

Drive Greater Value With Your Marketing Operations

Written by **Dr. Debbie Qaqish**



In the 1960s, NASA had a room full of mathematicians whose sole job was crunching equations to calculate and then recalculate data to determine a trajectory for a space launch. They were known as **"computers."** Running all the necessary numbers would take the team upward of three months, as well as specialized skills and advanced knowledge.

Today, running that same set of numbers takes a modern computer a few minutes. With the exponential increase in the ability to handle and process information, NASA is able to do more sophisticated work with higher accuracy and put their talent to work on much bigger challenges.

In marketing, we're able to do the same thing. We have volumes of data on our customers and their behavior that's made comprehensible by algorithms and computing.

But setting up systems to drive marketing efficiency, collecting data on what's working and what's next, and constantly using that insight to increase effectiveness is the task of a very elite team.

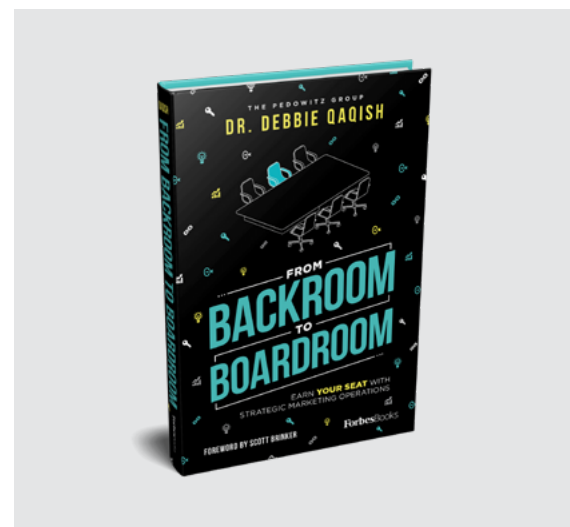
They are the rocket scientists of your organization.

They are marketing operations.

Are you ready?

To answer this, let's discuss the elements you need to produce a world-class marketing operations team. With this team in place, your marketing function as a whole will evolve into a revenue-generating center of excellence. I first published a whitepaper on this **in 2018**, and you can regard this as an update on those thoughts (with much more added in!).

Goodbye being seen as a cost center or a department that's always secondary to others ... hello revenue!



*Dive even deeper into marketing operations with Dr. Debbie's **book!***

In order to fully realize the value of Marketing Operations, let's dive deep ... click to jump to a particular section!

1. **Understand the Definition of Marketing Operations (and the three areas they really impact)**
2. **Enable Digital Transformation**
3. **Improve Business Accountability**
4. **Lead Customer Centricity**
5. **What Stage Are You? The Marketing Operations Maturity Model**
6. **Know (And Communicate) Its Value To Key Stakeholders**
7. **The CMO**
8. **The CFO**
9. **Sales**
10. **Other Executives**
11. **Sell Its Value**
12. **Develop Team Structure**
13. **Identify Key Roles and Find Talent**
14. **Establish Team Goals and Strategy**

Buckle up, or maybe block some time on your calendar. We're about to dive in and examine this from all angles.

Want even more? Think through your team(s) with **this talent bundle**, and read how leading companies such as **F5 Networks, Tracelink**, and a **Fortune 100** financial services company applied these concepts for success.

What A Strategic Marketing Operations (MOPs) Function Is

At the highest level, MOPs teams are broadly chartered to work across functions within and outside of marketing to focus relentlessly on improving marketing efforts.

They are simultaneously tamers of complexity and infusers of sophistication who transform not just marketing departments, but entire organizations.

At its core, marketing operations is a team of people skilled in marketing technology; Software as a Service (SaaS); data management; vendor management; process innovation and optimization; and metrics, reporting and analysis. They provide the infrastructure, processes and reporting that power the revenue marketing.

Frequently, this group also manages the training and education services for marketing. This group is not only expert in the technology execution, but in best practices governance that should be followed, ensuring a cohesive customer experience of brand through all outbound and inbound campaigns.

This definition can seem really broad, because, well... it is!

We've seen roles and responsibilities vary widely from company to company who have invested in a marketing operations function. The largest factor to this variation has to do with a company's **Revenue Marketing** maturity.

What's Driven This Need

If you've been anywhere near marketing, you've seen the technologies available explode (cue the obligatory Scott Brinker **graphic** reference, right?).

Nearly overnight, conferences focused solely on MarTech sprung up and have become must-see events. The job market has exploded, and top talent was already getting poached pre-COVID.

Add in a shift towards greater financial accountability, greater pressure on companies to transform into providing more customer-centric experiences, and battling legacy thinking and processes that marketing is the "make it pretty" department and you have a clear need for any company looking to lead.

In addition, B2B customers now require a B2C experience – after all, B2B buyers are B2C somewhere else! Our experiences as consumers across the digital landscape drive our expectations, forcing many companies to rethink how they engage customers and embrace that totally-overused-but-still-valid term... digital transformation.

Think about your current marketing department.

Who, within it, is most likely to be able to answer these questions:

- What kind of data do we have, and what does it mean?
- What was the most effective money we spent this year?
- How do we spend more that way?

