Revenue Marketing Center of Excellence

A model for Building a COE For Your Organization
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Executive Summary

As the consumer continues to evolve, the role of marketing must follow suit or suffer the consequence of becoming nearly obsolete. Remember, "a Kodak moment?" What ever happened to Kodak? In the mid '90s, digital photography emerged in the market with force. Put simply, Kodak failed to adapt to evolving consumer interests and the changing context of their business, and over the following decade, their revenues dropped consistently. In 2012, Kodak filed for bankruptcy. The following year, they sold off nearly \$525 million in patents to stay afloat.

So, what exactly does that have to do with Revenue Marketing? Two major technologies have taken hold of our business environment in the last 20 years: 1. Mainstream utilization of the internet to find anything and everything consumers need quickly and easily and 2. The introduction of Marketing Automation Platforms (MAP). We know that consumer behavior has evolved; this applies to both B2B and B2C purchases. With the introduction of MAPs, marketing has a digital lens that allows us to record and very closely examine the new consumer behavior. We can now meet our buyers where they are and customize our messages to resonate with them in the right place, at the right time, using the right medium. As a result, most marketing organizations have shifted their go-to-market strategy to become more digital and more customer centric. Failure to adapt to the changing consumer landscape will force traditional marketing into a "Kodak moment" of their own. What we are seeing in the market today is many organizations working to evolve from a traditional marketing cost center into a digital marketing revenue center. To evolve, a new organizational strategy and a new structure are required if one is to achieve the desired business outcomes.

With that in mind, we are often asked what the right structure is for a given organization. We believe that the Revenue Marketing Center of Excellence (RMCoE) is an enterprise organizational structure that supports, enables and drives the practice of Revenue Marketing. Building an RMCoE is the job of the CMO; it is a strategic initiative involving executives, sales and marketing.

A Revenue Marketing Center of Excellence is comprised at a minimum of three parts: a Demand Generation group, a Digital and Content team and a Marketing Operations group.

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Figure 1. Revenue Marketing Center of Excellence

The **Demand Generation Group** comprises people skilled in ideating; creating; building; and launching complex, omni-channel, multi-step inbound and outbound campaigns, which are designed to streamline customer acquisition, increase the number of new customers, accelerate time to deal close and fill the sales funnel. They may also further qualify leads before passing them to the sales channel with a tele-qualification team.

The **Digital and Content Team** comprises people skilled in website construction, SEO/PPC, social and content creation. Inbound campaigns are typically managed here, but since they are so interwoven with outbound campaigns they may be originated and directed by Campaign Strategists in the Demand Generation Center.

The Marketing Operations Center comprises 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 Center of Excellence. 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.

Large enterprises, as they move from traditional outbound marketing methods to revenue marketing, will evolve their organizations toward the Revenue Marketing model shown above over a period of 2 - 3 years. Initially some functions will be outsourced and new skills will need to be acquired. Some functions will retain their existing reporting structure (SEM team or creative services) whilst others will be built new from the ground up.

Revenue Marketing is not an overnight transformation of marketing. It is a journey. The roadmap includes changes in strategy, people, processes, customer focus, technology and metrics. For those organizations who commit to the journey, the reward is a marketing organization that is accountable for revenue and whose influence on the bottom line is measurable, repeatable and predictable.

Traditional to Modern Marketing Organizations Structures

Traditional Marketing Organization Models From the 1990s Do Not Work

For many global organizations in the early 1990s, their marketing organization looked something like this:

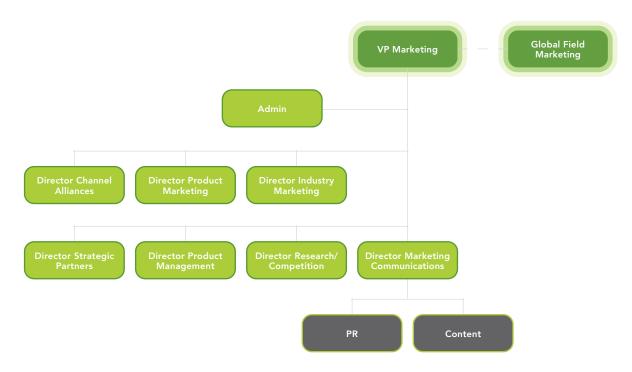


Figure 2. Typical Global Marketing Organization in the 1990s

"Traditional" marketing organization focused on activities like advertising, PR and tradeshows, with an emphasis on producing brochures and sales collateral. They were measured in terms of outbound activity, constantly analyzing "spend" and, as a result, were viewed as a cost center. While many of these 'traditional' marketing organizations still exist today, most marketing organizations have begun to shift into lead generation mode and then on to demand generating machine over the last 20 years. They are moving from product-centric marketing to customer-centric marketing with a laser focus on only investing in marketing tactics that can be directly linked to revenue growth.

The Revenue Marketing Journey™ Traditional Marketing Marketing Focused on Brand Building Integrated MAP with CRM Implemented Data & Systems Email platform are Optimized and Impresssions Product Focused • Customer Centric Customer Centric • The 4 Ps - Data - Digital across the Tactical, one off Body Language Enterprise Marketing is Not emails, Batch and a Line of Business Blast Multi-channel Operations/ Nurture/Trigger structures are Marketing & Sales • Little to Negative Campaigns Managed in Silos Alignment Ongoing, 24x7 • RPS - Repeatable, and Marketing A Sales & Predictable. Marketing Revenue Scalable relationship Synergy with Sales Metrics Metrics Metrics Metrics • Measured on costs • # of "leads" sent • % & \$ Contribution ROI to Sales to Pipeline & Measured on Forecasting Closed/Won activities Cost Per Lead

Figure 3. Transformation Journey from Traditional Marketing to Revenue Marketing

Organizations in the Lead Generation stage uncover new prospects to pass to the sales organization. These "leads" often have minimal information, but fulfill the measurements of how many, clicked, opened, had web page visits and so on. These activities are more measurable, but do not change the perception that marketing is "only" a cost center where "number of leads" kicked over to sales is a common metric.

Those organizations that have progressed to the Demand Generation stage are more strategically and technologically advanced. They are aligned with the sales team's goals and have a Marketing Automation platform that is fully integrated with CRM. They have visibility into the pipeline, monitor conversion metrics and can attribute revenue to marketing. These teams have moved away from being a cost center and can prove "attribution:" the primary ingredient to being a revenue contributor.

