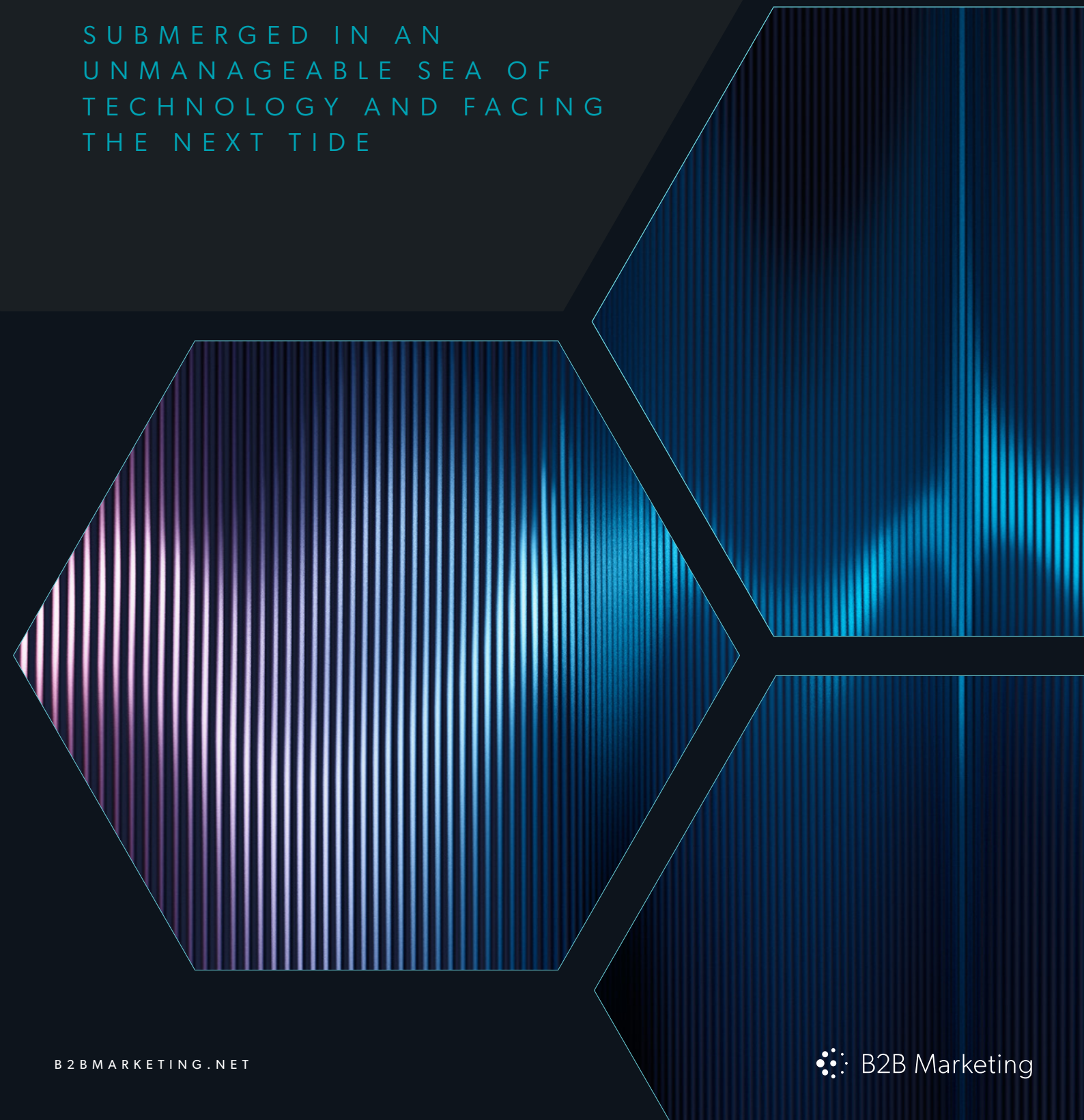
PROPOLIS

CONTENT PARTNER: GILROY

Riding the wave of martech change

SUBMERGED IN AN UNMANAGEABLE SEA OF TECHNOLOGY AND FACING THE NEXT TIDE



B2BMARKETING.NET

B2B Marketing

CONTENTS

SECTION 1
B2B marketing is digital and reliant on technology 3

SECTION 2
Overall martech satisfaction sinks further 5

SECTION 3
Martech has been critically exposed by Covid 11

SECTION 4
Opportunity knocks for marketing software vendors and service providers 13

SECTION 5
Operating martech in practice is a challenge for most 14

SECTION 6
Competency assessment framework 20

SECTION 7
Who will be the winners? 30

SECTION 8
Recommendations 32

SECTION 9
Commentary by Gilroy 33

CONTRIBUTORS

We would like to thank the following individuals who generously gave their time to help build this report:



Ian Bennison, *director of marketing operations, Intertrust Group*



Karol Gajewski, *head of digital strategy, Gilroy.*



Simon Daniels, *vice president, head of marketing operations, FD Technologies*



Gabriela Warren, *senior director of marketing (EMEA), Workiva*



Steffen Drucks, *global head of operations and data analytics, Atos*



Karla Wentworth, *founder and managing director, Vantage Clever, and Propolis Hive expert for Marketing Operations & Process*

SECTION 1

B2B marketing is digital and reliant on technology



PETER O'NEILL,
lead analyst,
B2B Marketing

How many of us have signed up for a gym membership at the start of the year, pledging to go weekly, and then only worked out a handful of times that year? Buying a gym membership may appear to be a tangible sign of progress towards fitness or good health, but it's not enough. Companies fall into a similar trap when viewing technology as a panacea: a solution or remedy for all problems. They buy the next shiny thing, but have not thought the process fully through, just as the aspiring fitness fanatic does not plan for long-term change.

In a survey I fielded globally late last year, I found that 83% of 1500 companies are now re-assessing the usefulness of their current marketing automation platform (MAP). Why? Well, because most of them are now focusing on digital marketing programmes, as society and business reacts to the Covid-19 crisis. In parallel, the focus of digital marketing is moving from the simple realisation of new business leads to a more engaging and relationship model. That raises questions about the type and functionality of MAP that is now needed.

Nearly three-quarters are using MAPs more than previously, with over half of those companies leveraging it for more products and services than before and/or for greater market coverage. But the crisis has accelerated the inevitable, and the increased dependency on digital marketing has exposed weaknesses in many MAP installations.

However, it's not just MAPs. Successful digital marketing is all about leveraging various technologies to communicate, calibrate, schedule, personalise, analyse and report success. So, while martech is recognised as critical component in enabling successful B2B marketing, the challenge of having the right martech stack is daunting. As if that wasn't enough, there's also the challenge of managing it efficiently. Some companies assign specific people or even teams to be responsible for their martech operations, while others try to operate the technologies in parallel with their day jobs. Regardless, most marketers are now realising that a radical transformation in their martech is probably necessary.

Martech has undergone a metamorphosis in the last couple of years. Digital dominates and what was innovative a few years ago is now commonplace. With nearly 9000 marketing tools and a never-ending increase in new technologies, it's easy to get distracted by shiny new toys.

Karla Wentworth, founder and managing director, Vantage Clever, and Propolis Hive expert for Marketing Operations & Process: *"Martech functionality has evolved to a point where tools used for entirely different purposes are now replicating each other's functionality in a bid to become 'the' marketing automation tool. Whilst helpful to some customers who can reduce the size of their tech stack, it is more confusing and financially wasteful for companies with a poor martech strategy, multiple tools duplicating functionality or little integration."*

1.2. B2B Marketing surveys marketers each year on their martech status

This report is based on the findings of our Q1-2022 survey of nearly 100 B2B marketers from companies of all sizes, small and large, and across all industries. The survey reveals the state of B2B's martech stack in 2022, the levels of satisfaction when it comes to those technologies, plus an overview of some of the challenges faced in operating it. When important, we also compare this year's data with the findings collected in previous years. The survey also posed several questions about the state of marketing operations (MOPs) within respondents' organisations.

For context, 32% of the survey respondents are the head of marketing in their organisation, while a further 42% are in the first line of reporting to the head of marketing. Over two-thirds of the respondents have formal responsibility for martech, and 75% claim formal responsibility for the MOPs function in their companies. However, not all of the interviewees have dedicated MOPs staff (as we will see later).

In addition to the survey, we conducted interviews with several senior marketers for a deeper dive into some of the questions. This report also provides an analysis of the 342 self-assessments already completed for the Marketing Operations & Process Competency Assessment Framework, which seeks to define the different stages of maturity when it comes to martech strategy, cross-organisational coordination, process definition and marketing operations management, and map them against different criteria required for success.

While this report will reveal some industry secrets, plenty of statistics and peer-to-peer advice, it's main aim is to ignite a conversation by providing actionable advice. It provides guidance to the organisation and process elements of managing marketing technology and processes effectively.

The advice given can help to open the debate in your company about the challenges and ambitions behind modernising your martech stack and building a modern MOPs function.

This report includes:

- The state of martech in practice.
- An industry audit of how much MOPs has been formalised.
- Advice on how to manage new marketing technology and processes effectively.

SECTION 2

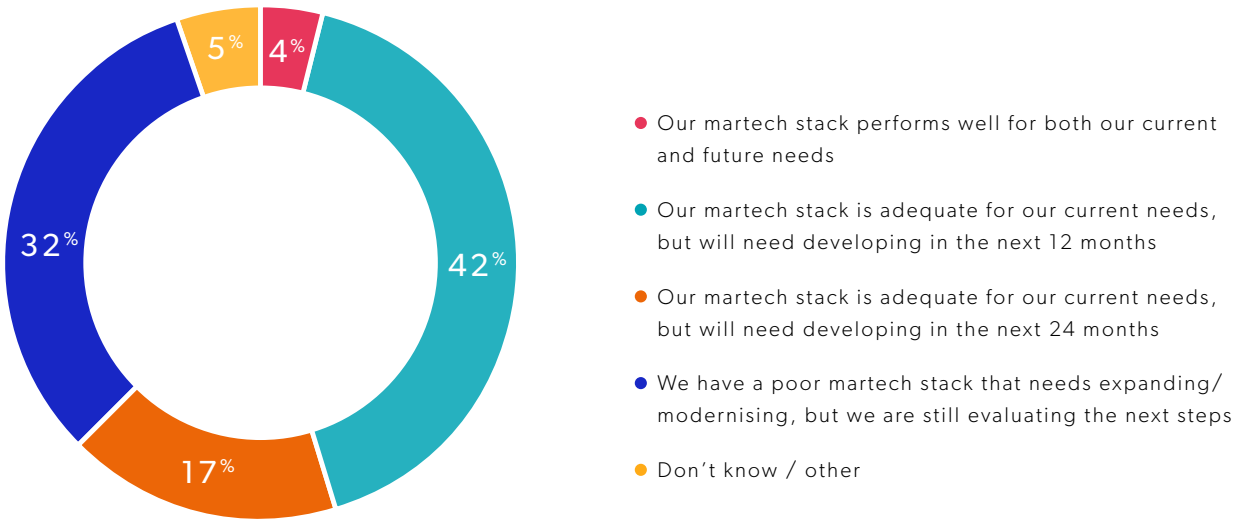
Overall martech satisfaction sinks further

Each year, our opening question gives respondents a chance to self-assess the state of their martech stack. The assessment last year was already thought-provoking: only 11% of respondents had found that their martech stack was performing well for both current and future needs. This year, the result was even lower, with just 4% providing that answer. In addition to this initial assessment, we also asked about more detailed challenges, such as functionality and integration, and asked for this detail by technology area.