Many executives struggle to identify someone who can answer one of these questions, let alone all three.

Typically, the answers are held across different people, on different teams. And the problem is that those people don't come together with their individual pieces to see a big picture.

Marketing operations is like a special forces team.

It's an elite cadre of people charged not with specific marketing tactics, but with the goal of looking at all efforts and making them more efficient, and more effective. MOPs is a centralized function, the source of data and insights for leadership decision making, and the basis for marketing productivity, agility and accountability.

They cross all roles, uniting the work of marketing.

- Within the charter of a MOPs team, we'd expect to see three areas of intense focus:
- Enabling digital transformation
- Adopting business accountability by driving revenue and growth
- Leading customer centricity.

These three areas are important for MOPs because they are the transcendent ones. Not only do they cross marketing functional areas, but they also bleed out of marketing into other units. This makes them harder to tackle, but it's worth it because these are the three areas that also make the biggest impact.



MOPS at a Glance

Titles	Analysts, competitive intelligence, data management, project management, marketing technology and vendor management, training, and process experts.
Goals	<ul style="list-style-type: none"> • Drive efficiency and effectiveness • Driving marketing's revenue goals • Technology and process optimization
Capabilities	Technology, data, measurement, process, and execution.
Key partners	Sales, customer service, IT, product line, and other key business units.

Enabling Digital Transformation

Marketing operation's most important role is as strategic steward of intelligence, and typically that also means technology. For digital transformation, while technology tends to be the first concept organizations think about, it's not the only hallmark that should be examined for successful change.

We're looking to a MOPs team to engrain marketing technology into the enterprise as a whole, and then use insights to drive revenue. By driving connections deeper into the organization, more work is made possible, and more data is captured. Then, the data is mined for insights. The insights are put to work. The work pays off in increased revenue. And over a relatively short period of time, the technologies become ingrained.

It's a lot like the shift that happened when we stopped doing complex math by hand, and turned the tasks over to computers. In the 1960s, it would take a team of people three months to calculate a launch trajectory for a NASA space flight. Today that work takes a few minutes or less.

Most organizations can access volumes of information, but it takes leadership from MOPs to make sense of it and find transformative insights within the data.

It sounds so obvious, but when you try to pull it off, you begin to understand the complexity. Our favorite example of this at the moment is intent data. We can get more insight than ever about what prospects are likely to do. But it has two big strings attached:

1. Getting this data requires specific expertise and/or it's expensive to attain.
2. Once you have it, you need to know what to do with it.

A strategic marketing operations team tackles these problems. When the team is deeply ingrained in your organization, they dig deep for data. They integrate it with platforms to amplify insights with other data in other systems, and strategically work with vendors on the outside to curate a stunning array of insight. From there, it's all about action.

Like a great connector, MOPs serves up the insights to the right teams—often sales—who can act on it and turn it into points of conversion to drive revenue.



Business Accountability To Drive Growth

Marketing organizations traditionally have to fight for budget, especially if you have not transformed into a **revenue marketing organization**.

That's because when you and your executive team hand money off to marketing, it can sometimes be an act of faith. You know the money makes an impact...somehow. But you've got little more than logo-emblazoned swag to show results for the investment.



Business accountability
is a beautiful thing!

Marketing operations should include an element of financial accountability, so that every dollar invested in marketing has a forecasted return. Year over year, budgets are geared to the activities that build revenue, and your ability to see what those activities are is how you build your case for budget and growth.

Over time there's an ironclad, undeniable benefit to this approach: marketing's value is demonstrated in finite detail.

- Business case: fortified.
- Investments: returned.
- Future requests: granted.
- Your role in revenue: undeniable!

Leading Customer Centricity

Marketing operations puts one question at the heart of every activity: "how does this serve our customer(s)?"

This question is supported with two key elements: a customer profile or buyer persona, and a customer journey. And the answer is a blend of art and science.

Buyer personas clearly describe what levers need to be pulled to engage your customer.

The customer journey describes the sequence you need to pull the levers to lead to a sale. It helps you identify which behaviors or data points indicate a prospect isn't right to buy so you stop directing effort at converting them. (Wondering if you need to update yours? [Click here](#) to read more)

Answering the call to put the customer at the heart of all activities is partially in the realm of tech geek to mine data and technology. And it's a yet-to-be-recognized art form, in that it takes a lot of creativity to orchestrate a process that humanizes data, and gives it a personalized element that engages your prospect.

Much like directors move us with stunning films, painters inspire us with beautiful color, and musicians stir us with awesome music... marketing needs to create and connect with customers.