The ultimate stage, Revenue Marketing, is similar to that of Demand Generation from a technology standpoint. However, these teams have implemented strategies, processes and best practices so their measurements and contribution are repeatable, predictable and scalable. Similar to sales forecasting, Revenue Marketers are able to forecast marketing contribution to pipeline and revenue.

The difference between Traditional Marketing and Revenue Marketing drives the need for a different organization.

	Traditional Marketing	Revenue Marketing
Focus	Focus on outbound touches	Focus on revenue contribution that is measureable, repeatable, predictable, and scalable by driving meaningful omni-channel interactions with prospects and customers.
Process	Informal, minimal processes for handing off leads to sales and improving operational efficiency for the marketing business	Formal and efficient processes, reinforced with technology, constantly refined and supported with SLAs
People	Leaning toward creative	Balance of analytical, creative and technologically savvy
Content	Design for print, leave behinds	Designed to drive engagement in an entertaining format, content is repackaged in multiple media formats
Metrics/ Results	Impressions, new leads, attendance	Revenue attribution, funnel velocity and volume
Global Marketing	Isolated, translates collateral, helps close deals	Integrated with HQ, leverage HQ campaigns and Best Practices to drive local demand
Sales Cycle	Buying cycle and Selling Cycle start at the same time	Buying cycle starts long before the selling cycle – the challenge is to capture/influence the digital footprints
Lead Generation	Largely events, list rental for direct mail	Online capture of visitors from many sources
Nurturing	Sales calls and direct mail	Social Media, nurture campaigns, educational events, newsletters, user groups, etc.
Media	Direct mail, telephone, PR	Direct Mail, Telephone, PR, Website, Syndication sites, Online advertising, Social Media, IMS, Chat, Email
Technology	Printers and phones, marketing database	Phone, websites, search tools, Marketing Automation, marketing resource management, data management tools, Business Intelligence, social media tools, content management tools and 3000 more!

Table 1. Differences between Traditional Marketing and Revenue Marketing

The move to Revenue Marketing, wherein marketing is accountable for hitting revenue targets, requires a new organization: one that leverages technology to make revenue attribution possible, one that focuses not simply on measuring activities, but rather on measuring results.

Spawning new groups in marketing to deal with new technologies or skill sets is not a good long-term solution (a website group, an SEM group, an analytics group, a database group, a content group etc.)

We build the most successful organizations by aligning people at the lowest level with goals at the highest level. To be successful in marketing now we will be well served by having a Revenue Marketing Center of Excellence. This group reporting into the CMO whose number one goal, in the words of Theodore Levitt, is to "create and retain customers." (I.e. they are goaled on creating and accelerating warm qualified leads in the funnel that lead to opportunities; they are goaled on customer loyalty; they are goaled on revenue results. They are Revenue Marketers.)

A Revenue Marketing Organization Model for the Next Five Years

There are some parts of the marketing organization that continue in the same form from the '90s to the '10s including product marketing, public relations and brand. The elements that need to evolve, merge

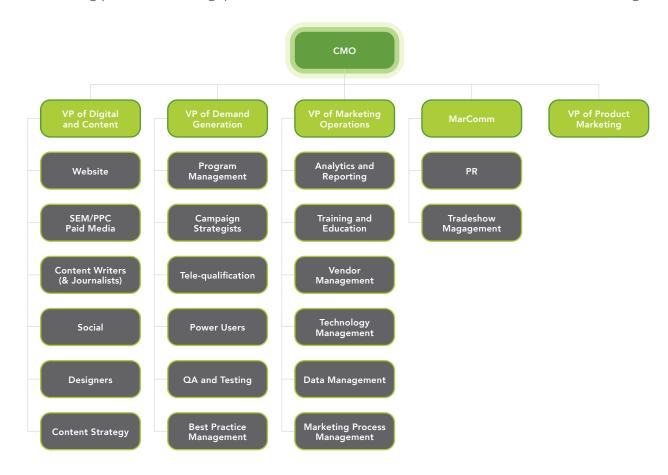


Figure 4. Idealized Global Marketing Organization in the 2010's

and reform under a single Revenue Marketing goal are the groups responsible for interacting with prospects and customers, generating and nurturing leads, creating content and assets/offers, and field marketing. In addition, enterprise marketing organizations will require a Marketing Operations group that focuses on reporting and analytics, managing the marketing technology and vendors, managing data, and optimizing processes.

It is unlikely that any large enterprise will be able to transform overnight into the organization shown above; this would cause too much upheaval. It is more likely that the existing organization will transform from Traditional Marketing to a Lead Generation group, and perhaps even to a Demand Generation group over 2-3 years. During this process they add a website team (not just one person) and an inbound marketing team, expand their creative and content management capabilities, and add social media expertise. Ideally, these teams would be reformed under the Digital and Content Team as shown above. A more likely organization as a first step towards Revenue Marketing is shown below.

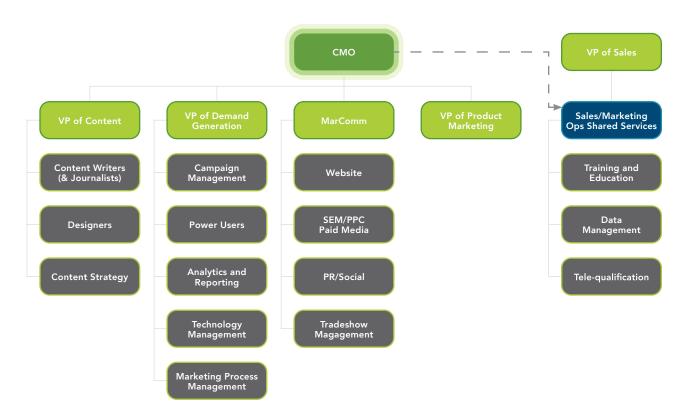


Figure 5. Best First Step Revenue Marketing Organization

In this "Best First Step" model (Figure 5.), we assume that the existing teams remain where they are, including content, creative, Marketing Operations and MarComm (website, PR and social media) teams. In addition, many of the functions that have historically been the responsibility of sales ops (data management and tele-qualification, for example) stay under the umbrella of sales, but now have a dotted line accountability to the CMO. Adding Revenue Marketing means taking any existing email marketing team and expanding their role and refocusing them on creating revenue. In particular, they will need some creative services of their own to deal with forms, html emails, landing pages, microsites, etc. They will need campaign managers, marketing automation power users and business analysts.

Key Takeaways

Marketing has gone through some tremendous changes in the past 25 years. New media have reshaped the buying process, which requires us to reshape the selling and marketing processes. Successful sellers are learning how to interact with prospects earlier in the buying cycle by offering relevant information.