2.1. Everybody has issues with some systems in their martech stack

So, marketers continue to be critical about their current martech stack, and a staggering 96% of respondents are not able to confirm that the stack is performing well for both current and future needs (compared to 89% last year). This includes the 42% (46% last year) who stated that their stack is 'adequate, but will need development in the next 12 months, and a further 17% (21% last year) anticipating changes within 24 months. 32% (14% last year) confirmed that they know they have a poor martech stack that needs expanding/modernising, but claimed they still need to consider what to do about it, leaving 5% who are not quite sure.

Which of the following best describes your organisation's current marketing technology stack?

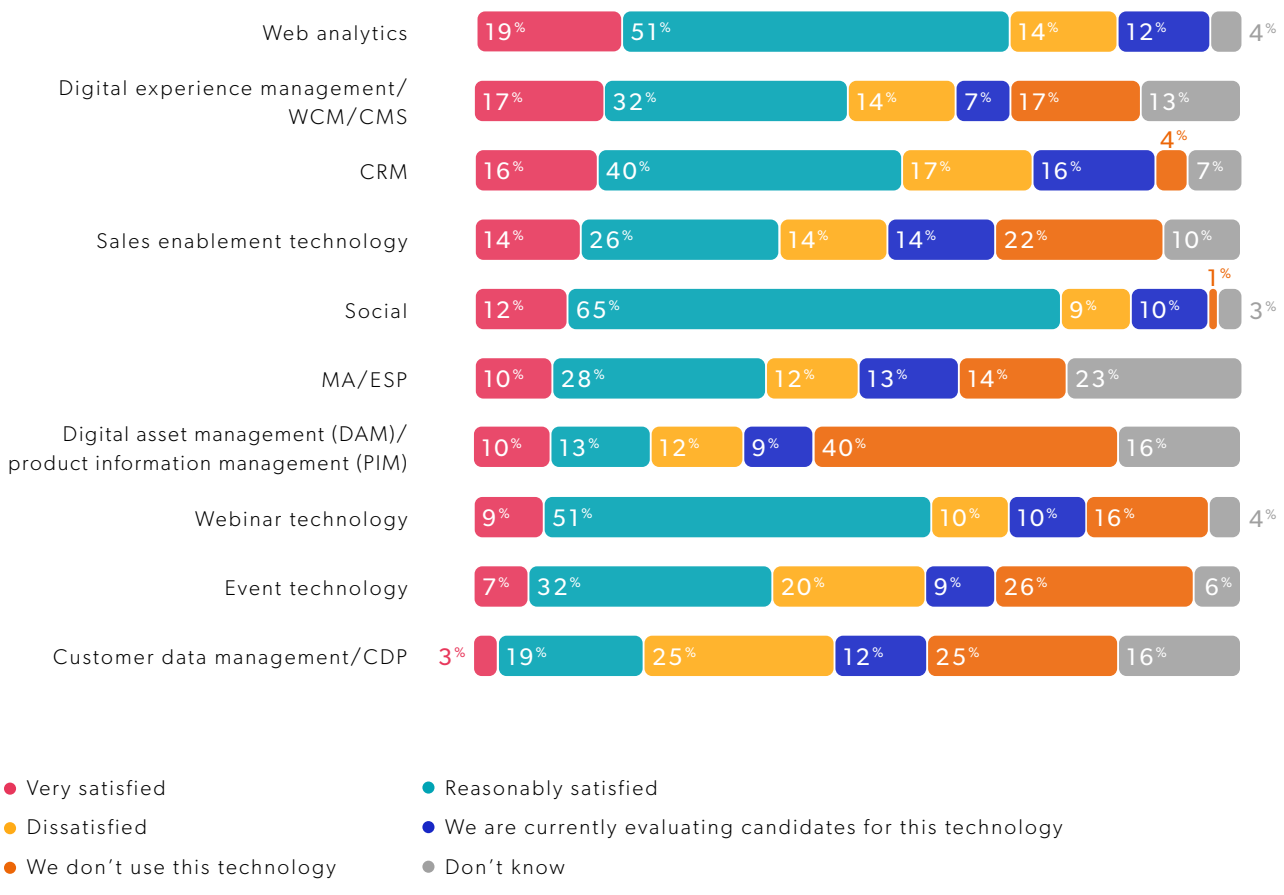


These numbers clearly demonstrate that martech is in a state of flux for most companies. Technology has advanced, but, more importantly, marketers' needs have changed.

Steffen Drucks, global head of operations and data analytics, Atos. *"Our martech stack needed a complete overhaul at this point. We've conducted a full audit to take a step back and stop arguing about individual pieces of technology. The audit provided a basis to set up a new strategy on retaining, replacing and deploying further technology."*

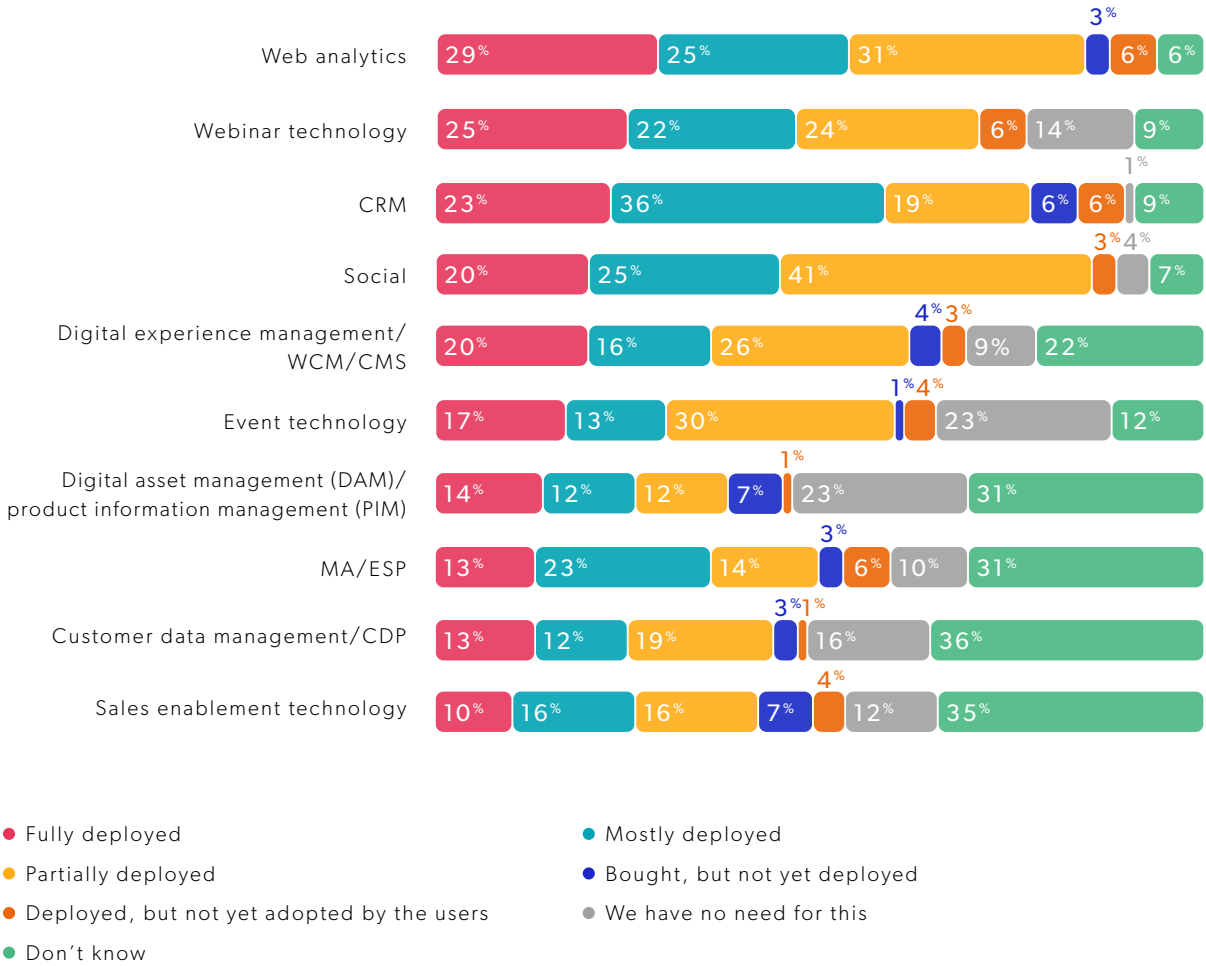
In the survey, we broke the martech stack down into 10 specific systems or platforms and asked about satisfaction within each system. Just over a half (56%) of the survey cohort reported satisfaction with their CRM platform, which is much less than last year's three-quarters. A high proportion continue to be satisfied with their web analytics (70%) and social platforms (77%). Last year, half of the respondents were satisfied with their MA or ESP platform, but this has now dropped to 38%. The lowest satisfaction numbers of all were for customer data management or customer data platforms (CDPs), with only 22% satisfied, and a further 25% explicitly not satisfied. The next-highest in being 'not satisfied' was event technologies at 20%, while just 40% were satisfied with their sales enablement system. This category also showed high buying activity, with 14% currently evaluating candidates, though CRM buying activity was higher at 16%. There is also noticeable increased buying activity for event and webinar platforms.

Overall, how satisfied are you with the various martech systems you currently deploy?



We then examined the level of adoption of the full capabilities for each of the 10 martech platforms. The recent churn in marketing campaign execution and staffing due to the pandemic has slowed down adoption progress in most companies. Only the CRM and web analytics systems were considered 'fully' or 'mostly' deployed by over half of the respondents. All other systems were marked as such by less than 50% of the executives, with the CDP and sales enablement system adoption of its full capabilities being noted by only a quarter of companies.

To what extent are the full capabilities of each martech system deployed?



- Fully deployed
- Mostly deployed
- Partially deployed
- Bought, but not yet deployed
- Deployed, but not yet adopted by the users
- We have no need for this
- Don't know

In addition to those adoption inhibitors, recent changes in digital marketing and B2B marketing interactions have effectively moved the goalposts for many martech platforms as well. So, a system that may have been 60% deployed last year, is now only 30% effective because there are new demands on it.