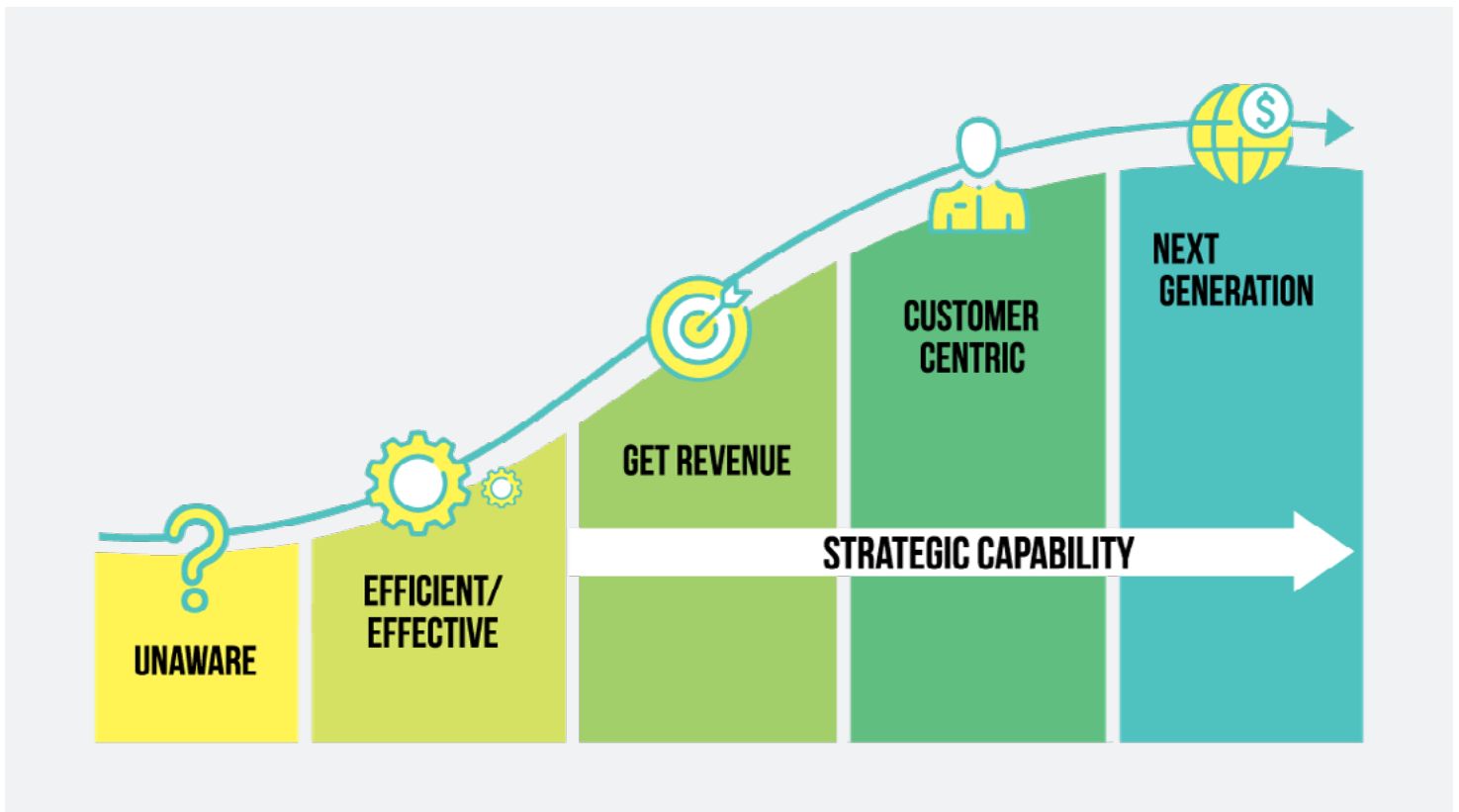


The Marketing Operations Maturity Model

Now that we have a broad definition, let's figure out where your team might fall in terms of maturity.

Over the course of 15+ years, we've seen a gradual evolution in marketing operations teams. While you may not have a formal team, pay attention to the markers of each maturity stage – you may be surprised at what capabilities your organization already possesses!

We can assess our clients and provide a readout as to where your organization is – and what steps you should take to move forward.



We can assess our clients and provide a readout as to where your organization is – and what steps you should take to move forward.

🎯 Stage 1: Unaware

I call this the "OMG" stage. Disparate groups perform uncoordinated tasks with no central vision or leadership – effectively, the entire marketing organization is siloed.

Company go-to-market strategies might be centered on products, not customers. The tech stack is relatively basic, but gathered data isn't truly acted upon.

These days, you won't find many companies who fall into this stage, but in the mid-2010s it was far more rampant.

Stage 2: Efficient / Effective

In this stage, there's an acknowledgement of the need to develop marketing operations, but not necessarily the commitment or budget. Typically, a team member dedicates most of their time working to optimize various tech investments, but they're often on their own.

Some best practices might emerge, foundational reporting is created, and a standard operating procedure for selection, implementation, and integration of systems / tech is in place.

The perceived value of this group revolves around automating previously-manual processes with technology, providing clean data, and insights into metrics.

Stage 3: Get Revenue

This stage is characterized by doing the right things. The MO function is imperative to driving marketing as an economic engine that's both efficient and effective.

A formal budget is in place to support its function, with a dedicated leader who's strategic and tying efforts to financial outcomes and key business objectives.

The tech stack is sophisticated, with the team feeling it isn't far behind (if at all) the general marketing curve, and there's a roadmap that's forward-thinking.

However, the team is still functionally a silo. They're primarily focused on marketing's needs, and this continues to create problems with other parts of the business.

Stage 4: Customer Centric

Now, the team is instrumental in operationalizing marketing accountability and is driving transformational activities in the business. It's a source of data and insights that allow marketing to forecast its impact on revenue + driving customer insights and even leading those conversations on what the customer wants.