Our ability to execute relevant interactions requires technology, clean data, optimized processes and constant feedback from prior interactions. As a result of changing how we interact with prospects, firms recognize increased revenues and gain the ability to measure the marketing influence on sales results. Revenue Marketing is born.

Adapting marketing organizations to become Revenue Marketers is a multi-year journey that requires changes to technology, data, processes, people, strategies and measurement systems. In the marketing roadmap that guides these changes, the people dimension requires a focus on training, adoption, compensation and organizational structure.

Marketing organizations will be well served in building a Revenue Marketing Center of Excellence (RMCoE) whose sole focus is on creating and retaining customers and primary metrics are contribution to pipeline and revenue.

The RMCoE has the expertise to leverage the new media and technologies, engage customers and prospects in a meaningful and relevant way, drive the process and data changes, adapt to the ever-changing buying cycle, and finally bridge the gap with sales by becoming jointly responsible for hitting revenue targets.

The Three Divisions of the Revenue Marketing COE

In an idealized Revenue Marketing Center of Excellence, one might divide the functions into three groups, each lead by a director or VP, all of which report into the CMO.

- 1. Demand Generation Group
- 2. Digital and Content Team
- 3. Marketing Operations Group

The RMCoE is led by a VP of Revenue Marketing and reports into a CMO or EVP Marketing, or EVP of Marketing and Sales. The VP of Revenue Marketing is responsible for the ever-evolving impact marketing makes on revenue, best practices optimization and the building of proper alignment among executive stakeholders in the company.

The division of functions between Marketing Operations and Demand Generation is very clear in some cases and less clear in others. The guiding principal for determining where a team should live is based on whether they offer a service that is more infrastructural and supportive, or more day-to-day customer and prospect engagement related. Technology, data management, process and reporting/analytics are more infrastructure and support related rather than day-to-day engagement-program related, and therefore belong in Marketing Operations.



Program and Campaign Management, utilization of technology, and QA & Testing are tied to day-to-day demand generation activities – and therefore sit squarely in the Demand Generation group. Campaign Services includes the left brain, technology power users who login to a technology every day to do their



work They could be part of Operations if they also took on the technology admin functions, but if their role is primarily implementation of programs and campaigns, they are more closely tied to day-to-day Demand Generation. They are a resource used by field marketing and campaign management, and depend on the creative services team for content. These functions also interact with sales, field marketing, Digital and Content team, and Marketing Operations on a daily basis.

Marketing Operations

A charter of the Marketing Operations group should look something like this:

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

A VP/Director of Marketing Operations leads this group. In larger, multi-national corporations this function will have a centralized group that leads and controls all group operations, and people in offices around the world who have significant marketing presence.



The following is a recommended set of functions within this group:



Marketing Technology Management Group

There are now more than 3000 marketing-related technologies available, exponentially more than was available only five years ago. The Marketing Technology group is tasked with selecting the right mix of technologies to make a marketing department more effective and efficient and to help it do things that were not possible some years ago. They must stay abreast of the latest technology, understand how each piece might fit into their architecture and make decisions that safely chart a productive path into the future. On a reactive basis, this group may serve to support user provisioning and technical support escalation, and perform integrations.



This group is intimate with the business needs of Revenue Marketing, and uses this knowledge to provide technology and services to marketing to make them more productive. They leverage resources in IT, outside agencies and vendors for implementation of most of the solutions. The reason this group exists outside of IT is because they need to be close to the business requirements and they need to marry the work of agencies with their marketing teams.

Typical Roles/Competencies for Marketing Technology Management Group

- Defines the business requirements for marketing technology and service providers – business analyst
- Selects and engages new agency and vendor resources including SaaS providers
- Creates and maintains a Revenue Marketing Technology roadmap, and completes release management with contingency planning and risk assessment
- Interfaces with IT, vendors, Sales Ops and the CRM team
- Governs systems SLAs, QoS, security, administration, problem resolution
- Provides related technology and service training and adoption
- Acts as a CRM Administrator, perhaps as a backup to the Sales Ops CRM Administrator
- IS administrator for all applications rolled out for marketing, including MRM, MAP, CMS, search tools, databases, MDM, DAM, BI tools, e-commerce tools, website hosting services, collaboration tools
- Customizes products or services
- Integrates data between disparate marketing systems and other data repositories

Data Management

If the data master is the CRM system, and the marketing automation system syncs to this system, it is probable that the ownership of the data is in Sales Operations. In the event that this role does not exist, and there is an opportunity to add it in the Marketing Operations group.

Data quality can decline in many ways. Data naturally loses accuracy over time (decay), it becomes corrupted (loss of integrity), duplicates can be created (loss of cleanliness), and new data can be added that is simply wrong (loss of accuracy and lack of completeness). If marketing invests \$100 for each



new lead, then a 100,000 record database is an asset worth \$10m. Marketing Sherpa's research shows that B2B data decays at a rate of 2.1% per month. This is an annualized rate of 22.5%. In short, the potential negative impact outweighs the effort necessary to keep your data clean. The success of marketing campaigns is dependent primarily on the quality of the data.

Roles of the Data Management Team

- **Prevention:** Maintains data quality through rigorous data analysis, standards definition and adherence, data hygiene (contact management, health of customer database)
- Detection and Remediation: Creates and runs reports to identify quality issues, and remediates
- Data integrations (field mapping, data flows), especially CRM
- Data segmentation (list management)
- Centralized governance on contact management, and data appending
 - Drives data quality rules, procedures, new processes and the standards for normalization of data entered into the system
- Reporting: Manages reporting on data quality metrics
- Training: Best practices in entering new data

If the role of data czar exists in Sales Operations, marketing will still need to ensure that their requirements are met to ensure campaign success:

- Accurate first and last names for all leads and contacts
- Accurate and up to date lead and contact owners for the times where the 'Email From' address will be the owner
- Accurate segmentation data so that dynamic content and targeted lists are accurate
- Clear differentiation between customers, prospects, employees, partners, vendors, investors, media, competitors, etc. so campaigns can be targeted better
- No duplicates and up to date contact and lead status

Marketing Process Management

This group is responsible for ensuring that the processes that control and direct marketing activities are optimized for efficiency and productivity. Lead Management, Funnel Management, Service Level Agreements with Sales, Campaign Development (both Inbound and Outbound), QA, Content development, and reporting are all important areas rich in process. Marketing needs a focus on process in order to become scalable, repeatable and predictable in the results achieved. Processes are rarely static, they break as an organization grows and will need to be reengineered as the technology environment and organization evolves. Process quality can be measured, and ineffective processes detected and replaced. A focus on developing and maintaining effective processes is a key element in Revenue Marketing. This team may also be a place to locate certified Project Managers who would direct large marketing initiatives, marketing technology releases, etc.