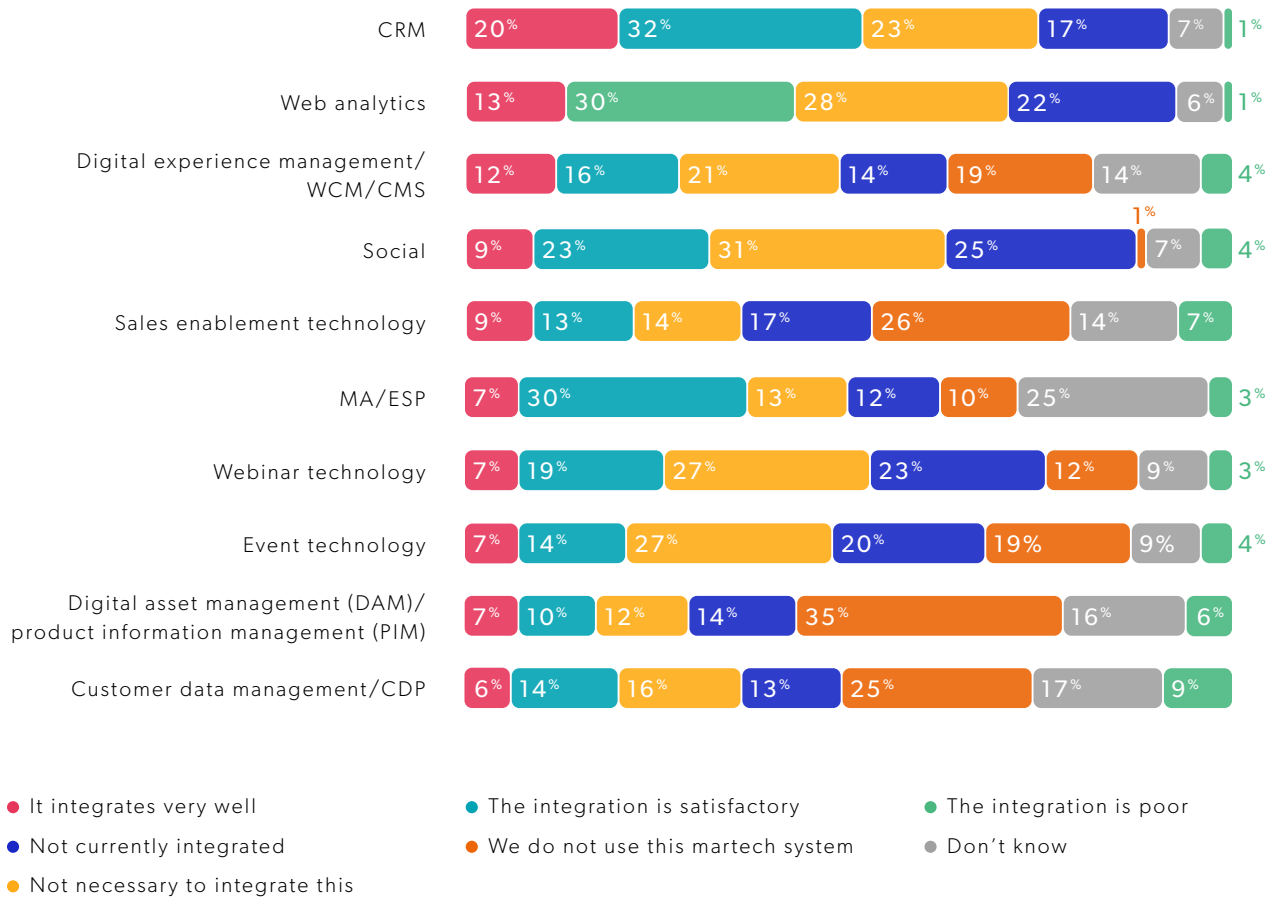
Simon Daniels, vice president, head of marketing operations, FD Technologies. *"I'd suggest that there's no such thing as fully deployed. We've had our core CRM in place for less than a year, but I reckon it's pretty well deployed, well adopted and embedded into our processes. That said, there's still plenty to do in terms of process hygiene and using the system to really drive people's activities rather than just get updated after the fact."*

2.2. Martech systems integration continues to be a challenge

We also asked about the degree of integration of the individual platforms. Integration is a strongly perceived irritant when operating technology, mostly due to the resulting data issues. Users complain about having to re-enter data, consolidate data onto a spreadsheet to do analysis, or even having to deal with data inconsistency, which causes interdepartmental conflicts.

Our survey respondents reported several issues with integration. The highest score was assigned to the CRM system, where 52% considered it adequately integrated at least. All other systems were below that number, with the worst being the CDP at 20%, and event technologies and sales enablement at 21% and 22%, respectively.

How well are each of your martech systems integrated?



The integration challenge exists regardless of how much technology is purchased from a single supplier. Even a marketing suite (or cloud) provider tends to offer various platforms that were acquired over time, and therefore not on the same technology base as the other solutions. Even if software vendors do tend to promise that their solution integrates to everything in the market, true martech due diligence must still be applied before purchasing most solutions.

Simon Daniels, vice president, head of marketing operations, FD Technologies. *"Integration is the absolute critical element. I was looking at an event management platform that supposedly integrates with our MAP, but, when I looked at it in more detail, there were so many deficiencies that it's practically useless. So, you need to dig in and really understand that."*

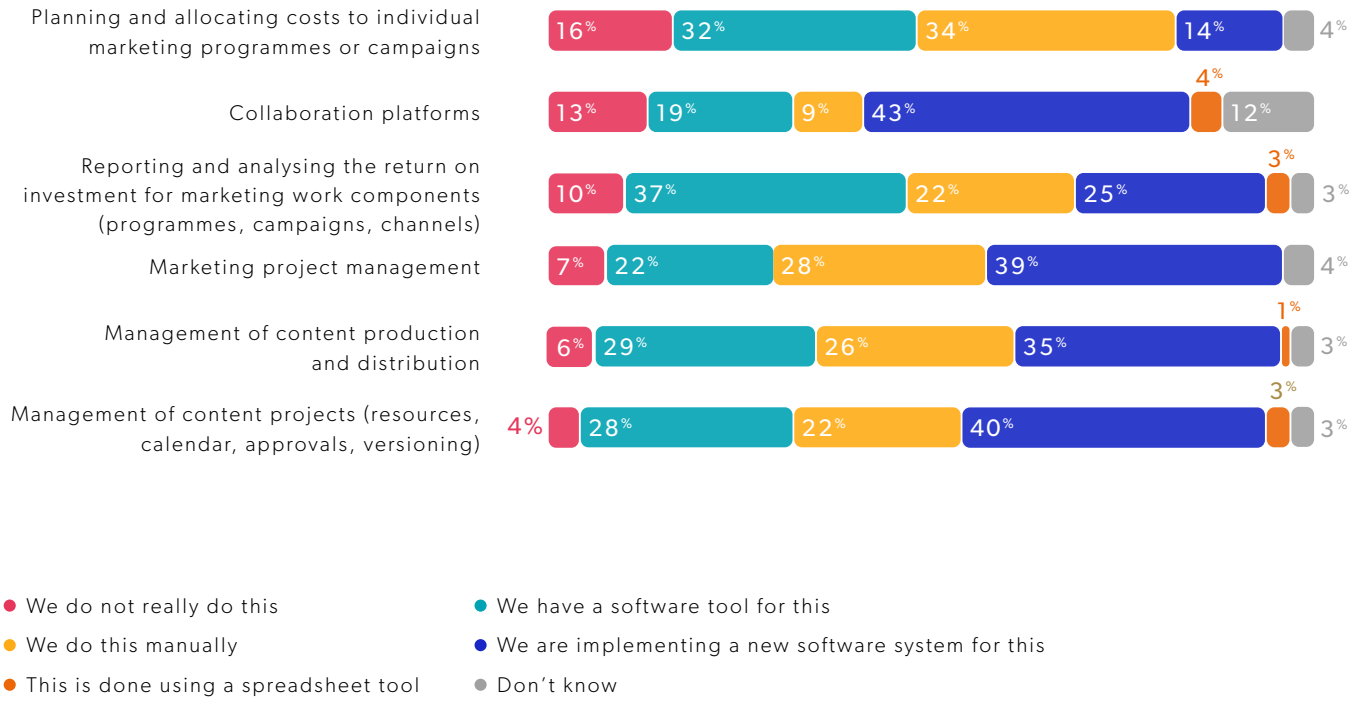
Ian Bennison, director of marketing operations, Intertrust Group. *"I look for vendors that can help me integrate. I ask them how they help to integrate to my other systems. If all they offer is some manuals then I say 'no thanks.' If they do not offer me the bare minimum of a customer success manager and a tech team to talk to my tech team, I am not interested. There's too many of them out there."*

2.3. MOPs itself requires technology

In addition to the technology that marketing needs to communicate and connect with buyers and customers, we also asked about software systems that directly support the operational marketing processes themselves – processes such as allocating costs, reporting ROI, project management, content production management and other collaborative projects.

Spreadsheets are still in significant usage for many of these processes, while the option 'we do this manually' was also a popular option. Just 9% claimed to have one software platform that supports all of their MOPS processes, though some might have been thinking of Microsoft Excel when they answered. A full two-thirds admitted that have multiple tools in use.

How do you manage the following operational marketing processes?



2.4. Key insights

- Just 4% of the survey respondents think that their martech stack is good enough for current and future use – a number that has been sinking dramatically since the 2020 survey. Over the last two years, B2B marketers have needed to transform fully to digital marketing programmes and campaigns, with the result that many have unearthed important issues or failings in their martech platforms. The focus on lead management of many marketing automation platforms is now being seen as too limited because marketers are now looking to engage with their customers with personalised content and deeper digital interactions.

- Three years ago, my colleagues in B2B Marketing did not even include customer data management in the list of martech platforms of interest. However, increased digital marketing and the requirement for better personalisation (personal, contextual and timeliness) has exposed data management as a weakness in many B2B organisations.

- The level of satisfaction with event management systems is indicative that many companies now realise the increasing importance of digital and hybrid events in their marketing mix. Experienced B2B marketers seek more than a presentation platform; they want a system that includes marketing functionality such as contact management and behavioural analysis.

- It is generally the case that most martech software vendors provide far too many functions for most of their customers to use, due to lack of applicability, user expertise or perhaps marketing process maturity. So, the long list of systems that are not fully (meaning all functions) deployed is not a surprise. Marketing software customers, especially those of the large vendors who have clouds or product suites of great complexity, are generally paying for features that they do not use or need.

- Some marketing software vendors now talk about 'MOPs' as if it is new product category, but, as we see in this report, MOPs is more about processes and organisation than technology. However, marketing work management is a new opportunity where some vendors can differentiate if they can deliver suitable solutions. My own vendor surveys among marketers often discover low-code vendors such as Pega, Nintex or Creatio being used, and the recent acquisition of Workfront by Adobe should also be noted here.

SECTION 3

Martech has been critically exposed by Covid

Our survey then proposed a list of potential changes in martech strategy and operations that could have been caused by the pandemic, both in 2021 and in this year's planning.