The MarTech stack is fully-integrated and optimized and each tech has an answer to the question of "how does this serve the customer?"

But even still, there's more to be gained.

Stage 5: Next Generation

a.k.a. the "one customer line of sight across the business" stage.

Marketing operations works with other teams such as customer operations and reports into the same leader. This evolution can be represented in the trend towards revenue operations, where sales, marketing, and even customer service roll up to the same leader, who's often in the C-suite.

There's equal focus (and investment) on customer acquisition and customer expansion, and multiple teams lean on the same view across any part of the tech stack for a holistic view of the customer. Responses can be nearly in real-time to changing customer demands due to reliable, trusted data.

The True Value(s) of Marketing Operations

If you want to jump to a particular section, here's how MOPs brings value to the **CMO, CFO, Sales, and Other Executives.**

The Value To The CMO

A fundamental flaw in typical CMO thinking has a big impact on performance. As they try to lead the charge to transform marketing from a cost center to a revenue center, they have been trying to make this change by applying right-brained thinking to a left-brained problem.

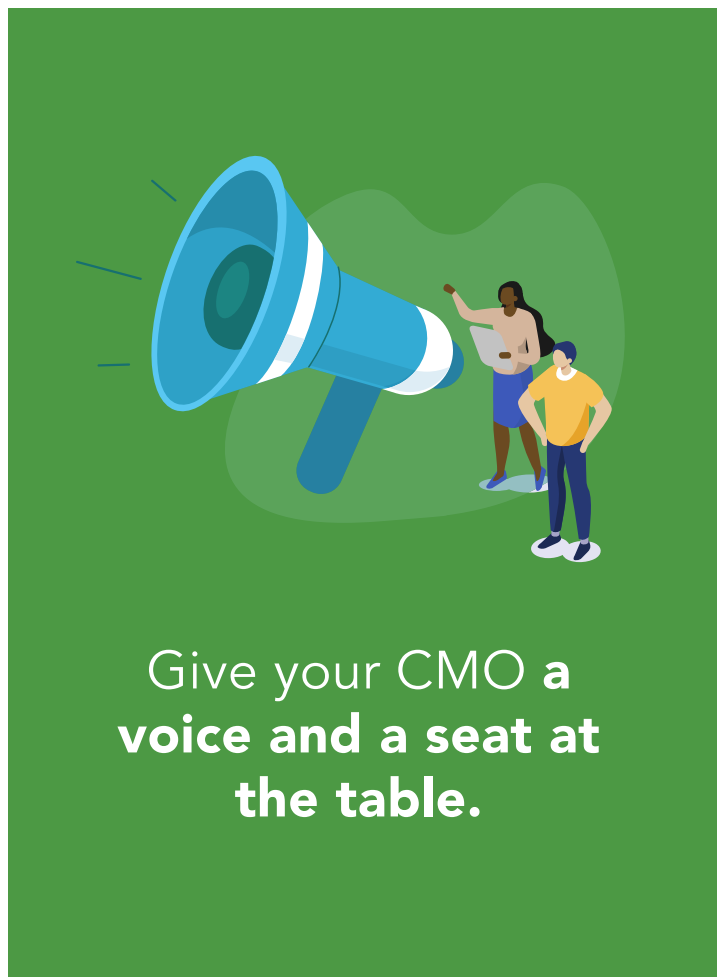
This is probably why few CMOs report any type of long-term financial metrics. The moment technology invaded our world as consumers and as marketers, the need for left-brained thinking became apparent. Yet, for many CMOs, their first foray into the technical and revenue accountability world was implemented with the wrong mindset and skill set.

The lucky CMO now has a second chance. The strategic marketing operations team can provide the required left-brained competencies, along with the mindset and skill set for technology, marketing and business acumen. Some people call these left-brained marketers (LBMs) marketing technologists; some people call them data scientists.

The LBM possesses a combination of general marketing skills, business acumen and deep technical and data analysis skills. Working in a marketing operations structure, the LBM is dedicated to technology (integration and optimization), data (understanding and producing shareable and consumable insights) and process optimization.

Companies that have highly functional MOPs teams also demonstrate more revenue contribution than companies without it. The melding of technology, data, marketing and analytics allows the CMO to gain transparency to how marketing efforts impact the pipeline and closed business. Any CMO who can produce credible revenue numbers and also forecast marketing's impact on revenue is supported by a highly effective MO team.

Because of the group's focus on data collection and analysis, the CMO has access to all the numbers to run marketing like a business. This kind of CMO runs a profit-and-loss statement and evaluates every expenditure to ensure the highest return. She / He also uses data to figure out where and how to apply limited resources to optimize marketing ROI.





Without a highly-functional MOPs team, none of these business processes would be possible.

Once the CMO begins to produce credible revenue and growth, marketing gains credibility with the entire executive team. The CMO is perceived to be an equal and becomes more actively involved in the formation of company-wide strategies.

The Chief Marketing Officer has gained a voice and a seat at the table.