This team is responsible for:

- Innovating new marketing processes and redefining old ones
- Measuring the efficacy of current processes
- Managing projects for major marketing initiatives
- Directing change management function
- Process training and documentation

This group would help create and maintain:

- Lead Management process
- Data processes
- Campaign project management
- Program planning and alignment with sales
- Processes governing integration between systems e.g., MA and CRM, MRM and CMS
- Processes and workflows around asset creation and website updates
- CAN SPAM and related regulations
- New marketing technology and services rollouts, globally
- SLAs and integration of sales processes with marketing processes

Reporting and Analytics

This group is responsible for the in-depth reporting on marketing activities and attribution to revenue. This is a good place to centralize all of the marketing analytics and business analysis. As a result, this group is often best positioned to help on budgets and provide data for planning efforts. Some of the reporting and analysis that this group can provide includes:

- Web analytics
- Campaign analytics
- Historical results, current activity measurements and results projection
 - Dashboards
 - Lead waterfall/funnel reporting and analysis
 - Analysis, interpretation and recommendations based on results
 - A/B testing methods to hone results
 - Weekly, Monthly, Quarterly and Annual reports to multiple levels of management
- Marketing ROI measurement, reporting and accountability
- Investment assignment to revenue projections to guide decision making
- Marketing/CRM data analysis
- Business intelligence systems users



Business Analyst

A business analyst could live in this group or in the Campaign Management group. Everything in an automated marketing campaign must be weighed, measured and constantly reviewed. Because what you measure changes over time, the Business Analyst will continuously analyze the data. The Business Analyst should be the person on your team dedicated to assessing the impact of each campaign on your bottom line. This person should be analytical with exceptional communication skills. Because the Business Analyst is responsible for analyzing the numbers and reporting back to the team, technical experience and the ability to make suggestions for change are essential. In smaller organizations, the roles of the Data Analyst and the Business Analyst may be merged into a single position.

Vendor Management

There are an increasing number of SaaS solutions that require constant vendor interaction, contract negotiation, provisioning, governance and billing management. In some cases these responsibilities are handed off to IT or Purchasing, but to fully represent the business requirements of marketing, firms may elect to manage vendors and agencies inside marketing directly. Where this function remains within marketing, it's recommended that



they follow the same standards as IT or Purchasing would have set for the organization's broader set of technology vendors. Examples of vendor relationships retained within marketing include: Google, Wordstream, Ion Interactive, Spyvu, Marketo, Eloqua, ExactTarget, Hubspot, Jive, Wordpress, Birst, Kapost, Compendium, Domo, GoodData, Tableau, Social platforms, and so on.

Functions of this team include:

- Developing a standardized vendor performance scorecard
- Managing relationships with all marketing vendors
- Conducting quarterly business reviews with vendors to ensure objectives are being met
- Negotiating contracts with marketing vendors
- Conducting due diligence within the marketing team to ensure that the vendors, products or services are being fully utilized/optimized
- Providing marketing insight into new technologies that can fit within the organization architecture and provide productivity- or innovation-related benefits to marketing.

Training and Education

Currently marketing is undergoing a high rate of change, which requires frequent training and certifications for individuals connected to the many new technologies that are available. To keep the team current, a firm will need to focus on on-going education on Marketing Automation, CRM, DMP, mobile, search, social, campaign management best practices, data management, content tools, content operations, and so on. This ongoing education is best managed from within marketing by an education facilitator.



This function is very often outsourced to a consultant or coach.

Global Field Marketing Operations Liaison

This group (or individual) is the link between Marketing Operations at corporate and the many field offices.

This person will assist with:

- Global technology/service rollouts and adoption
- Global process change rollouts and soliciting input from field marketing
- Global data issues, particularly when certain locations are accelerating data decay
- Unique field marketing requirements for reporting



This person is the HQ-based voice of the field marketing team. They are the advocate for the needs of the field-marketing people and communicate back what those teams need to know to be prepared for upcoming changes.

Key Takeaways

Marketing Operations is central to an effective, aligned Revenue Marketing organization. It helps organizations provide a transparent, efficient and accountable view of marketing. Effective Marketing Ops services can also increase marketing efficiency and organizational agility.

The benefits of an effective Marketing Ops organization also include:

- Improved effectiveness by collecting and managing best practices
- Shared performance data and process efficiencies to benefit multiple teams
- Improved performance through shared expertise on technology, process and customer engagement
- Skilled in measurement, reporting and analysis of data that leads to repeatable results
- Identified baselines and established goals for operational performance
- Standardized global marketing processes resulting in consistency and higher quality
- Owned and managed data governance, maintenance, quality and integrity

The functions provided by Marketing Ops are infrastructural and supportive, and vital to maintaining the effectiveness of marketing.



The Demand Generation Group

The leader of the Demand Generation group, is either a director or a VP of Revenue Marketing. When one considers the components that comprise any Center of Excellence, a few core items are found here in the Demand Generation group:

- Best Practices Management and established standards
- Shared services delivery and creation of templates for a wider audience
- Reports against goals and tight integration to the field and sales

Program and campaign management, utilization of MAP and CRM technology, and QA and testing are part of the basic daily Demand Generation activities - and therefore sit squarely in the Demand Generation group. On occasion, usually in larger organizations, a team called Marketing Campaign Services, which includes the technology Power Users, is placed in Marketing Operations instead of the Demand Generation group. In this context they are a resource used by Field Marketing, program and Campaign Managers. In this whitepaper we assume that they are part of the Demand Generation group as described below.

Demand Generation Group

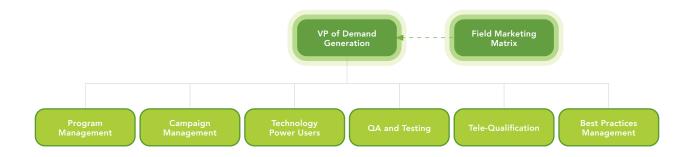
The charter of the Demand Generation group should look something like this:

Drive more qualified leads and contacts into sales channels to achieve targeted and forecasted revenue goals and ROI. Increase the velocity of the sales funnel and deliver great prospect and customer experiences with the brand.

Or

Responsible for driving up revenue results and optimizing interactions with all global buyers across the revenue cycle to accelerate predictable revenue growth.