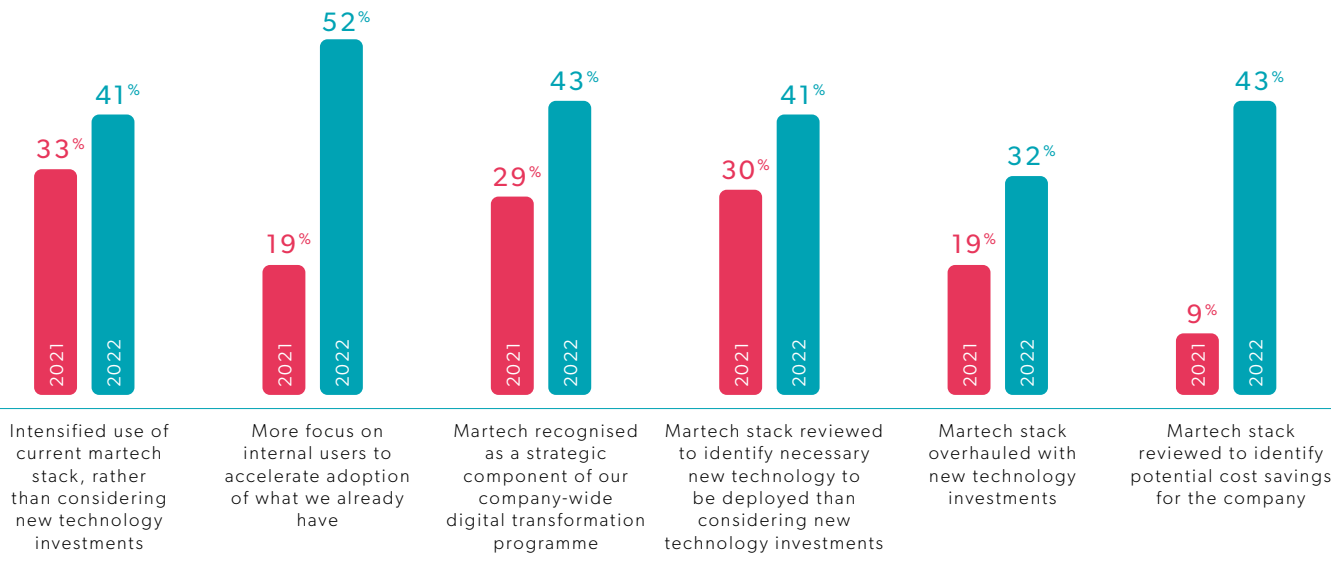
3.1. Martech strategy is under review

33% of the survey respondents confirmed that they used their current martech stack more intensely in 2021, as opposed to considering new technology. Another 41%, meanwhile, expect that to happen this year. In 2021, 19% focused on helping internal users to accelerate adoption and they will surely continue to do so, while being joined by another 52% who plan the same for this year. Nearly three-quarters of marketers acknowledge that one result of the crisis is that martech is now being recognised as a strategic component of the company-wide digital transformation programme. 29% achieved that status in 2021 and a further 43% expect it in this year.

Steffen Drucks, head of operations and data analytics, Atos. *"Our martech strategy has definitely changed. There's now a much greater reliance on digital, driven by the pandemic. It's propelled digital marketing across the whole organisation away from traditional, having taken away physical events for almost two years. It will be ever more important going forward."*

As hinted at in the earlier answers, most companies are re-assessing their martech stack in light of new challenges, with 41% planning new technologies to be deployed (and 30% already having done so in 2021) and 32% planning a technology overhaul (with 19% having done so in 2021). Nearly half (43%) say they will review their martech stack to identify potential costs savings.

How have (or how will) your martech strategy and operations change due to the pandemic?



3.2. Room for improvement in technology leverage

Another list presented was a series of potential improvement activities to better utilise martech systems. Respondents were asked to indicate if each activity was: not significant, already underway, or if it was a major priority for their organisation. The top priority is building out new marketing processes, cited by 92% of the respondents, with 41% confirming that this is a major priority. The next major priority is the provision of more guidance and training to current users, with 85% planning this activity, and 80% building up new team capabilities.

More than half of the companies interviewed are hiring additional martech talent, with 33% of respondents on a hiring spree, and a further 26% even considering it a major priority.

3.3. How dependent is marketing on technology now?

With digital transformation now unfettered in most companies, resulting in an impact on the need for digital marketing programmes, we thought it would be interesting to ask some questions about the importance of technology for marketers. After all, there are still many marketing professionals that consider their role to be more about creativity and communication than operating software systems and reading analytics data.

Well, 52% of the respondents now admit that they could not execute their marketing programmes without technology. Nearly one-third, 30%, however, claim that they could still be effective without it. Nearly half, 43% have identified the issue that they are not using all things possible with their current technology, while a striking 16% stated that they are being held back by having the wrong martech.

Simon Daniels, vice president, head of marketing operations, FD Technologies. *"Marketing is highly dependent on tech. You can't realistically do modern marketing without a reasonably sophisticated suite of technology. There are expectations of us now in terms of relevance, responsiveness and cadence, plus the challenges of being efficient, effective and agile. All of these things are predicated on using technology."*

3.4. Key insights

- The survey data confirms what many marketers have been experiencing over the last years: Covid-19 has been an accelerator for digital transformation. The importance of digital marketing, and the supporting technology, is now recognised as paramount in ensuring that business can continue, and customers can be served.

- 92% are building out new marketing processes. For the relatively marketing-mature organisations, this means progressing from lead management towards a more engaging, relationship-based sales motion. In companies now just beginning to boot-up their marketing, not uncommon in B2B where sales contacts/meetings had dominated pre-Covid, now want to set up basic inbound marketing programmes.

- The fact that 61% of companies (compared to the already high 51% in last year's survey) are now hiring people reflects not only an increased awareness in martech, though there continues to be a shortage of skills around data and analytics, but also is probably accelerated by the general staff churn happening in many companies now.*

- The balance between marketing as an engineering or creative discipline is demonstrated by the answers to the dependency question. While the two disciplines often seem to be in a conceptual wrestling match, modern marketing will continue to require a symbiotic relationship between creativity and technology. As technology drives ahead, creativity can ensure it is properly mapped against human intent, interests, passions, the need for discovery, connectivity and marketplace conversations. The more frightening result is the 16% of companies who feel that they are being held back by bad technology.

** The 'Great Resignation' phenomenon is being investigated and reported in an upcoming Propolis report for the Teams, Resourcing & D&I Hive.*

SECTION 4

Opportunity knocks for marketing software vendors and service providers

Over half of the survey respondents (52%) named the following challenge in deploying technology in their organisation: 'lack of support from the technology vendors as well as overpromising.' Overall, many of these companies are lacking in resources (sometimes people, but, more often, it's time) to operate the martech they have bought or need.

One of the changes in B2B marketing in recent years has been in the tone of messaging and communication between vendor and customer. Most B2B marketers guard against being perceived as aggressive in their marketing and their content marketing has become more educational and useful. Back in 2020, when we asked more detail about what customers expect from vendors, we had collected these possible areas of improvement which may serve as a reminder to those vendors reading this report:

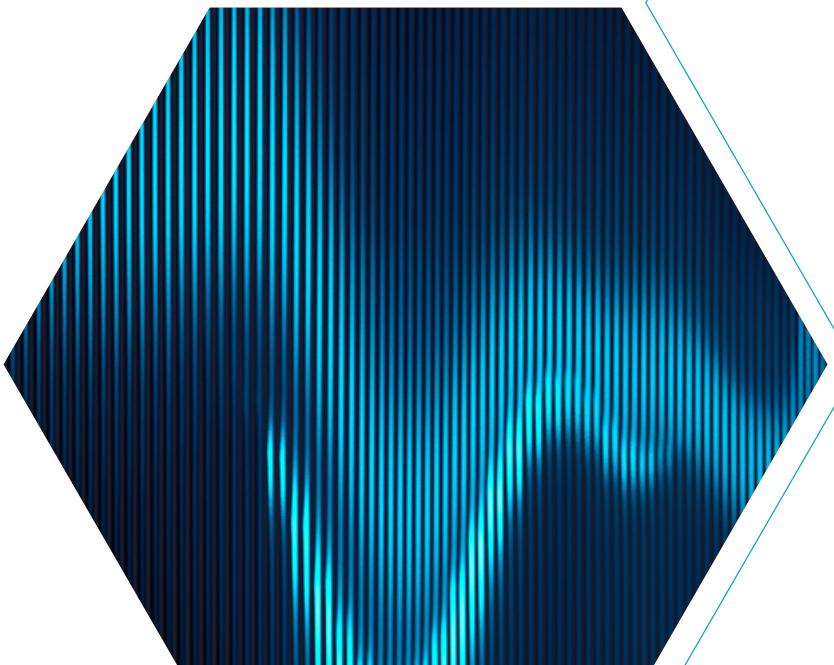
- Provide more business orientation (use cases, processes, language).
- Provide more guidance and responsiveness (training, support).
- Reduce the amount and tone of salesmanship.
- Improve integration with other elements of the martech stack.

4.1. Most valuable players

Each year, we ask the open question, 'Which is your most useful piece of marketing technology in your stack and why? Please state the specific brand platform name,' and we receive lots of interesting answers. Six vendors specifically were named by a multitude of respondents and therefore earn recognition as a 'most valuable player' (MVP).

The MVP award from the 2022 survey goes to **Salesforce**. This vendor has finished in this position three years running now. A clear second-place for MVP was earned by **Hubspot**.

Third place is shared by **Marketo** (named explicitly, not as Adobe) and **MailChimp**. Honourable recognition was also earned this year by **Sitecore** and **Allocadia**, while a further 30 vendors received mentions, including **Lotus Notes CRM**.



SECTION 5

Operating martech in practice is a challenge for most

The next section of the survey covered MOPs specifically. We asked about staffing and organisation, and went into more detail about who operated which processes across marketing.

Nearly one-fifth of the companies surveyed (17%) have a dedicated team of specialists for this work, with another 7% outsourcing it to an external provider, and 6% to their IT department. All in all, around 50% of companies do not have martech specialists at all.

Who operates your martech stack?



In 34% of the companies surveyed, the martech stack is operated by generalist marketers across the team, which is down from the 51% in last year's survey. It looks like many B2B marketing organisations are now building up specialist resources as far as possible.