The Value To The CFO

- More business predictability
- More control

Historically, the CFO would rather stand in a cold shower tearing up \$100 bills than sit down and talk about marketing budgets, at least they are sure they know where that money is going. The rise of the marketing operations team is making the CFO do the happy dance as they enjoy, for the first time, transparency into the marketing P&L statement.

As the MOPs function continues to mature, it enables tangible and credible marketing results as measured in pipeline and revenue. Not only can marketers describe past performance, but they can also now forecast future performance. This transparency and data-driven process allows the CMO to understand and work with marketing numbers to better impact overall company performance. Finally, the CMO has more control over a very large budget and can weigh the outcomes.



Dive into Dr. Debbie's book on strategic marketing operations!

The Value To Sales

- More revenue and quota attainment
- More competitive sales team

It's no secret that marketing and sales have a checkered past. For too long, each group lived and worked separately with no reason to work together. Once marketing began to embrace marketing automation tools and customers started becoming digital, marketing began engaging with sales. Unfortunately, this engagement often yielded poor results. Reasons included marketing not understanding sales and sales not understanding the new digital possibilities.

One exciting effect of a strategic MOPs team is how they create highly beneficial and synergistic relationships with sales. It goes back to the right-brain versus left-brain approach. Salespeople are very black-and-white and driven by one immediate metric: quota. When the MOPs team uses data to analyze current processes and then uses technology to implement those improvements, the sales team is the ultimate winner.

By providing real-time customer information to sales, the sales team can be more competitive and win more deals. Sales productivity improves, and quota attainment also improves. All of this is possible in partnership with a strategic marketing operations group.

*Related: Key stages of **successful lead management** for stronger sales / marketing alignment*

The Value To Other Executives

- A new tool for driving company growth
- A way to respond to the digital economy and the customer

The rise of marketing operations plays a key role in enlightening the executive team on the possibilities of using marketing as a new revenue and growth tool. As marketing operations embrace technology, data and analysis with the goal of achieving business objectives, marketing becomes a driver of revenue and company growth.

Executives are consumed with how to do business in the digital economy and with a customer who is now in firm control. Technology has changed both our personal lives and our professional practices to the extent that what worked in the past for executives does not and will not work in this engagement economy.

The MOPs team is sitting on top of a world of customer data that can be mined and analyzed to produce key customer insights for better decision-making. No executive likes to make key business decisions without data; and, while gut instinct may work in some cases, given the speed of business today, real-time data is needed. This is the ultimate role of the MOPs team, and it is possibly where they will have the biggest impact on the future of the business.

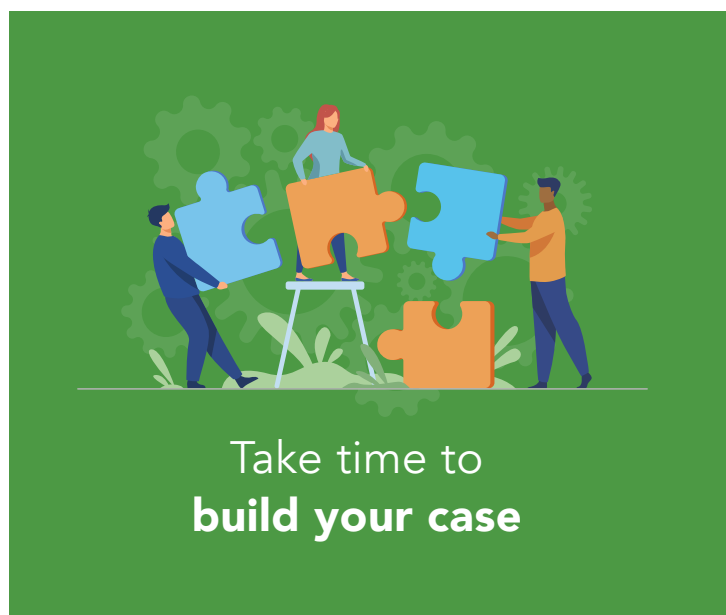
Selling Its Value

As you work to build out an effective and strategic MOPs team, you will need to enlighten many key stakeholders.

The strategic MOPs team works across disciplines, and getting other groups' buy-in and nurturing relationships is critical. Take the time to examine who needs to be a part of your empire-building and then be ready to educate them.

Your stakeholders are willing to partner if you can be clear about what's in it for them. Use the information here and from other sources to build your case

The strategic marketing operations team creates benefits in many ways and across many parts of your organization.



Your Marketing Operations Structure

Marketing Charter

Before we dive into structure, let's talk about intent. As a leader in your marketing organization, you need to set the intent of this Rockstar team. Establish a charter and your structure will follow.

Here are a few examples of charter statements we've seen over the years:

"To take a holistic and single-threaded approach to optimize technology, process and data across the entire customer life cycle to drive revenue and growth."

Alex Simoes, RevOps Pioneer

"Optimize marketing effectiveness with leading-edge technology, optimized process, clean and current data, and rigorous analysis."

"With digital transformation as the foundation, to build a unified operational capability that improves revenue performance through one line of sight to the customer."

"Our charter is to enable the marketing team to achieve our overall goals. And our goals are—all around—creating pipeline and delivering on our revenue contribution."