The VP/Director of Revenue Marketing manages the lead funnel and must be able to envision effective programs and campaigns to the target markets. They must have a deep understanding of their market, their buyers and how to read prospects' digital body language. They must understand the processes that drive marketing and sales, and underpin the sales and marketing relationship. They must be data and results driven.

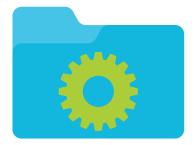


The following is a recommended set of functions within this group:



Program Management

Program Management is responsible for ensuring that all marketing investments are aligned to the over-arching business strategy. This team envisions and ensures a revenue result from programs and campaigns for their responsible areas. The team is also responsible for creating a program architecture, ensuring that all tactics are tied to a core theme that supports a desired business outcome. This team works with the Digital and Content team to plan a content strategy and roadmap that supports the program



strategy for the quarter, year, etc. This function includes aspects of sales empowerment, including enabling sales reps to see and take advantage of marketing interactions with their customers and prospects. Program Management is data obsessed, measuring and monitoring success and failures of all programs deployed. Program Management should be only one person – or is a function that is fulfilled by the VP or Director of Demand Generation – when first making a structural shift.

Typical Roles/Competencies for Program Managers

- Aligns program strategy to business strategy and sales objectives
- Designs program architecture to account for all marketing tactics
- Carries a revenue target cascaded down from the Director/VP of Demand Generation
- Focuses on tactics that produce revenue
- Obsesses about data and is highly analytical it may be advantageous in larger organizations to have a dedicated data/business analyst. This person analyzes prospect behavior and advocates the hottest segments to be segmented with specific offers. They also analyze results and make recommendations for program changes.

Campaign Management

The people in this group are Campaign Managers, responsible for one or more media. This role takes direction from either Program Management or the Director of Demand Generation, receives analytics from the business analyst, learns best practices, takes input from the content and creative teams, and gathers knowledge from the Power User to ultimately design the most effective campaigns. Campaign Managers are obsessed with creating an intimate digital dialog at all phases of the buying cycle and providing qualified leads to the sales team. This role focuses on the long-term digital relationship with prospects and customers and must effectively lead all team members to pull campaigns together.



It is likely that the average firm will require multiple Campaign Managers, with specialization in different campaign types and lead acquisition channels. One possible organization, if they were all to live in one group, is as follows:

- New Lead Acquisition and Nurturing
 - Omni-Channel (Inbound and Outbound) Marketing Campaign Design
 - Includes organic search and paid traffic
 - Social Demand Generation
 - Content syndication
 - Email channel campaigns, evergreen nurturing campaigns, newsletters
 - Website lead capture and conversion
 - Direct Mail programs
 - Trade shows, exhibits, and events
- Customer Nurturing and ABM
 - Omni-channel Cross-sell and up-sell campaigns
 - Renewal and customer lifetime value management
 - Migration
- Channel Enablement provides channel team best practices, campaigns, etc.
- Digital Reputation (Brand Awareness and Brand Loyalty) team
 - Includes Website (other than lead capture), social media, PR, etc.

On a daily basis, the task of creating and managing campaigns will cause the Campaign Managers to draw on the skills and resources of the Digital and Content group, business analysts, Power Users, and in a mature state, the Best Practices group.

To make this truly effective, one could allocate budget only to the Program Management group and empower them to allocate budget to each of the Campaign Managers that they draw on to create and execute campaigns. In turn, the Campaign Managers would fund the Digital and Content group to ensure that the assets required for effective Demand Generation are determined by the people who have a revenue and pipeline goal to meet.

Everything in an automated marketing campaign must be weighed, measured and constantly reviewed. As such, enterprise organizations are best to include a business analyst either in this group (of Campaign Management) or in the reporting and analytics group (Marketing Operations subset in a more mature organization). The role of the business analyst is the person on the team dedicated to assessing the impact of each campaign on your bottom line. This person should be analytical with exceptional communication skills. Because the business analyst is responsible for analyzing the numbers and reporting back to the team. Prior technical experience and the ability to make suggestions for change are a must – meaning he or she is an expert in Demand Generation best practices. Their output extends from defining segments for new programs and campaigns to providing recommendations associated with reported results.

Typical Roles/Competencies for a Campaign Manager

- Lead campaign design and execution (development is done by Power Users)
- Ensure campaign best practices are leveraged
- Quarterback campaigns
- Is point of contact with business owner for campaigns
- Establish campaign business rules
- Authorize and sign off on campaigns
- Deliver revenue and pipeline through campaigns and prove the marketing ROI

Technology Power Users

The campaign services and Power Users team consists of specialists who have the skills and expertise to operate the various technologies used to build and run campaigns. The people on this team are shared across business units and regions of the globe, and between the Campaign Managers. The people in campaign services take direction from the Campaign Managers. This team sets up and executes campaigns/programs in marketing automation systems and email programs. If they also take on administration of the systems and manage provisioning of new users, training and introduction of new releases, a case can be made for moving some or all of this team into Marketing Operations.



The Marketing Automation Platform (MAP) and/or Email Service Provider (ESP) Power Users are well trained and certified in the systems they use. They will be deeply familiar with the technology and how it functions and able to use the features of the platform to suit your needs. It should be noted that these are often, quite simply, well-trained users of a software platform and not necessarily senior level technologists.

Many are also well trained in the various other platforms that integrate with the MAP system, such as CRM, DMP and other platforms. This deep but holistic view of technology can be very useful when it comes to enriching the customer-lifecycle experience of the brand. The Power Users are expected to know and leverage best practices in building and launching campaigns, designing campaigns for effective reporting, creating email and landing page templates, creating workflows to modify data, doing multivariate testing in campaigns and flawless targeting of contacts in the database. They are not expected to design the campaigns. The above mentioned campaign strategist does that.

It is typically recommended that at least one marketing team staff member become a trained Power User of the core MAP and/or ESP in use, even where the services to support them are outsourced. Although not recommended, it should also be noted that in some organizations, Power Users sit within the IT department. This is not typically recommended, because Power Users of Marketing Automation Platforms do not require IT-level technology skills. In those organizations where this is the case, it's also recommended that at least one marketing team member have Power User skills.

Some organizations consider their MAP to be an outbound system (largely leveraging the email channel), where in fact the MAP is also vital to supporting inbound campaigns with landing pages, forms, thank you pages and campaigns that capture UTM codes. It also provides inbound campaign reporting in the CRM. As such, it is important that MAP Power Users understand the basics of organic search and paid traffic campaigns, and what they need to configure in templates and landing pages to support and QA those types of campaigns.