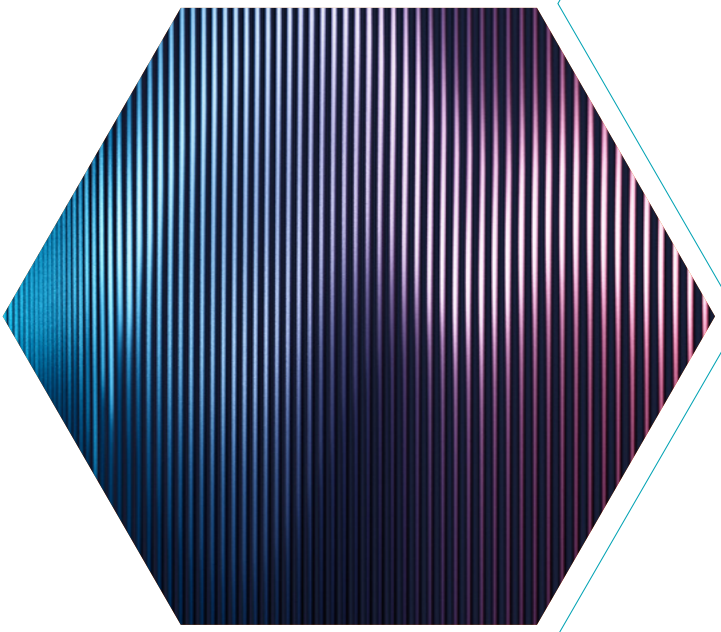
Gabriela Warren, senior director of marketing (EMEA), Workiva. *"I've learned very early on that having generalists only gets us so far. When we need to start integrating tools and talk to IT or different departments, we need specialists on their topics."*

With there being a wide range of roles possible within the MOPs position, the survey respondents were presented with an overall list and asked to describe how far their specialists fulfilled each role. The three most-important major roles selected for the martech specialists are as follows:

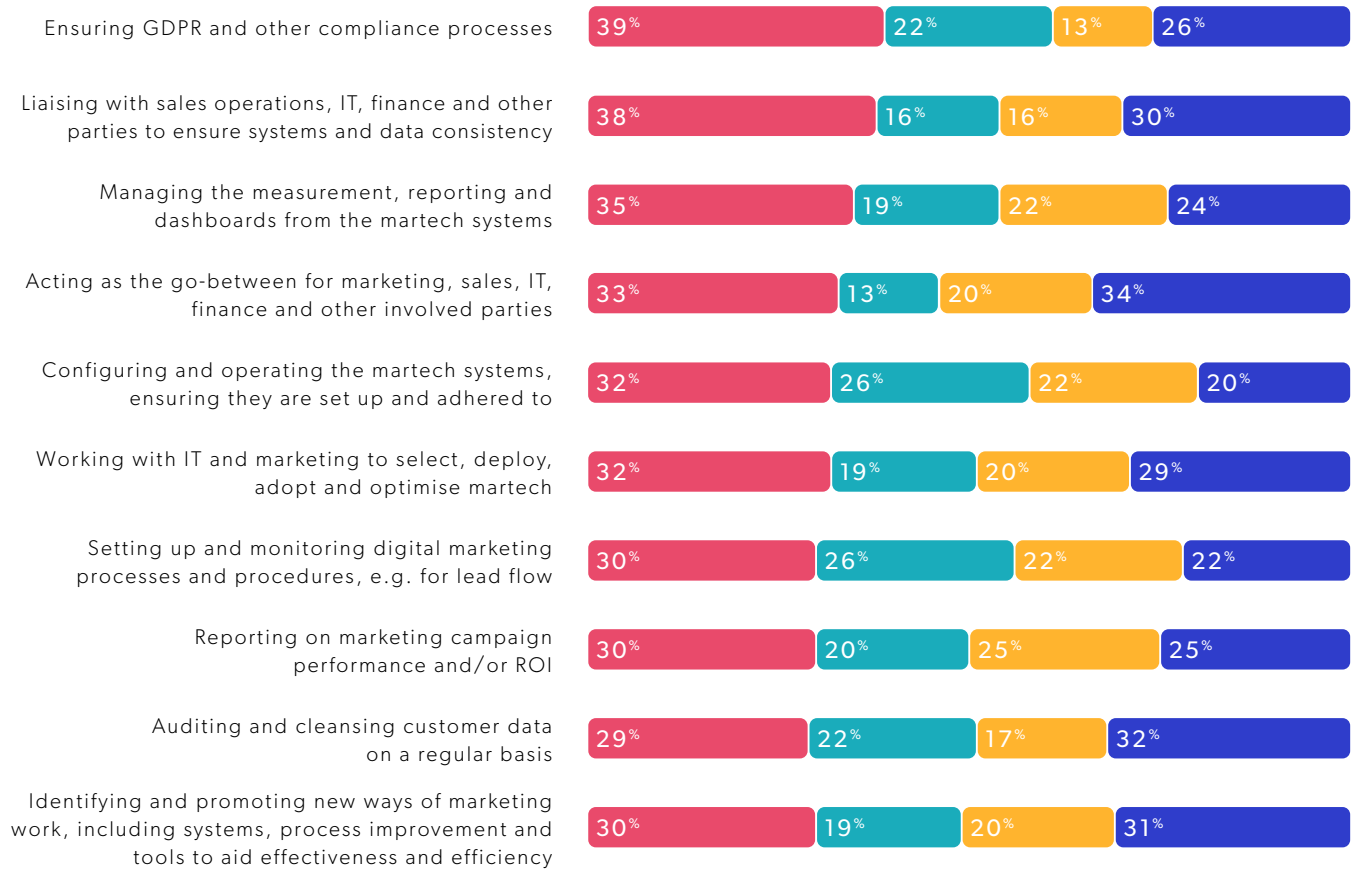
1. Ensure GPDR and other compliance processes.
2. Liaison with sales ops, IT, finance and other involved parties.
3. Managing the measurement, reporting and dashboards from the martech systems.

The first two roles were outside the top five in last year's survey, so it appears that MOPs has now taken on the (probably additional) workload of working with many external stakeholders. This is necessary as digital marketing affects, and is influenced by, many aspects of digital business.

The least important, in terms of role adoption, is the auditing and cleansing of customer data on a regular basis.



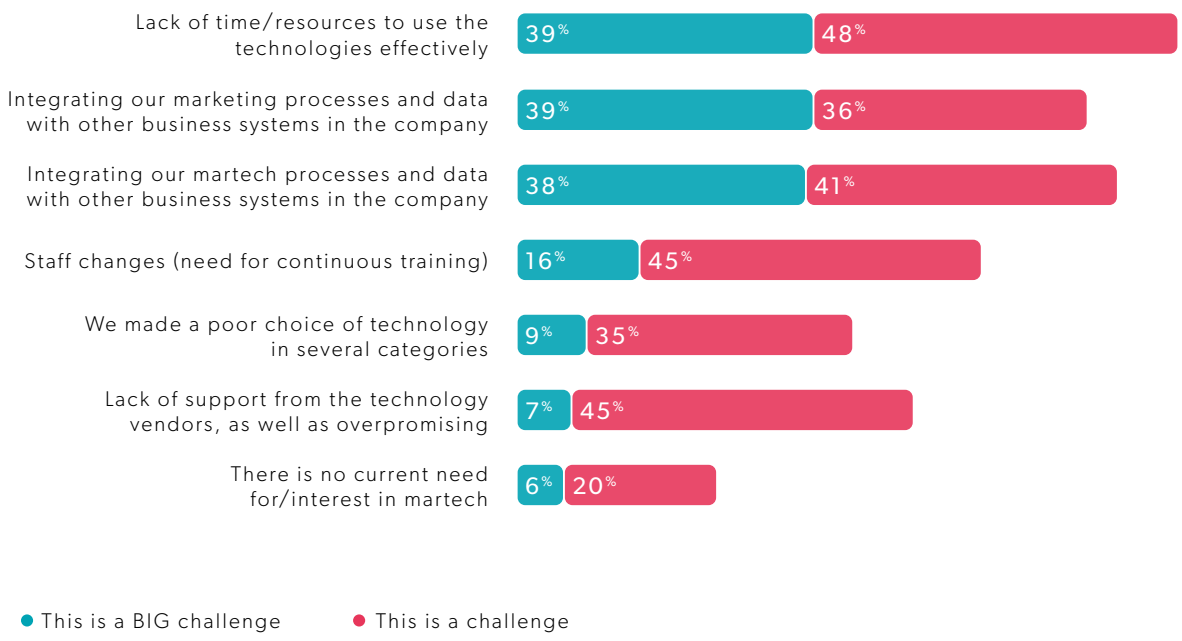
Which of these roles do your martech specialists perform and how?



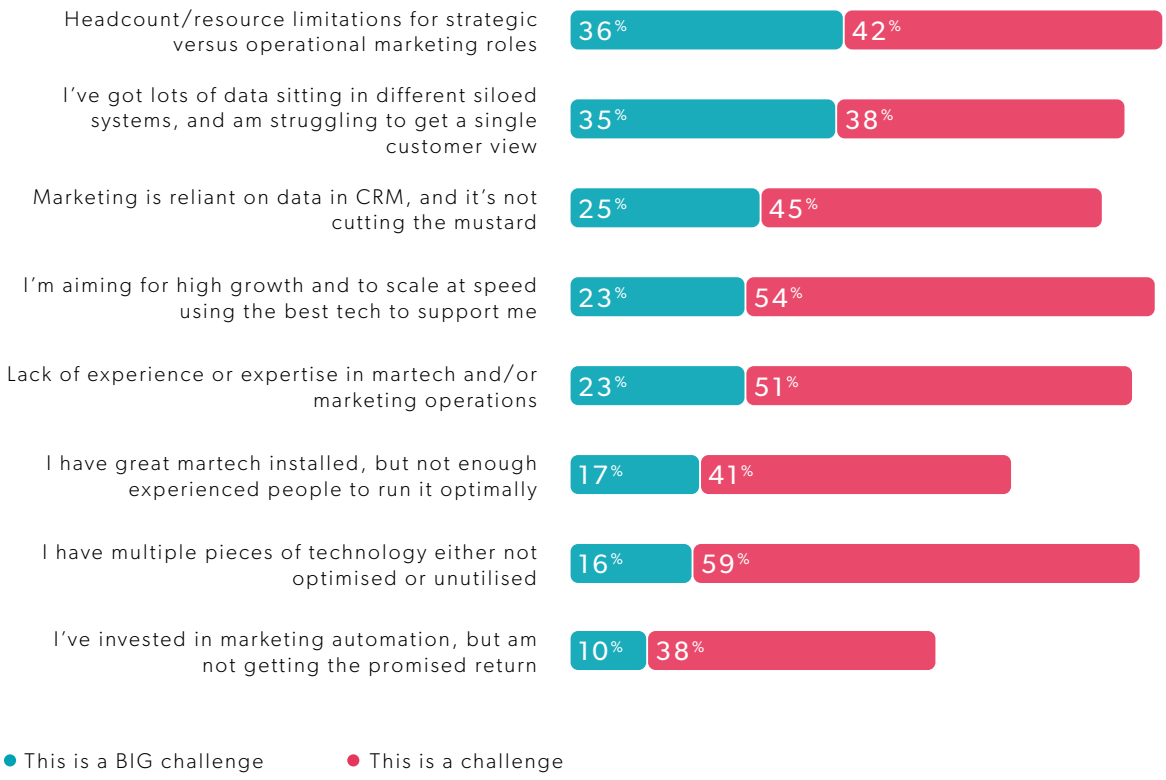
- This is managed out of our martech specialist team
- This is managed by the team which is external to marketing, as named in question 18
- This is covered by individual martech specialists as needed
- This is not covered at all

When asked to grade the challenges faced in deploying their martech, the respondents called out, as they did in the 2021 survey, 'lack of time/ resources' significantly more than anything else offered. In fact, only 13% did not cite this as a challenge. Also cited as a big challenge was data and process integration with other systems, both with other martech systems and with other company business systems.

How significant are the following challenges in deploying technology within your organisation?



How significant are these overall challenges in your marketing organisation?



To close the survey, we asked about several more general challenges that would inhibit martech progress. The highest-rated challenge revolves around resources to operate the martech, cited by 78% of respondents, with a massive 36% calling this a big challenge. Over three-quarters also see their company aiming for high growth, but do not see their martech meeting this objective. Third in importance was the overall lack of experience or expertise in martech and/or MOPs.

The interviewees also flagged some overall challenges around managing martech.

