing and the organization that help guide and improve business results.

*“The Marketing Operations function gives structure, process, accountability and a foundation for digital marketing. It provides project management, tools, practices, data strategy, finance and budgeting.”*

— Ashleigh Davis, TrendMicro

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### Stage 4 – Strategic

A Strategic Marketing Operations structure typically includes a much broader set of functions such as demand generation/demand center elements and has Revenue Marketing type of accountability.

*“Marketing Operations (MO) is the function that is accountable for driving efficacy on both sides of the balance sheet – both improved marketing results and cost reductions. The MO group is like a factory manager who is responsible for having the right tools and resources in order to get the product out on time and with quality.”*

— Mark Maurits, Microsoft

## Enter the left brain

We all know how marketing is adopting a more analytical, technical and data-driven capability; and we understand the reasons for it. No matter how good the reasons are, it's still a disruptive dynamic and can cause many challenges for a Revenue Marketing organization.

*"Today, left-brain activities are viewed as a 'specialty' in marketing. As marketing continues to transform, the traditional, creative right-brain set of activities may become the 'specialty'."*

— Michael Ballard, Lenovo

*"The best definition for Marketing Operations is anything the rest of marketing does not want to do!"*

— Randy Taylor, LexisNexis

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*"Marketing Operations is the nerdy, left brain processes of marketing!"*

— Ashleigh Davis, Trend Micro

Michael, Randy and Ashleigh are referring to the challenge of marketing having to fully incorporate left-brain thinking and activities into a traditionally right-brained group. The task of merging two competitive approaches is partly driving the ever-changing structures, roles and responsibilities within marketing.

This is a real and persistent dynamic that needs to be proactively managed. Roles change, compensation plans change, goals change and team structures change as the role of Marketing Operations emerges. Deciding who does what, what skills are needed and ensuring a plan for hiring, training or outsourcing is a key element in adding this left-brain capability to marketing.

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*"The definition of Marketing Operations (MO) is completely different now. You know if you asked me that question five years ago, I would define it as the person who oversees the budget and the calendars and all the paperwork. Today it's really an IT department. You're managing a cloud infrastructure, and the role of the marketer in MO reflects how the role is changing. Traditionally, marketing was the right brain, creative folks like Mad Men. Today, we have to use a lot more left brain than our right brain and we're now trying to be more data scientists."*

— Michael Ballard, Lenovo

## Common Marketing Operations Functions

While there is a fairly wide range in the functions and capabilities of a Marketing Operations team across the interviewee group, there are also many commonalities.

### Technology Capability

- Use the platform
- Optimize the instance
- Integrate with current systems
- Educate users
- Recommend improvements
- Partner with Sales Operations

### Data Management Capability

- Maintain data
- Optimize information
- Analyze systems

### Measurement, Analytics, Reporting Capability

- Develop metrics
- Report routinely
- Analyze data
- Deliver key insights
- Develop a budget

### Process Capability

- Segment data
- Manage leads
- Measure campaign effectiveness
- Develop best practices

### Execution Capability

- Launch campaigns
- Test and QA
- Manage projects

*“There are three key components of Marketing Operations at McKesson that we manage. The first is the technology infrastructure to enable marketing functions. This includes the marketing automation system, the database and the database strategy. We also manage CRM...while this is unique, it really helps us better align with sales. The second key component we manage is the analytics and metrics processes for the department, and this is really critical so we can benchmark our performance and can continuously improve. The third key component is managing and optimizing key processes such as campaign execution, lead management and budget tracking.”*

— Mitch Diamond, McKesson

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*“The Marketing Operations group at LexisNexis is responsible for all marketing technologies including implementations, administration and integration with marketing and company toolsets. We use a Project Management Office, we ensure budget compliance, we manage all marketing vendors and we are responsible for the lead management process from capture through assignment.”*

— Randy Taylor, LexisNexis

*“The Marketing Operations group at Elekta encompasses both the more traditional elements of Marketing Operations such as optimizing and integrating technology with the more demand generation elements of campaign effectiveness. I love getting into the weeds of our campaigns to figure out how to communicate more effectively with our clients, improve engagement and conversions. Once our marketing communications group has a better handle on the power of the technology for building campaigns, I believe that these demand generation elements will shift out of Marketing Operations and into the marketing communications group.”*

— Chris Willis, Elekta

## Moving from an organic structure to an intentional structure—and the drivers that cause the shift.

A key theme that emerged from the interviews is how the Marketing Operations function is shifting from an organically-derived department to the intentional development of a structure.