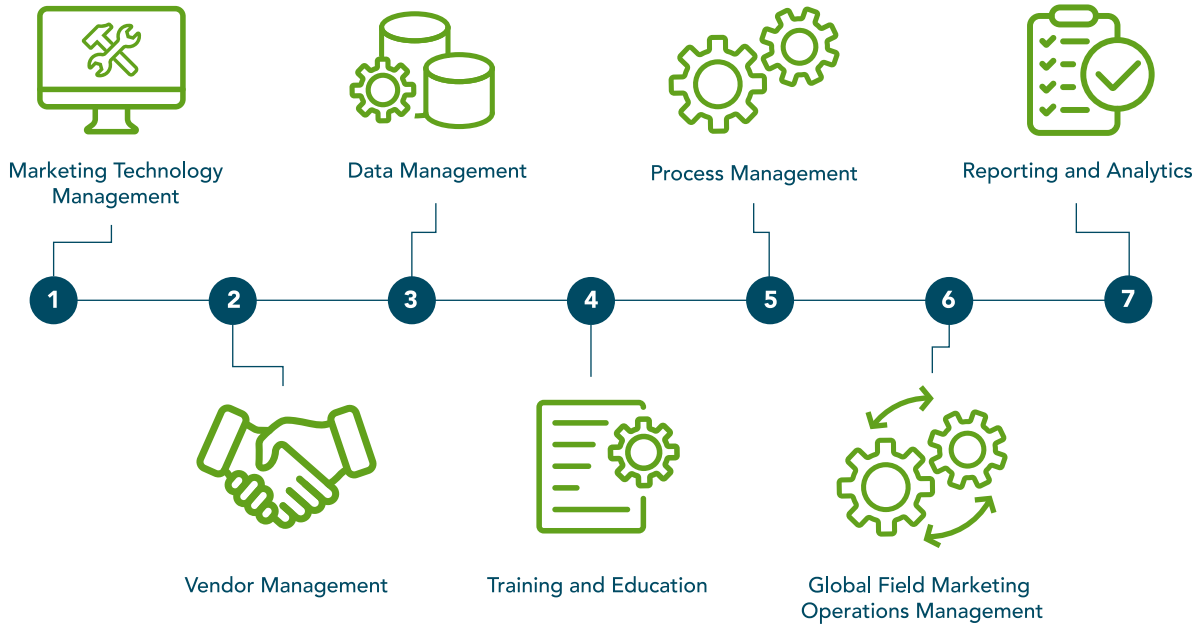
Kira Mondrus-Moyal, Senior Vice President of Global Marketing, Tricentis



Can we talk about org structure now? I need to start hiring!

Almost J With your charter articulated, you can now begin to focus on structure. Your first goal is to centralize the management of technology, process, data and marketing analytics to make your revenue generation efforts more efficient, effective, transparent and accountable.

To do this, you'll need to collect a number of responsibilities in this unit. Typically, many of these already exist across your organization:



- MarTech strategy, selection, integration and optimization
- Vendor management
- Data management, governance and optimization
- Process engineering and optimization
- Measurement, analytics and reporting
- Project management, training and education
- Change management
- Campaign execution and content operations

All MO groups are a function of the unique needs of their company. We see many configurations, and there is no right or wrong. What is important is to be intentional in the structure and to ensure the structure meets marketing’s strategic demands to achieve the company’s measurable growth objectives.

Below is the most basic of organizational charts commonly-seen in a stage two marketing operation:



Related: Read [how to build a modern marketing team](#) for success

Identify Key Roles and Find Talent

Okay, you made it. Let's talk about roles and talent. At its very core, your marketing operations team needs the following roles:

Director OR VP of Marketing Operations. Find a change-loving marketing "ninja" who is comfortable with technology, building consensus, and has a business and process mindset. It's important to be at home with revenue accountability, finance, and reporting as well as the creative pursuits that marketing is more typically known for.

Finding someone with this balance is generally very difficult!

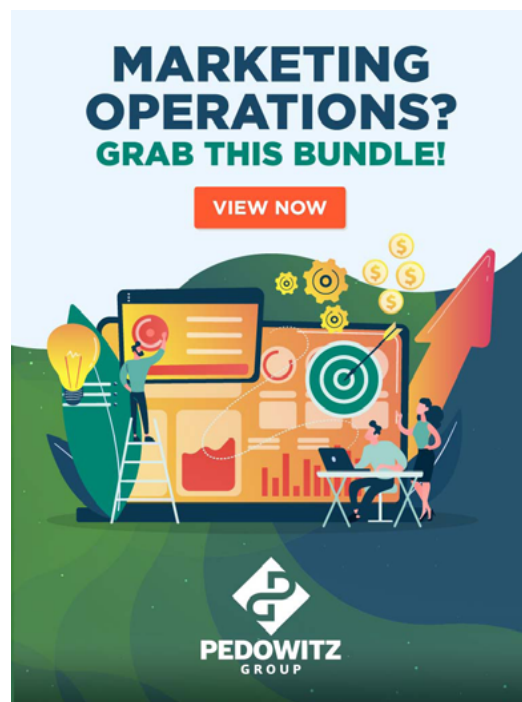
Reporting to the VP of MO are key functions led by:

- Director of Marketing Operations
- Marketing Automation Manager
- VP of Analytics
- Senior Analyst, Marketing Collaboration

Marketing Charter

Completing your team is the next challenge, and this is your hiring priority list:

- **Technologist:** someone who can set the direction, lead governance and integration initiatives. They also take on vendor management.
- **Data whiz:** this could be a data scientist, or someone well versed in reporting and analytics.
- **Process Engineer:** Outsource this to someone high level who can step in and lead change through the transition.
- **Trainer:** Another role right for outsourcing, since the skills span different systems and your vendor support is the best bet for quality instruction.
- **Project manager:** borrow a good project manager from your IT function until the team has need for a full-timer.