Gabriela Warren, senior director of marketing (EMEA), Workiva. *"Another challenge is getting everybody aligned and avoiding tech sprawl. Everybody wants a different tool – one that they've used in the past – and they're all putting in requisitions to the IT department who owns the budget for all of this separately. We need to make sure that we have that line of sight and that we're able to get everybody together behind the same thing, as well as enabling people to use those tools correctly."*

Steffen Drucks, head of operations and data analytics, Atos. *"There are multiple challenges, even starting before any technology is deployed. One of them is understanding what the right piece of technology is, considering the ever-increasing number of solutions. This means identifying redundancies between different systems and understanding business requirements. Stakeholder management is a key issue as well. It's a big challenge to manage all of the stakeholders involved considering that martech is so highly integrated into a company's IT landscape. Once the deployment is underway, your focus shifts towards training and staff retention to ensure you have the right skills to make best use of the tools."*

5.1. Key insights

- The survey demographics show that 38% of the companies represented are smaller than £10 million in revenue. These marketing teams are typically small and are invariably limited in resources. However, that is balanced by another 38% with revenues of over £50 million. With that in mind, the data presented is largely representative of companies of all sizes, though there is likely to be greater adoption of the MOPs concept in larger organisations.

- The major roles adopted by the martech specialists would be expected around the operations of the systems, but the rise of digital marketing and challenges of Covid-19 have raised the importance of compliance and liaison work.

- As the Propolis website says, "as the 'engine room,' marketing operations turns a great strategy into a winning formula for sustainable growth." However, the responsibility for data management is in danger of falling between the cracks in many B2B marketing organisations.

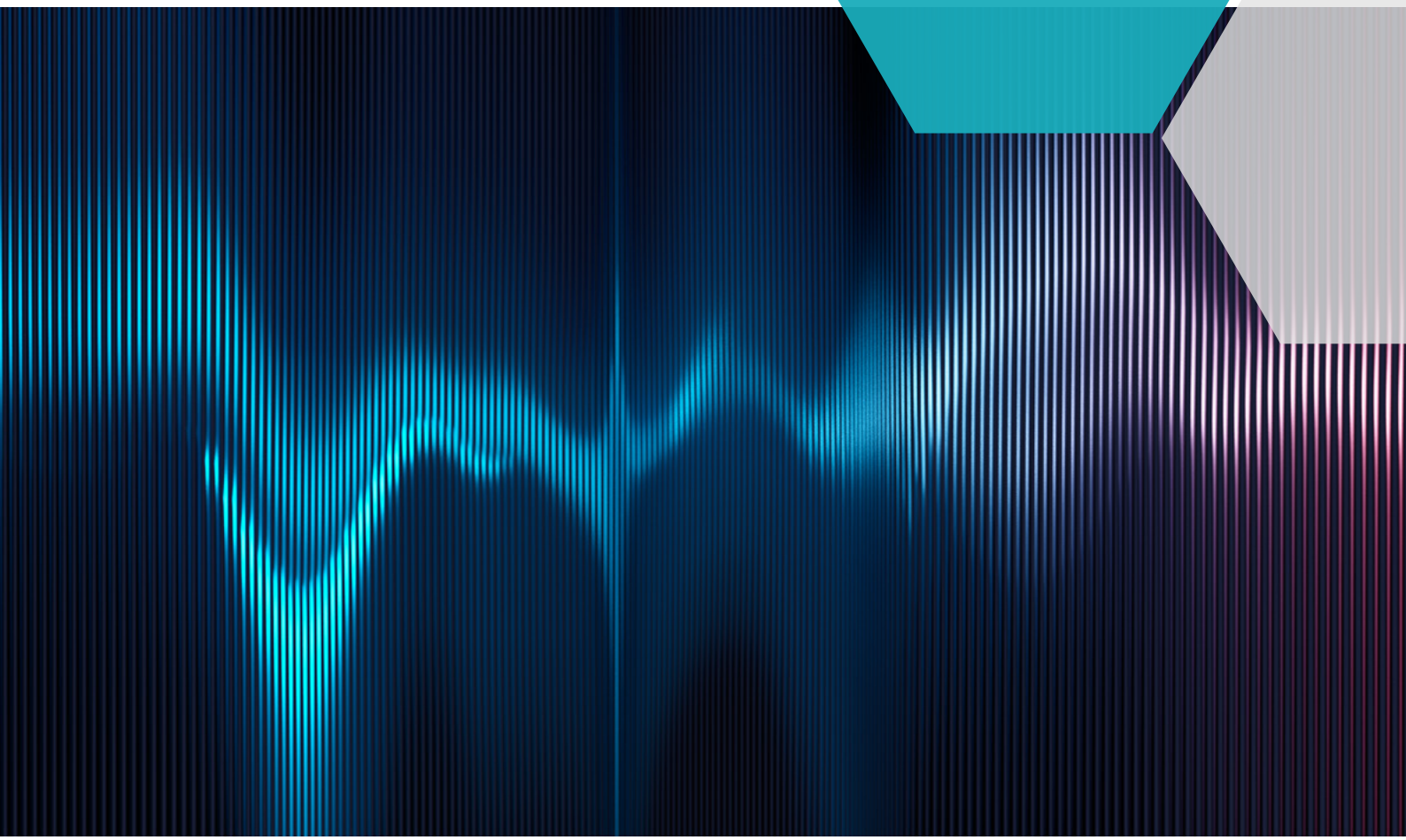
- When scoring the challenges, the most important one continues to be the lack of skills or resources to operate the martech systems, which is a consistent complaint in all martech surveys.

SECTION 6

Competency assessment results

As part of Propolis membership, an assessment framework has been created for the Marketing Operations & Process Hive, with all members invited to complete the self-assessment. A static version of this framework can be seen overleaf.

Head to page 27 to see where most marketers are at on this framework to date!



PROPOLIS

MARKETING OPERATIONS COMPETENCY ASSESSMENT FRAMEWORK

The following framework seeks to define the different stages of marketing operations maturity, and map them against different criteria required for success.

This framework is a flat or static version of the interactive Competency Assessment Programme, which is part of your Propolis membership. This assessment is designed to help you determine your specific level of competency against these criteria, compare them against other Propolis members and highlight areas to focus on for improvement.

If you've not taken your Competency Assessment yet, please contact your account manager or Propolis customer success manager.

Brought to you by B2B Marketing

MARKETING OPERATIONS COMPETENCY ASSESSMENT FRAMEWORK

PART 1. MARKETING TECHNOLOGY STRATEGY

BUSINESS CONTRIBUTION	1. BUILDING	2. DEVELOPING	3. PERFORMING	4. IMPROVING	5. EXCELLING
How formally are martech tools evaluated for selection and deployment?	Tools are chosen and implemented by whoever needs them.	A martech resource works with process owners to manage acquisition, renewals, evaluations, etc.	MOPs owns the budget for martech acquisition and has responsibility for tool selection.	MOPs leads the development of an agreed martech road-map following a rigorous assessment process.	MOPs is responsible for martech governance such as ROI and decisions on retention and further spending.
Are all martech tools tracked and recorded, including licensing, renewals and ownership?	Individual owners have responsibility for their own tools.	A martech resource has central oversight of all martech and tracks deployments.	A purpose-built, centrally-managed tool is in use for tracking all martech deployment.	MOPs routinely monitors all martech tools for effectiveness, ROI and compliance using a suitable tool.	MOPs is managing proactively all components of an integrated stack using a suitable tool.
Is change management taken into account when making tool amends?	Some ad-hoc guidance on new/updated tools is available as needed.	Deployment planning for new and updated tools includes user briefings and guidance materials.	Impact assessments are undertaken for all significant new initiatives and taken into account in deployment planning.	Change considerations are included as part of a roadmap and coordinated across all releases.	MOPs is responsible for development of comprehensive change management planning, including skills, process changes and enhancements to integrated technology.

MARKETING OPERATIONS COMPETENCY ASSESSMENT FRAMEWORK

PART 2. MARKETING OPERATIONS MANAGEMENT

BUSINESS CONTRIBUTION	1. BUILDING	2. DEVELOPING	3. PERFORMING	4. IMPROVING	5. EXCELLING
Is MOPs represented by a specific role or team?	MOPs tasks and responsibilities are distributed across the marketing team and undertaken by non-specialists.	One or more expert-users within disparate teams support the wider marketing department when asked to do so.	An individual MOPs specialist supports the entire marketing function reporting into another team.	MOPs comprises a team of specialists led by someone who reports to the head of marketing.	The head of MOPs is a recognised senior role within the business and aligns with peers in similar positions in sales, IT and elsewhere.
Do MOPs roles have structured development frameworks?	Some individuals in marketing have MOPs responsibilities as part of their objectives.	The individuals with MOPs responsibilities have associated KPIs that feed into their career progression.	MOPs competency achievements necessary to progress to the next level of seniority within the organisation have been identified.	Each MOPs role has a framework indicating career progression and success factors, tied to marketing and corporate goals/objectives.	There is a formal career progression track for MOPs leadership to progress into more senior positions within or outside MOPs.
Are projects initiated across marketing managed according to agreed principles?	Everyone is responsible for their own project, including sign-off, initiation and progress reporting.	New MOPs-related initiatives are documented and circulated for review and comment before sign-off.	New initiatives are centrally coordinated and circulated outside of marketing as appropriate.	MOPss acts as a project office, coordinating resource allocation, tracking and delivery across marketing.	MOPs is recognised as a centre of excellence for project management and may even provide this as a service to other functions across the business.

MARKETING OPERATIONS COMPETENCY ASSESSMENT FRAMEWORK

PART 3. MARKETING PROCESS DEFINITION AND MONITORING

BUSINESS CONTRIBUTION	1. BUILDING	2. DEVELOPING	3. PERFORMING	4. IMPROVING	5. EXCELLING
Are processes such as lead flow, campaign execution and content development agreed, documented and monitored?	Marketing activities are undertaken on a best-endeavours basis according to individuals' understanding.	Individual process-owners document workflows and procedures and share this as appropriate.	Process documentation, user guidance, handovers and other interaction points are captured centrally and maintained by MOPs.	MOPs proactively consults with all applicable process owners to design/ capture all processes and documentation is stored centrally.	Processes are subject to continuous improvement in conjunction with owners, avoiding a 'set and forget' mindset.
Is a process methodology such as agile, lean or continuous improvement in use?	No formal methodologies have been adopted.	Individuals have awareness of different techniques and endeavour to apply them within their own work or teams.	Tenets of certain methodologies, such as stand-up meetings, 'five why' questioning, etc, have been adopted across marketing.	A specific methodology is in place and followed according to best-practice principles.	MOPs delivers training and guidance to other teams in marketing on suitable methodologies and tracking goal attainment.