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*“As our marketing team matured and became more sophisticated, we realized that we needed dedicated people in clearly defined roles. Not having a clear structure in place caused a lot of confusion. Now we have dedicated people for dedicated channels. So we have a dedicated inbound manager, dedicated outbound manager, dedicated Marketing Operations, and so on. We also have dedicated agencies for each of those channels. Our Marketing Operations (MO) group is responsible for database management and quality, use and integration of our marketing automation system, analytics and managing all integrations and applications across marketing. Having clearly defined roles across marketing and having clarity for the MO function has allowed us to be much more effective and allows more time for more innovation in marketing.... something we love to do!”*

— Michael Ballard, Lenovo

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- The umbrella organization was called “Marketing Operations” and included a Marketing Operations team and a Demand Generation team. The umbrella Marketing Operations organization reported to one executive.
- The umbrella organization was called the “Demand Generation Group” or “Demand Center” and included a Demand Gen and a Marketing Ops team. The umbrella organization reported to one executive.
- The Marketing Operations team and Demand Generation team were separately and run as peer and complementary organizations reporting to the same executive.

In each of these structures, Marketing Operations worked closely with or managed Sales Operations.

Even more interesting than the structures themselves, was identifying the key drivers for the current Marketing Operations structures.

### Having (or not having):

1. Marketing Operations skills in marketing
2. Executive experience in, and support of, the value of Marketing Operations
3. Marketing goals



## Marketing Operations as a Hub

Like many aspects of modern marketing, the ability to collaborate, align and influence is key to effectiveness.

Every interviewee talked about collaboration, alignment and influence as integral components to their success. They identified stakeholders and worked with them to improve both marketing and sales effectiveness. Stakeholders include other marketing team members, sales, executives, finance and IT.

It is obvious that a collaborative process and an alignment with sales are an important aspect for Marketing Operations teams to focus on.

Danny Essner, MediaMath, called the result of this collaboration the “revenue machine.” Others referred to Marketing Operations as the hub between sales and marketing that enabled synergy and results. Nearly everyone stressed the importance of sales and marketing alignment for success.

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*“I’m so thankful for the three years I spent working for a small management consulting firm that was focused on sales strategy and sales leadership. This experience helped me make Marketing Operations the hub between our marketing and sales organization. For me, understanding the business problems that a large sales organization is facing helps me be a better business partner. I can work with sales to understand the problems and then use the power of Marketing Operations to help shape new solutions.”*

— Patrick Phelan, Acxiom

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## Conclusion

It’s clear that Marketing Operations is a dynamic, fast growing and essential part of today’s B2B marketing organization. It’s also in a state of flux as marketing attempts to keep up with both the new marketing technologies and the resulting changes. Everyone I spoke to was excited and passionate about what they were doing in Marketing Operations and self-identified as a change agent and leader. It looks like Marketing Ops is a pretty cool place to be – today and in the future.

## Curious about where your team stands with marketing operations?

Take 20 minutes to assess your team’s maturity by taking our marketing operation interactive assessment.

[Begin Assessment](#)





## I'd like to thank all of the contributors

1. Michael Ballard, Lenovo, Demand Generation and Operations Manager
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5. Mark Maurits, Microsoft, Senior Business Program Manager
6. Patrick Phelan, Acxiom, Senior Manager Global Marketing Operations and Technology
7. Mitch Diamond, McKesson Business Performance Services, Director of Sales and Marketing Operations
8. Randy Taylor, LexisNexis, Senior Director Marketing Operations
9. Margaret Hamner, Director of Demand Generation, NCR
10. Chris Willis, Elekta, Marketing Operations Manager

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The Pedowitz Group – The Revenue Marketing™ Agency, is an Inc. 500 company, two time Pacesetter winner, and three time Marketo Partner of the Year. With more than 500 successful engagements completed, The Pedowitz Group helps global clients transform their marketing organizations from cost centers to revenue centers and achieve superior ROI for their enterprise marketing investments.