Typical Competencies for Power Users (Campaign Services)

- Marketing Automation
- Marketing Resource Management
- Organic Search
- Paid Traffic
- Paid Media Planning
- Content Management Systems
- Social Media Management Tools
- Reporting
- HTML Emails / Landing Pages
- Form manipulations

Quality Assurance and Testing Group

Quality Assurance is broken out as a separate team so that they can operate independently and remain objective. If their objectivity is paramount, this team could be moved into Operations, but since they operate on more daily tactical tasks, such as campaigns and collateral, they fit the charter of the Demand Generation group better. This team has to have the skills to accept and interpret functional-requirement documents and then match those requirements to QA campaign, website and collateral-related products.



Typical Roles/Competencies for Quality Assurance and Testing

- Create quality reports and making recommendations for people/process improvement
- Detect and escalate quality problems
- Inspect, review and approve programs, campaigns and documents to ensure they are flawless
 - Review html, target lists, selected offers, links, launch dates, boiler plates, etc.
 - Ensure correct templates and lists are used
- Complete visual and copy QA (may be a different QA person than the technical MAP QA)
- Inspect, review and approve processes to ensure they are optimized
- Establish and enforce quality standards for collateral, campaigns and processes
- Ensure documents and campaigns adhere to health, safety or financial regulations before sending to a compliance department for final signoff.
- Educate marketing departments regarding the specific quality requirements
- Ensure a flawless customer experience
- Suggest and create potential tests to create lift in customer engagement
- Educate marketing team on which tests prevail and make recommendations on how best to proceed for maximum engagement

It is advisable to designate different individuals to QA programs and campaigns than the Power Users who actually built the campaigns. Typically the campaign strategists who design the campaigns are not well versed in the technology and not positioned to do technical QA of a campaign. The campaign strategists should, of course, QA the look and feel of a campaign, the reporting and content. Individuals with equal or greater experience to the campaign builder typically do the technical QA for programs and campaigns. These could be Power Users from other teams or who were not involved in the particular project build. Additionally, it should be mentioned that each organization should define a well-documented QA process for these individuals to follow. There are some QA specialists who are expert at following test scripts, whilst others are adept at going off script, doing the unexpected and breaking things! You need both types of QA.

Tele-Qualification

It is becoming more common to find a lead qualification group in marketing. They go under various names, telemarketing, lead development, inside sales representatives and so on. In some cases, where they are encouraged to also sell lower-priced services and products, they belong more in sales than in marketing. But in cases where their role is to simply cultivate prospects, qualifying them before passing the lead to sales, it is valuable to keep them in marketing. It further connects the Revenue Marketing team to their ultimate deliverable to sales – warm qualified leads and an accelerated funnel.



For this team to be successful it is vital to set up a defined and documented lead management process, with clear quality rules, hand-offs and Service Level Agreements. Measuring the number of calls they make per hour is a trivial exercise in measuring activity. The real measure of results is number of Sales Accepted Leads (SAL) and Sales Qualified Leads (SQLs) that they generate per month from both leads and contacts in your CRM. Their goals should be based on SALs and SQLs, which are qualified passed to sales minus leads rejected by sales and also newly re-qualified contacts being offered back up to sales as ready to re-engage.

Typical Roles/Competencies for Tele-Qualification

- Participate in multi-channel campaigns that require a human interaction
- Handle Live Person/Live Chat support (sales, not support related)
- Assist buyers in the buying cycle with no sales pressure as a prospect concierge service
- Elicit BANT criteria from leads in the funnel
- Elicit prospect characteristics to narrow them to a specific persona (for better marketing)
- Work with previously qualified contacts, or customers, who are back in nurturing to requalify them
- Opt in leads and contacts who are not ready to engage with sales into one of many defined nurturing tracks

Best Practices Management

It is a requirement to centralize their earned intellectual capital, seek out and assimilate the wisdom from outside, and disseminate this combined wealth to the entire organization for every organization that seeks to learn, grow and continuously improve their performance.

Typical Roles/Competencies for Best Practices Specialist

- Gather, publish and train on information regarding
 which techniques and practices yield the best results in
 areas including: email, landing pages, forms, direct mail,
 data imports, reporting, dashboards, omni-channel campaigns, nurturing, lead management
 processes, lead qualification, website design, content, media and data management
- Ensure adoption of best practices by regular inspection of activities
- Oversee campaigns to ensure best practices are used
- Document and present findings in person and on an intranet
- Research industry best practices in the areas mentioned above
- Define SLAs between marketing and sales, and between teams inside Revenue Marketing
- Define common Demand Generation language and terms
- Obsess over prospect and customer experience
- Create and manage play books and templates for marketing activities, such as campaign creation or data imports
- Serve as a global Demand Generation liaison in the event that the Global Field Marketing team are not part of the Demand Generation team

Only in the largest organizations do we see a need for this function to be a full-time resource. The important factor is that this function has an owner and often that can be an individual who also has another marketing role. It may be tempting to allow this role to be filled by the practitioners in each of the disciplines, but the usual outcome from this is that the daily urgent tasks will supersede this important task with the result that it will be relegated to an afterthought.

Global Field Marketing

Often the Global Field Marketing team reports into the country or regional manager/VP. They are also matrixed into marketing back at HQ. Global marketing teams serve multiple roles:

- Gather customer requirements for their region to be sent back to product marketing
- 2. Localize marketing messaging and collateral to better fit their region's needs
- 3. Build and maintain relationships with local channel partners and direct sales
- 4. Handle Demand Generation in their region for local direct sales and channel partners





In the case of #4 it will be beneficial for Field Marketing to be connected, at a matrix level, into the Revenue Marketing team. By connecting them into this organization, they will be able to more easily:

- Influence the content and offers that are produced
- Duplicate marketing campaigns that are launched in other regions
- Consume and share best practices
- Leverage the centralized creative services, centralized QA, Campaign Services, Power Users, and Reporting and Analytics groups
- Add their voice to that of HQ based Campaign Managers to lobby for change with the technology group, the Data Management group, process optimization group and the Reporting and Analytics group.

The question arises, for multinationals, how much of the campaign design and development should you execute in a centralized fashion, as a service to your Field Marketing group, and how much should you decentralize and empower the field to launch their own Demand Generation campaigns. There are pros and cons to both sides and the best answer usually hinges on the experience of the teams involved and the state of readiness to take on driving campaigns in a consistent manner across the organization. If your organization is in its infancy in moving to modern marketing and building advanced omni-channel nurturing campaigns, it will behoove you to centralize the campaign design and build and offer it as a service to the field for the first year or two. Then gradually decentralize some of the design and build as the skill level and adherence to established best practices increases.