MARKETING OPERATIONS COMPETENCY ASSESSMENT FRAMEWORK

PART 4. REPORTING AND ANALYTICS

BUSINESS CONTRIBUTION	1. BUILDING	2. DEVELOPING	3. PERFORMING	4. IMPROVING	5. EXCELLING
How are marketing performance metrics generated and presented?	Individuals compile reports for their own areas and share on an ad-hoc basis.	Performance reporting across marketing is compiled into a central document, usually PowerPoint, and shared on a scheduled basis.	Point solutions for compiling and presenting key metrics are in use, improving visibility and production efficiency.	A suite of performance metrics has been agreed and built into a suitable 'always-on' visual reporting tool.	Performance metrics are driving decision-making within marketing and aligned groups, e.g. sales.
Is campaign activity across all channels tested for effectiveness?	No testing takes place, except for variations between subsequent executions.	Simple tests on subject lines, copy and creative for email and web pages are used occasionally to make ad-hoc improvements.	All activity is subject to a testing plan to identify ongoing improvements.	A/B and multivariate testing is applied to all activity to identify successful approaches and techniques.	Campaign teams are continuously improving results through testing and reporting to ensure optimisation and continuous improvement.
What attribution model or methodology is applied to campaign response to track activity effectiveness?	Inbound lead sources are not specifically tracked, preventing allocation of outcomes to specific activity.	Prospects and deals are manually attributed to applicable sources for the purpose of tracking marketing attribution.	A click model, such as first/last, distributed, weighted, etc, is applied to responses to determine marketing attribution and influence.	Statistical techniques are applied to campaign responses to model campaign effectiveness.	Model-driven attribution lead to changes in campaign execution and response management.

MARKETING OPERATIONS COMPETENCY ASSESSMENT FRAMEWORK

PART 5. CROSS-ORGANISATIONAL CO-ORDINATION

BUSINESS CONTRIBUTION	1. BUILDING	2. DEVELOPING	3. PERFORMING	4. IMPROVING	5. EXCELLING
Has a work management tool been deployed for coordinating activity across and outside of marketing?	No specific tools have been adopted apart from standard shared documents.	A work management tool is in use by some individuals and teams within marketing, but not consistently.	All work requests between individuals and teams within and outside marketing are captured and tracked in a standardised, purpose-built tool.	Workflow automation tools used by marketing are shared or integrated with other corporate work management solutions, allowing seamless handoff and collaboration.	Reporting from workflow tools is used to optimise processes and ensure coordination between marketing and other functions.
Are budgets managed centrally across marketing using a suitable tool?	Individuals manage their own spending on an ad hoc basis, with limited reconciliation or central view.	Budget holders are provided with common, spreadsheet-based tools to manage their budgets, but there is limited additional coordination.	A central, spreadsheet-based tool, managed by MOPs, is used to track all budgets with some liaison and reconciliation with finance.	Budgets are allocated to those responsible for spending within marketing and managed in a tool that links to finance systems.	MOPs manages budgets, leveraging the tool and working with budget owners on allocations, adjustments and accruals to optimise budget utilisation in support of goals.
Has a relationship with stakeholders outside marketing been developed and managed?	Requests are made to specific functions outside marketing as needs arise.	Some informal relationships exist where individuals have made contact across the business.	Relevant stakeholders have formed a working group to coordinate on significant issues without necessarily having formal recognition.	Relationships with key senior stakeholders, including sales, product and partner teams are proactively fostered and developed with executive support.	MOPs leads the development of relationships and cross-functional working around the business, including strategy and planning.

6.1. What's the state of maturity when it comes to marketing operations and process?

At the time of writing this report, a total of 342 members had completed this assessment, spread across 39 different marketing organisations across 27 different companies. We calibrate maturity across a scale of one to five, ranging from 'building' (1), through to 'developing' (2), 'performing' (3), 'improving' (4) and 'excelling' (5). The average scores across the cohort of 342 propolis members are as follows:

Cross-organisational coordination:
2.66

Marketing operations management:
2.45

Reporting and analytics:
2.32

Marketing technology strategy:
2.29

Marketing process definition and monitoring:
2.12

The full distribution can be seen in the heat map on the next page.. However, we realise that certain organisations will of course be further along their journey to excellence than others, and so we have created a second graphic on the following page. This second graphic demonstrates where the average company is in their assessment, as opposed to the average individual. After all, certain companies have more respondents than others, so taking an average for each company provides a more accurate way of presenting the state of maturity.

HEAT MAP: ALL RESPONDENTS

	BUSINESS CONTRIBUTION	1. BUILDING	2. DEVELOPING	3. PERFORMING	4. IMPROVING	5. EXCELLING
Marketing technology strategy	Martech selection, management and development	Piecemeal 'user-chooser' selection and management of tools, with minimal guidance or oversight.	Central oversight on tool management and deployment, plus some user guidance.	MOPs owns budget, tool selection, management and planning.	MOPs leads development using roadmap, including routine monitoring and ROI evaluation.	MOPs responsible for martech governance, including proactive management as part of ongoing change-management remit.
Marketing operations management	Operations formalisation, structure and management	MOPs reponsibilities distributed across the team to non-specialists, with projects operated in isolation.	Expert users support wider team; formalisation of MOPs responsibilities begins, including project management	Individual MOPs specialists appointed, but with management outside of marketing.	MOPs team established, reporting to marketing leadership, including clear career progression, and project ownership/ oversight.	MOPs leader recognised as senior role; MOPs function recognised as a centre of excellence.
Marketing process definition and monitoring	Process formalisation and set up for ongoing improvement	Individuals operating in isolation with no formal methodologies.	Sharing and formalisation of workflows and best practice begins.	Centralised best practice repository maintained by MOPs, with standardisation of methodologies beginning.	Two-way dialogue regarding process development between users and MOPs; specific working methodologies in place.	Continuous improvement ethos for process evolution with MOPs co-ordinating uptake.
Reporting and analytics	Metric formalisation and monitoring, plus attribution	Reporting and testing highly individualised and effectiveness difficult to determine.	Centralised report creation and sharing begins, plus simplistic campaign testing. Attribution is manual.	Significant formalisation of report sharing and testing regimes; basic attribution instigated.	Robust and rigorous reporting via dedicated platform; rigourous and thorough campaign testing, aligned with statistical analysis.	Metrics driving business decisions; campaigns highly optimised and subject to continuous improvement; model-driven attribution enables in-depth analysis.
Cross-organisational coordination	Collaboration, deployment, budgeting and stakeholder management	Collaboration only through standard sharing docs; limited central view of spending or relationships with functions outside marketing.	Random acts of collaboration; standardised budgeting tools, but limited co-ordination; informal relationships outside marketing.	Standardisation of means and methods of collaboration; central spreadsheet tool to track budgets; informal cross-functional efforts on significant issues.	Marketing workflow tools integrated across organisation; marketing budgets formally linked to finance systems; proactive formal collaboration with wider stakeholder groups.	Ongoing workflow optimisation; proactive budget management to maximise utilisation; formal cross-functional working led by MOPs.

0 – 5% | 6 – 10% | 11 – 20% | 21 – 30% | 31 – 40% | 41 – 50% | 51 – 60% | 61 – 70% | 71 – 80% | 81 – 90% | 91 – 100%

HEAT MAP: COMPANY AVERAGES

	BUSINESS CONTRIBUTION	1. BUILDING	2. DEVELOPING	3. PERFORMING	4. IMPROVING	5. EXCELLING
Marketing technology strategy	Martech selection, management and development	Piecemeal 'user-chooser' selection and management of tools, with minimal guidance or oversight.	Central oversight on tool management and deployment, plus some user guidance.	MOPs owns budget, tool selection, management and planning.	MOPs leads development using roadmap, including routine monitoring and ROI evaluation.	MOPs responsible for martech governance, including proactive management as part of ongoing change-management remit.
Marketing operations management	Operations formalisation, structure and management	MOPs reponsibilities distributed across the team to non-specialists, with projects operated in isolation.	Expert users support wider team; formalisation of MOPs responsibilities begins, including project management	Individual MOPs specialists appointed, but with management outside of marketing.	MOPs team established, reporting to marketing leadership, including clear career progression, and project ownership/ oversight.	MOPs leader recognised as senior role; MOPs function recognised as a centre of excellence.
Marketing process definition and monitoring	Process formalisation and set up for ongoing improvement	Individuals operating in isolation with no formal methodologies.	Sharing and formalisation of workflows and best practice begins.	Centralised best practice repository maintained by MOPs, with standardisation of methodologies beginning.	Two-way dialogue regarding process development between users and MOPs; specific working methodologies in place.	Continuous improvement ethos for process evolution with MOPs co-ordinating uptake.
Reporting and analytics	Metric formalisation and monitoring, plus attribution	Reporting and testing highly individualised and effectiveness difficult to determine.	Centralised report creation and sharing begins, plus simplistic campaign testing. Attribution is manual.	Significant formalisation of report sharing and testing regimes; basic attribution instigated.	Robust and rigorous reporting via dedicated platform; rigourous and thorough campaign testing, aligned with statistical analysis.	Metrics driving business decisions; campaigns highly optimised and subject to continuous improvement; model-driven attribution enables in-depth analysis.
Cross-organisational coordination	Collaboration, deployment, budgeting and stakeholder management	Collaboration only through standard sharing docs; limited central view of spending or relationships with functions outside marketing.	Random acts of collaboration; standardised budgeting tools, but limited co-ordination; informal relationships outside marketing.	Standardisation of means and methods of collaboration; central spreadsheet tool to track budgets; informal cross-functional efforts on significant issues.	Marketing workflow tools integrated across organisation; marketing budgets formally linked to finance systems; proactive formal collaboration with wider stakeholder groups.	Ongoing workflow optimisation; proactive budget management to maximise utilisation; formal cross-functional working led by MOPs.

0 – 5% | 6 – 10% | 11 – 20% | 21 – 30% | 31 – 40% | 41 – 50% | 51 – 60% | 61 – 70% | 71 – 80% | 81 – 90% | 91 – 100%

SECTION 7

Who will be the winners?



KARLA WENTWORTH,
founder and managing director, Vantage Clever, and Propolis Hive expert for Marketing Operations & Process

During my 25-year career in MOPs, I have never known a more exciting time for those in the field, and it doesn't take a genius to understand why – marketing technology.

The last two years have seen some of the largest technical growth of all time as the pandemic accelerated digital dependency worldwide. But, as the dust starts to settle, it's clear that technology is becoming one of the main focus points of all modern marketing departments.

So, let's start with the eye watering statistic this report has highlighted. Almost everyone who completed it expressed some form of dissatisfaction with their martech – a staggering 96%. I have a few thoughts on this.

Firstly, as technology develops at a rapid pace, we're going to see some of the major martech vendors racing against emerging solutions to deliver the exciting functionality that is in development as we speak. That means that, as long as there is something new, there will always be desire for that something new. My advice is not to be so quick to ditch existing tech, but take time to understand your own goals and the product development path of your vendor.

Another point is around functionality and whether you have it properly aligned to your strategy. Technology is often the point of blame for many marketing issues, but, by its very nature, martech can only be set up to support your goals and strategy, and this is where the largest area of benefit can come from. Step back from your fire-fighting day-to-day and consider the alignment of your systems to your goals, then have your specialists optimise.

This brings me nicely to my final point – talent. There's a talent challenge right now, again propelled by the pandemic and new ways of working, but it also has a significant impact in MOPs space as it grows at a disproportional rate to the talent available. This means that marketing departments are diluting their talent by using generalist and strategic marketers to become technical specialists. It's been happening for some time and the recruitment problem is compounding the issue. Neither the role of a technical specialist or a strategic marketer should be taken for granted and it should be realised that they are different skill sets.