THE RISE OF THE REVENUE ANALYST

I've rarely seen this role on a marketing operations team. It seems to fall on the VP or CMO to figure this out (on top of everything else they're responsible for).

My premise is that if a marketing ops team had a dedicated revenue analyst, marketing would overachieve their number. Let's look at two key elements for this proposed role:

Sales background

The focus of the revenue analyst is to optimize not just marketing performance in general, but a specific number. That number might be the contribution to the pipeline or closed business in terms of percentage and dollars.

It would not be a number of MQLs. With this focus, I suggest this role needs a sales background and needs to be intimate with how a sales funnel works.

Deep knowledge of customer lifecycle

Next, the revenue analyst needs to be an opportunity spotter.

Translation: she uses data to continuously examine the entire customer lifecycle from acquisition to expansion to advocacy (think an **infinity loop**) and determines the best opportunities where marketing can invest and get the greatest return.

With a deep analytical acumen that is passionately applied to spot the best ROI opportunities, the revenue analyst is poised to optimize MarTech for its ultimate purpose – making marketing accountable for revenue.

Clearly, marketing has other responsibilities such as customer engagement. My argument is that the revenue analyst can only drive optimal revenue results based on a deep understanding of the customer.

In this sense, the revenue analyst role is a potential two-for-one win.



Finding Talent

As frustrating as talent acquisition may be, there are only a few ways to approach it. There are no shortcuts, and there are really four main strategies to get your team up and running as fast as possible:

1. Rent the talent and hit the ground running.
2. Hire outside experience and hit the ground running.
3. Transfer talent from within and develop.
4. Hire young professionals and develop.

The Need To Be More

Marketing operations is a capability. If someone leaves the organization, the capability does not. It is driven by strategy and operationalized through people, process, data and technology.

It delivers a business result.

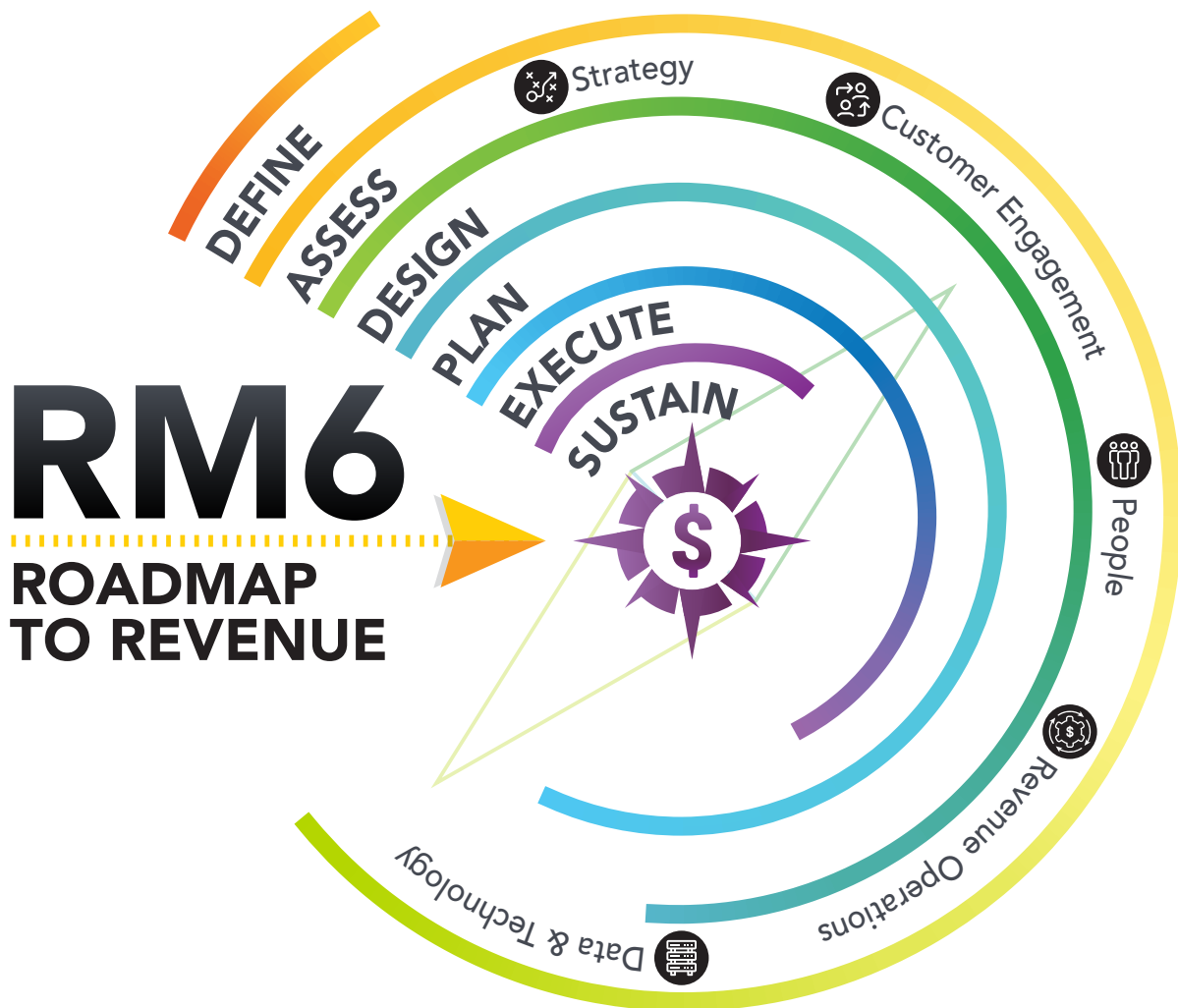
This is why it is **CRUCIAL** to invest in knowledge management for your marketing operations team. Talent is hard to find and harder to keep. Without documentation to help with transitions, you'll find yourself in a cycle of reboots without any tangible results!