Campaign Project Management (PM)

The design, development, QA, launch and reporting of omnichannel campaigns requires a trained Campaign Project Manager. This person will have skills and experience related to executing campaigns and leveraging MAPs and assets. In some organizations, the PM function may be centralized under Marketing Operations, but it is likely the campaign PM will be more successful if they are not a shared resource. (I.e. they are dedicated to working with the same team, defining and building campaigns day after day.) Do not underestimate the degree of specialization required of these PMs. They must become familiar with inbound and outbound campaigns, the requirements for both, QA and blueprints. They must also handle reporting and engage with asset traffic managers.

Key Takeaways

Marketing has gone through tremendous changes in the past 25 years. New media have reshaped the buying process, which requires us to reshape the selling and marketing processes. Successful sellers are learning how to interact with prospects earlier in the buying cycle by offering relevant information.

Our ability to execute relevant interactions requires technology, clean data, optimized processes and constant feedback from prior interactions. As a result of changing how we interact with prospects, firms recognize increased revenues and gain the ability to measure the marketing influence on sales results. Revenue Marketing is born.

Adapting marketing organizations to become Revenue Marketers is a multi-year journey that requires changes to technology, data, processes, people, strategies and measurement systems. In the marketing roadmap that guides these changes, the people dimension requires a focus on training, adoption, compensation and organizational structure.

Marketing organizations will be well served in building a Revenue Marketing Center of Excellence (RMCoE) whose sole focus in on creating and retaining customers, and whose primary metrics are contribution to pipeline and revenue.

The RMCoE has the expertise to leverage the new media and technologies, to engage customers and prospects in a meaningful and relevant way, to drive the process and data changes, to adapt to the every changing buying cycle, and to finally bridge the gap with sales by becoming jointly responsible for hitting revenue targets.

The Demand Generation group is responsible for creating omni-channel campaigns that deliver great customer experiences with your brand, attract, acquire, nurture, and accelerate these prospects into and through your funnel so that marketing can demonstrate great influence on the pipeline and revenue.



The Design and Content Group

The Digital and Content group is the source of the fuel for the marketing Demand Generation engine. Put simply, there would be no marketing engagement with prospects and customers if there wasn't content and assets to engage with. The Digital and Content team is one step back from interacting with the field and get their direction from the Demand Generation team and the program/campaign managers.

Because of historical silos built around the website and the "Digital team," it will probably be difficult to extract the organic search and paid traffic gurus (or agency relationships) from the Digital team that builds the website. The shift toward building omni-channel campaigns will force the inbound lead acquisition team closer to the outbound experts (in the Demand Generation group) and, in mature organizations, the inbound team ultimately merges with the outbound team within the Demand Generation group to become an omni-channel campaign team.

Digital and Content Team

The charter for the Digital and Content team should look something like this:

Create compelling content to drive higher customer and prospect engagement resulting in more qualified leads for Sales. In addition, we will create a fluid customer experience, whether it is through inbound or outbound communications, to create one company feel.

A VP/Director of Digital and Content leads this group. He/she works in parallel to the VP/Director of Revenue Marketing who leads the Demand Generation group. The leader of this group manages the website, SEO/SEM, paid traffic experts, social experts, writers, journalists, traffic managers and creative designers. They must have a deep understanding of their market, their buyers and how to read prospects' digital body language. They must have a passion for understanding what types of content work best for different audiences and through what media. They must be data and results driven.

A typical Digital and Content group, which supports the Demand Generation group, would comprise the following roles:



It may seem odd at first to put both Content and Digital into the same team. Indeed, SEM/PPC and social activities are largely Demand Generation activities, so why wouldn't these team members report into the Demand Generation group. Historically, the Digital group managed the website and search, and recently added social. Newer organizations might split apart Content and Digital and move the latter to Demand Generation while retaining the website production, but older organizations are likely to view the website as largely content related, keep it attached to the creative services team and keep the search/PPC too. Keeping the search/PPC and social team members in this group can work if they form a tight relationship with the campaign strategists and power users in the Demand Generation group.

The following is a recommended set of roles within this group:



Website Developer and Producer

The Website Producer is responsible for the construction, maintenance and performance of the website. The website serves an awareness, acquisition, nurturing (content serving), loyalty, advocacy, and, perhaps even, a business-transaction function. As such the Website Producers should be measured on the effectiveness of their digital properties to perform each of these functions within the customer life cycle.

In organizations where the website production is well integrated with marketing the website typically performs better as an awareness and conversion engine. In organizations where there is an isolated Web Development and Production team not owned by marketing, we typically see a large disconnect in the customer experience across platforms. The integration of the Website Producer into the Digital and Content group assures a cohesive customer experience across all marketing and sales touchpoints.

Typical Roles/Competencies for a Website Developer

- Code in HTML 5 and Javascript and develop a website
- Understand Marketing Automation Platforms (MAPs) and how to implement code, forms, etc.
- Use Google Analytics or Adobe tools
- Understand tag management and plugins
- Understand Content Management Systems (CMS) such as Wordpress

Organic Search and Paid Traffic Expert

The inbound marketing role includes experts in paid digital media, organic and paid search, PPC, content syndication and social media. In many cases these individuals will need to work closely with the power users in the Demand Generation group in order to leverage landing pages and automated tracking of respondents. If the two teams are well integrated in this respect the result is that media spend on digital acquisition and nurturing can be directly related to pipeline and revenue. This team owns paid media purchasing and execution. They handle all search, display, mobile, social advertising and any other programmatic media purchasing. As mentioned above, where possible particularly in newer organizations, this function may exist under the Demand Generation group.

Typical Roles/Competencies for a Organic Search and Paid Traffic Expert

- Comprehend and exercise inbound marketing best practices
- Understand content marketing
- Plan media where to spend media budget to acquire the best mix of leads
- Develop Demand Generation strategies and campaigns that underpin client revenue goals
- Understand the mechanisms for linking inbound activities and data into marketing automation and CRM platforms
- Strategize and design inbound marketing programs that align with business and operational needs and processes

Typical Roles/Competencies for a Organic Search and Paid Traffic Expert

- Guide Demand Gen teams in related campaign development in MAP systems (landing pages and forms), and CRM and configure those technologies to meet the business and campaign needs.
- Have expertise in inbound-related technologies and channels such as tag management, Bing, Google AdSense, Facebook, LinkedIn, etc.
- Interpret results, build and execute tests, and continuously adapt campaigns

Content Writers and Journalists

This team provides and manages resources for copywriting for all content and assets utilized in digital marketing. Often times an outsourced function, Writers often specialize in web, collateral or email copy; the styles are different and fine tuned to be effective in the chosen medium. One of the trends emerging right now is to hire Journalists to write on your behalf. This is largely driven by the 'instant gratification' audience, seeking content through media like Twitter and Snapchat where content is pushed in short bursts to engage the audience in real time. Success of this team is measured



through content consumption in inbound/outbound campaigns, social sharing and website engagement.