Another area I wanted to highlight is integration. It's now almost impossible to operate a modern marketing department without technology, and plenty of it. As that technology starts to duplicate and overlap functionality, it will create a tidal wave of data. The very thing we digital markerters have been craving for decades is now the thing that's paralysing our decision-making – if we can present it and read it in the first place. Integration capability is now increasing and I predict an explosion of no and low-code solutions, as well as vendors focusing on including comprehensive native integrations. What's for sure is that

integration is a strategy in itself and another reason your technical specialists need to be consulted to create integrations that support your goals. Integration will bring your stack together, present the data you need and become the only way you will find the signal from the noise.

It's difficult not to conclude that, with the current rate of dissatisfaction, a focus on martech will be in the plans of most marketing departments over the next 12 months – and rightly so. In an ever-increasing digital world, those who have rationalised martech aligned to their strategy, are the ones who will win.

"Almost everyone who completed it expressed some form of dissatisfaction with their martech – a staggering 96%"

SECTION 8

Recommendations

BY PETER O'NEILL

The evolution of martech is certainly not slowing down. As many B2B marketers pointed out in this research, a martech stack is never complete. It continues to reinvent itself on an ongoing basis. Established technology categories improve or mature by adding new computational technologies, such as artificial intelligence and predictive analysis. In addition to this, new technologies appear to support new processes in the new digital B2B marketing paradigm where you want to do things like:

- Collect personalised behavioural data from data providers, and use it to make your marketing content more contextual, engaging and impactful.
- Provide an optimal customer experience and ensure that this is the case for all possible touchpoints – not just marketing interactions.
- Move from a static content library to a Netflix-type portal of videos and presentation.

So, what should marketers be aware of during this tidal wave? The future success of a martech strategy, and the resulting operations of the digital marketing programmes, depends on the following considerations:

- **Rethink what marketing does now.** Technology is only an enabler. The initial planning should be around the role of marketing and the required organisation, and the associated processes, to fulfil that role. Covid-19 and the new business reality has changed that role. For example, consider that B2B Marketing is now in the process of maturing from lead generation, or lead scoring, to a more holistic contribution to the customer experience or engagement. An effective martech strategy is predicated upon a clear marketing strategy.
- **A strategic approach is needed.** A clear, strategic approach to the martech stack ensures that, ultimately, spending across the whole marketing budget is optimally invested. Marketing has become primarily digital and requires technology to operate effectively, and a suitable martech infrastructure is required by every marketing department to achieve that goal. However, equally, digital marketing also requires the appropriate organisation and framework of business processes to be effective in operating and leveraging that infrastructure.
- **A martech strategy must include resource planning.** The martech strategy should be a framework for all staff involved with the technology. Digital marketing will mean that there are various categories of marketing staff now involved: marketing application end-users, marketing operations staff and executives who need reports and dashboards; but also citizen developers of digital experiences or external marketing apps; or those potential rogue buyers of marketing software (such as analytics) for individual use. In a democratic modern business environment, there is no way to stop the individual investments, but establishing a framework will limit any potential damage that is caused (integration, security, non-compliance, privacy breaches).
- **Martech remains a work-in-progress.** The true value of a martech strategy is not that it is documented and placed on a bookshelf. It is in the meetings, communications and negotiations that are held to discuss the plan. That continuous dialogue helps everybody to understand the importance of planning and then aligning to that plan and will probably limit resource and integration issues in the future. A martech strategy should be a continuous process, managed by the head of MOPs, and openly accessible to all of the marketing staff as listed above.

SECTION 9

Commentary by Gilroy



KAROL GAJEWSKI,
head of digital strategy, Gilroy

The road to digital marketing nirvana has long been littered with wasted budget, unused tools and discontented users or stakeholders. Covid-19 has not only moved the goalposts for businesses and society, but also exposed the gaps in digital transformation and digital marketing capabilities.

Martech is supposed to help manage the ever-growing choice of channels, touchpoints and volume of data. Instead, vendors vie for marketers' attention by making big promises around all-encompassing features, integrations, and ease of implementation, but the reality often falls well short. Add the complex relationships between different business functions and often unclear ownership of technology and you end up in the pickle many businesses find themselves in today.

Only 4% of respondents believe their tech stack meets current and future needs, close to 60% recognise the need for redevelopment in the next 12–24 months and a staggering 32% know that their tech doesn't cut it, but don't know what to do about it.

The breakdown of the tech category satisfaction makes it clear that we are looking at a maturity curve. Web analytics, web management and CRM systems lead the way (they have been around the longest), whereas customer data and sales enablement platforms have the lowest adoption and satisfaction levels. Given the vast amounts of data in today's world, and the need for marketing and sales to work very closely together, this is worrying.

What becomes apparent is that the current tech stack needs an evolution if not a revolution. Do we throw everything away and start afresh? I'd advise a different approach.

First of all, it is far more productive to nail your marketing and tech strategy and create a cross functional centre of excellence than it is to buy more tech. In the marketing operations world processes, goal definitions and integrations play a more critical role than implementing new platforms.

Secondly, automation still needs people to set it up and make it work. Investing in the right talent, training and adoption goes a long way in getting the most out of your tech. It is promising to see that the focus on higher adoption of existing tech has more than doubled in the last year alone, from 19% in 2021 to 52% this year.

Thirdly, don't judge a martech platform by its website. During an audit of over 60 leading platforms relevant to large enterprises, we have reinforced our view that there is no such thing as a perfect, all-encompassing tool, even within its category.

The old consulting people, processes and technology framework is still very valid. The report results confirm that the biggest challenge with tech is a lack of time and resources (87%), followed by issues with integrating marketing and martech processes with other functions and systems used by the business.

The promised easy integration between platforms is often just scratching the surface and the orchestration tools that can make sense of different types of data are often necessary to achieve a tech stack's full potential. Orchestration systems also need people with the right skills, know-how and time. This is where external experts come in handy in navigating the complexities of multiple systems, agreeing common definitions and streamlining processes.

Don't chase new toys. Follow your strategy and find your own way to evolve your martech stack.

About

B2B Marketing & Propolis

B2B Marketing was founded in 2004, starting life as a print magazine. It has since evolved into the world's go-to resource for B2B marketers looking to become best-in-class at what they do, and place themselves at the forefront of marketing evolution.

B2B Marketing produces a number of products, including: insight reports; interviews with the best minds in the business; *The B2B Marketing Podcast*; webinars; conferences; and even Awards programmes.

The latest product in B2B Marketing's extensive portfolio is Propolis – an exclusive community for B2B marketers. Propolis gives you instant access to unbiased experts, training, technical resources, research and peer-to-peer learning, all supported by a dedicated customer success manager.

Want to learn more about B2B Marketing or Propolis specifically? Just get in touch using the contact details below and start your journey with us today.

b2bmarketing.net
propolis.b2bmarketing.net

info@b2bmarketing.net
+44 (0)20 7014 4920

B2B Marketing | PROPOLIS

Gilroy

Gilroy is a leading enterprise B2B agency and the home of SMART ABX. We work collaboratively with world leading technology and B2B brands, taking an insight driven, customer-centric approach that applies the strategic intent of ABM to a digitally led multichannel landscape.

SMART ABX addresses the entire sales funnel, from awareness and engagement, through nurture, and on to winning major bids and deals. By bringing together first, second and third-party data with contextual research by our in-house analysts, we can effectively respond to the challenges and opportunities customers face, informing, influencing, and inspiring them throughout their buying journey.

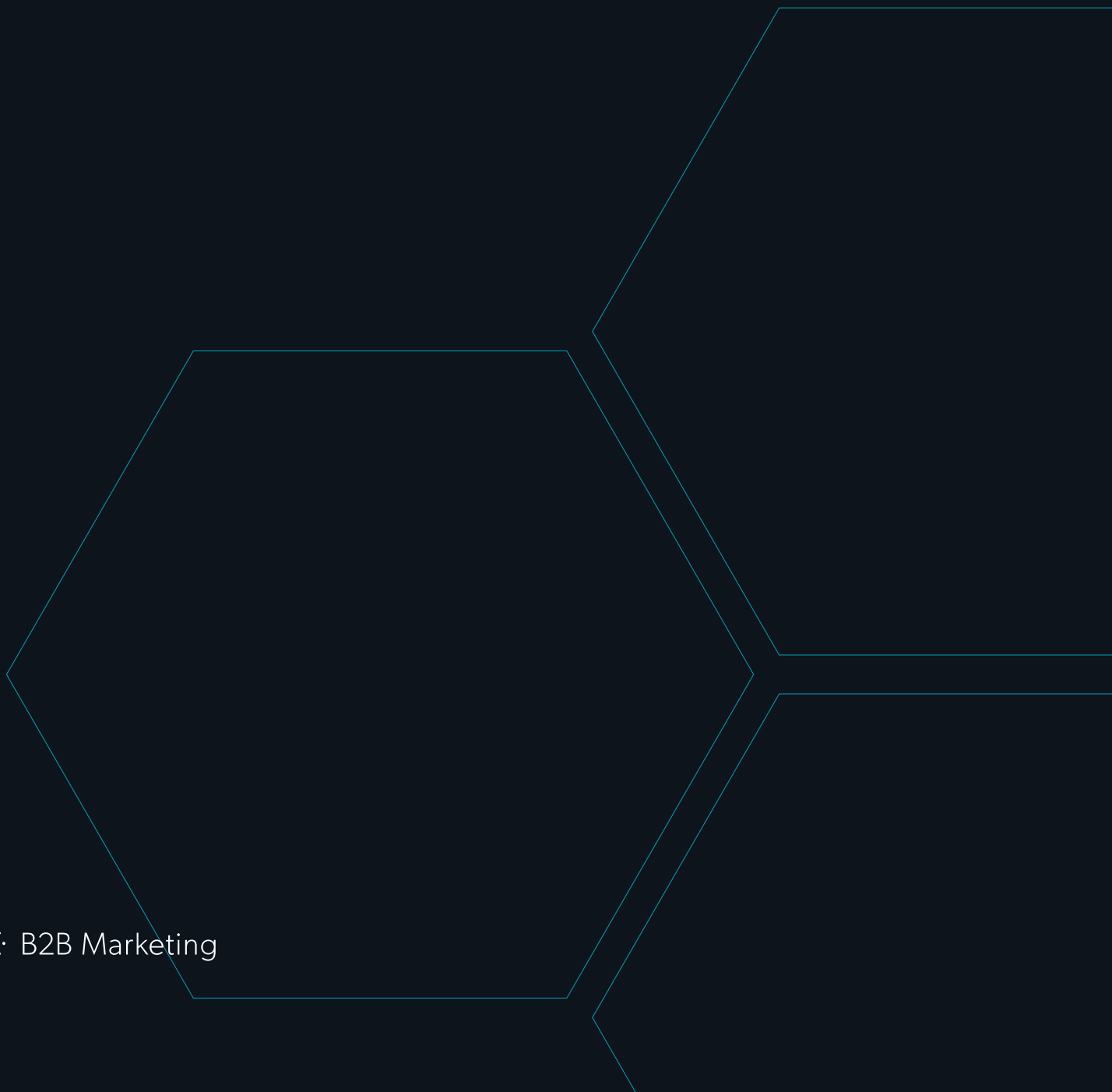
GILROY

PROPOLIS

CONTACT US

B2B Marketing
Westgate House
9 Holborn
London
EC1N 2LL

Tel: +44 (0)20 7014 4920
info@b2bmarketing.net
b2bmarketing.net/propolis



B2B Marketing