Goals and Strategy

With a team in place or on the rise, it's important to clearly set their direction. This becomes the most important role for leaders at the top of an organization.

We typically see the following five demands drive organizational change and the need for MOPs, so they are a good place to start with chartering your team.

1. Increased need for marketing efficiency and organizational agility
2. Changes to meet customer behavior, market conditions and business direction are too slow
3. Revenue, margin, profit and market share need to improve.
4. Marketing is not valued and seen as a cost center instead of a business, with formalized best practices, processes, infrastructure and reporting
5. Data to make market, customer, and product/service decisions that create value for customers and shareholders must be better leveraged.



Addressing these questions means a focus on six key areas (which happen to align to the pillars of revenue marketing), each with questions to consider while setting goals.



Strategy

In the earliest days of a MOPs initiative, there's some necessary navel gazing to understand where to start within your organization.

- How willing / ready is your company and leadership?
- Do sales and marketing work seamlessly together? Or is it a fractured relationship?
- Is your marketing team "in the know" on what product teams are doing, and is there a strong working relationship between teams with good, proactive communication?

People

This pertains to anyone in marketing, who's aligned with marketing, and the organizational structure around marketing. Especially because members of this team are so hard to hire, part of this conversation might be

- What skills does your team need – and what needs to be done to get them (through new talent or training existing talent)?
- For every group that interacts with the customer (at any point!), who's the stakeholder(s) in each you need to work with to build greater alignment?
- How can / should marketing lead your focus on customer experience?

Process

This is typically the first area that can be addressed, as marketing has more influence in this area.

- Are campaigns / programs well-oriented to what you see in the market? To what product managers, etc. see in the market?
- How confident are you in your data? What about as it flows between systems, such as a marketing automation platform and your CRM? Who controls what data is deemed "best" in your organization ... and how does this impact you?
- Is your lead management process excellent? Or does marketing feel there is significant lead leakage in the pipeline?
- Who governs processes and enforces agreed-upon standards? (This is very important!)

Technology

If you don't have the right technology, you cannot fully embrace a true customer-focused approach! In our Revenue Marketing Index, we found 82% of CMOs it's important to be fluent in understanding tech from a strategic perspective to fully enhance demand generation efforts to better impact revenue.

- Does your current technology allow you to provide personal, targeted experiences for customers both now and two years from now?
- What does the marketing team own? This impacts your ability to lead in this area and may tie in with "people" above.
- Are you fully leveraging what your current tech is capable of? Do you know how to find out?
- Do you have regular meetings to review your tech stack and ensure it is updated, data is flowing, and processes are being enforced?

*Related: Our **MarTech consulting services** optimize your current stack and save you money*

Customer

This really gets to the heart of your customer journey from initial engagement to post-purchase nurturing.

Really, it gets to the core of the sales / marketing relationship and how well each works with the other on the entire customer lifecycle.

Who owns the customer? What about after they become a customer ... how to you continue to invest in the relationship? What are their expectations?

For more on this topic, dive into **updating your customer journey**.

Results

None of your marketing matters with measurable impact – and none of the impact matters unless you can trace it to revenue for the business. Focusing on repeatable, scalable, and predictable processes and outcomes only strengthens this area.

- What is the one customer metric that equates to financial value?

This allows you to anchor reporting efforts around a central theme that will resonate with key stakeholders (and build more marketing credibility within your organization).

Get Started + Next Steps

Now that you understand how to realize its full value, it's time to something about it! Here's a few next steps:

Dig into **building a CoE** or grab **this strategic bundle** of documents to help you!

I've written a book on this very topic! **From Backroom To Boardroom** has so much more as a deep-dive into marketing operations and how it not just earns a seat at the revenue table, but also how to build on its success

And you can always look into our **marketing operations consulting** services if you want to drive key changes throughout your organization for revenue impact.