Typical Roles/Competencies for Content Writers:

- SEO expertise for website and blog writers
- Demand generation best practices for outbound emails, landing pages, and assets
- Rapid response writers who can write and push content in real time
- Understands personas and buying journey driven content

Traffic Managers, Coordinators and Campaign Project Managers

Coordinating the collection of content requirements from sales, field marketing, product marketing and Demand Generation, and coordinating the myriad of vendors involved in creating content and assets, requires organizational skills. Typically a Project Manager or a Traffic Manager is involved to ensure assets are created on budget, on time and delivered to the internal customer. Requiring Campaign Project Managers to also coordinate the creation of assets with vendors and agencies can be a stretch for some people.



Just as with outbound campaigns, inbound campaigns also need Project Management – someone to coordinate with power users and content developers, etc.

Social Media Expert

Public Relations remains an important part of driving brand awareness and brand loyalty while reinforcing brand attributes. It can even contribute to lead acquisition. However, the media used to achieve these results is changing. Much of this work is now being executed on social media. In fact some of the media, such as LinkedIn, Facebook and Twitter, enable firms to do highly targeted lead acquisition and remarketing campaigns. This is unrelated to the function of social media monitoring, sentiment analysis and reputation management.



Typical Roles/Competencies for Social Media Experts:

- Have expertise in multiple social platforms
- Understand and speak to your specific personas
- Conduct analysis to determine which social channels are best leveraged by the Demand Generation team to achieve best results
- Plan media understand how to arrive at the best allocation between all the channels to accomplish the Demand Gen goals at the best price and quality

Creative Designers

Creative Design is a shared services group utilized by campaign managers and field marketing. Their role is to provide and manage resources for photography and images, graphic design, web design and artwork development. Some of these resources may be sourced internally, some may be outsourced. This group establishes a Service Level Agreement (SLA) with the campaign managers and content planning team so that quality and timeliness of deliverables is maintained. They leverage the QA group for quality control. In some cases, work, such as copy or images, may flow from Creative Design to the campaign services team, be placed in a program and QA'd thereafter as a whole rather than as individual pieces earlier in the workflow.



Typical Roles /Competencies for Creative Services

- General .NET, Java, ASP, HTML and CSS coding (excluding campaign related Landing Pages and Email)
- Microsite design, coding
- Print design, graphic design and illustration (for Revenue Marketing)
- Production, printing and print vendor selection and relationship management for Revenue Marketing only
- Stock photo research, selection and purchase for Revenue Marketing only
- Image editing
- Copywriting and editing
- Creative direction
- Creative agency selection and management for Revenue Marketing only
- Interactive design, animation

- Flash
- Film, video and audio editing and production for Revenue Marketing
- Design for mobile vs. desktop

Most firms will continue to leverage a separate creative group for website architecture, design and development, and brand-identity-related development. Although many firms outsource their interactive designs to creative agencies it seems it is always useful to have someone on the team to do last minute, urgent design changes to a web page, infographic or email. The power users on the Demand Generation team will likely not have HTML5 skills and don't need to, for the most part. But sophisticated landing page and email templates that are responsive can require creative design with HTML5 and other advanced programming skills. The same team will layout your success stories and may even develop and manage the website.

Content Strategy

This team plans, gathers and organizes Demand Generation focused content for the company including the website and all hardcopy and digital assets. Ideally the demand for content comes from the people with revenue goals: sales people and campaign strategists. The reality for many organizations is that content takes months to develop, and someone needs to be proactively planning for what content is needed in which geography for which part of the buying cycle and which persona, addressing which business need and product or service. In some firms, content steering committees take on the role of defining the content roadmap.



The Content Strategists engage with the Demand Generation team to understand their needs for customer engagement, add in specific requirements from sales channels for selling tools and focus the content development budget on the set of content that will result in the greatest business result. Not only does this team understand personas and buying cycles, their markets and their products, this team consists of experts in determining what message is best delivered through which media.

What content is hot right now? What resonates with millennials in this market? What content needs to be retired off the website? This team actively measures the usage of all content they have produced and goals themselves on getting the most revenue influence possible from their annual content development budget. This team likely leverages a content operations platform such as Kapost or Compendium, and may also have a CMS. They provide a content roadmap and direction for the writers and interactive designers.

This team works with product marketing/MarComm to establish the correct messaging, positioning and copy for campaigns, programs and the website as it specifically relates to Revenue Marketing, not messaging in general. They may be dependent on subject matter experts from other functions in the firm, and as a result, they become expert in interviewing, researching and negotiating access to the raw content from around the company.

Typical Roles/Competencies for Content Strategist

- Serve campaign management with assets for campaigns
- Serve channels and sales teams with sales tools
- Direct creative services to write copy, landing pages, offers, sales tools and website content for Revenue Marketing
- Determine content mix, media and distribution channel, and how to re-purpose content for Revenue Marketing
- Manage, and report on, content usage effectiveness for Revenue Marketing
- Maintain an editorial calendar for Revenue Marketing
- Operate a content operations system to manage the workflows of content production and syndication through various channels.

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The Digital and Content team is where all of the content and assets that engage prospects and customers is produced. This group serves the teams that engage those audiences – sales and Demand Generation, and focuses their content budget on creating the content that will have the greatest pipeline and revenue impact.

About the Authors 35



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Debbie is a nationally recognized thought leader, innovator and speaker in Revenue Marketing with more than 30 years of experience applying strategy, technology and process to help B2B companies drive revenue growth. As a principal partner and chief strategy officer of The Pedowitz Group, Debbie is responsible for developing and managing global client relationships, as well as leading the firm's thought leadership initiatives. Debbie also earned her PhD in 2018, focusing her dissertation on how the CMO adopts financial accountability in an e-marketing environment.



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Colby Renton consults with global organizations to redefine marketing strategies for a digital consumer, drive organizational change, design Revenue Marketing processes, and optimize the modern marketing discipline overall. Previously, she worked for one of the worlds' premier HR consulting firms, where she developed her expertise in change management and global marketing strategy.



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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.

