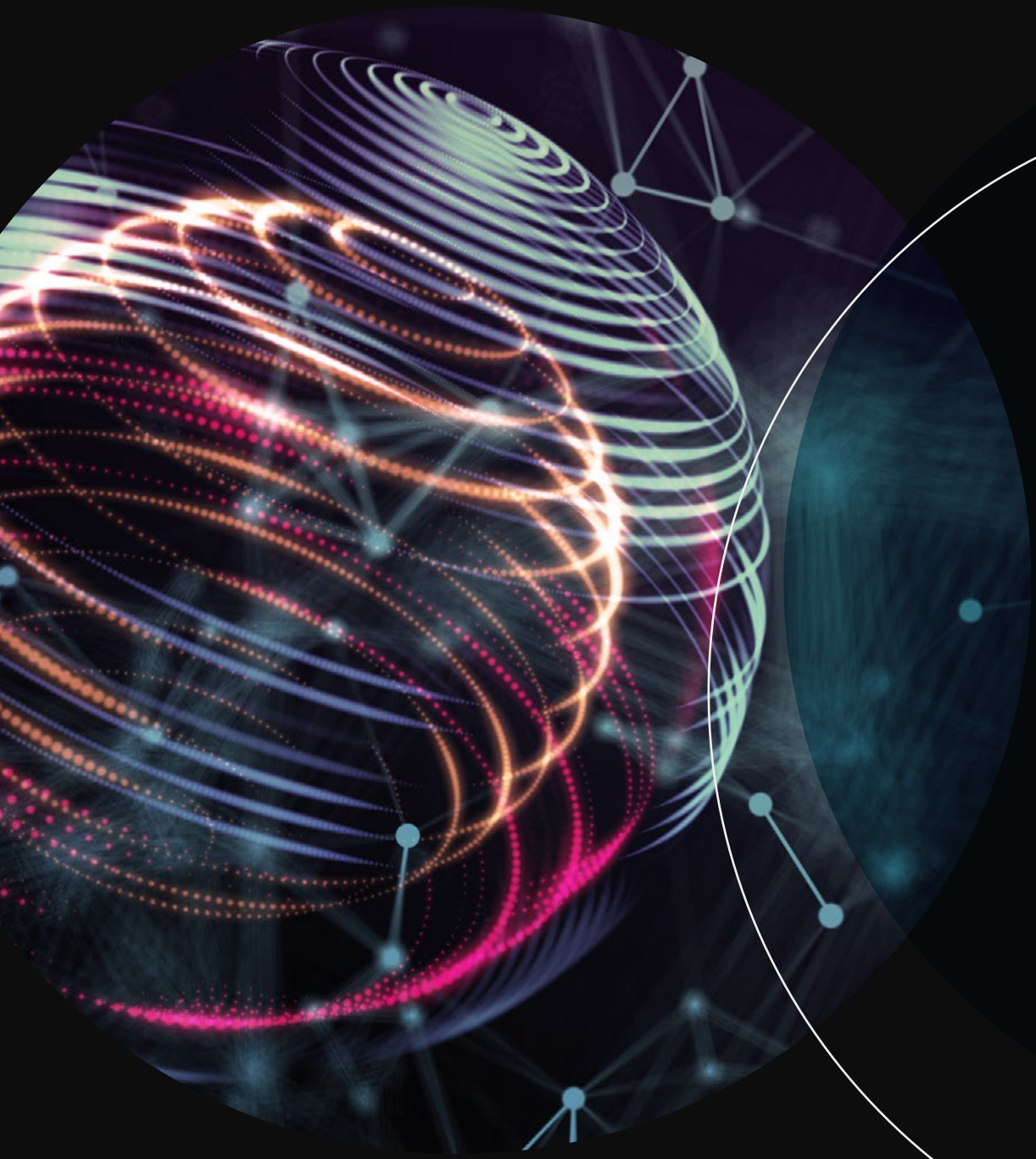
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A practical guide to marketing operations



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Introduction

Marketing is digital. Digital requires martech. Martech needs to be operated.



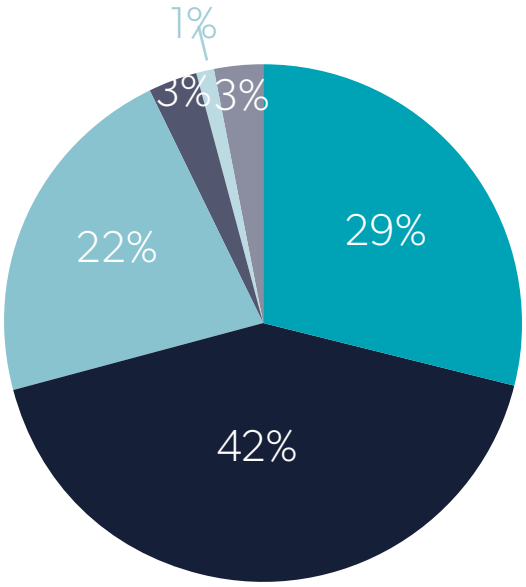
It was with this hypothesis in mind that we launched the second annual marketing operations survey, examining the landscape. You won't be surprised to hear it unearthed a growing appetite.

A near conclusive 93% of B2B marketers said the function is important or critical in delivering digital transformation. Most modern marketers already appreciate the role of marketing operations. But we knew that already – this isn't a ***beginner's guide***.

Marketing operations is the process, people and technology behind your marketing

93% of B2B marketers say the marketing operations function is important or critical in delivering digital transformation

Figure 1: **How important is marketing operations in delivering digital transformation?**



29% Critical
42% Very important
22% Important
3% Not important
1% Irrelevant
3% I don't know

Maybe you've realised your competitors are running marketing operations and feel you should too. Perhaps you've spotted an opportunity to gain a competitive advantage while others are resting on their laurels.

Whichever camp you're in, this is the place for you. In these pages we'll explore the practicalities of marketing operations what it really entails and how to make a success of it.

Read on to discover:

- What marketing operations is really like.
- If it's right for your team (and how to develop a function if it is)
- How to fine-tune your existing marketing ops function based on industry standards
- How to hire for a marketing operations role
- How to get hired in a marketing operations role.

Methodology

To put this report together, we merged quantitative and qualitative data. We conducted our second annual survey of 270 B2B marketers and analysed year-on-year trends. We ran in-depth interviews with leading consultants and practitioners from diverse professional backgrounds, varying company sizes and across multiple verticals. The result is a 360° view of marketing operations, one that dives deep and provides a clear pathway for those interested in the field.

Our contributors:



Ian Bennison, marketing operations director, TMF Group



Mark Mahoney, head of marketing operations and SME Marketing, Clear Channel



Shane Redding, marketing consultant, Think Direct



Simon Daniels, marketing operations consultant, Percassity Solutions



Rebecca Le Grange, managing partner, Sojourn Solutions

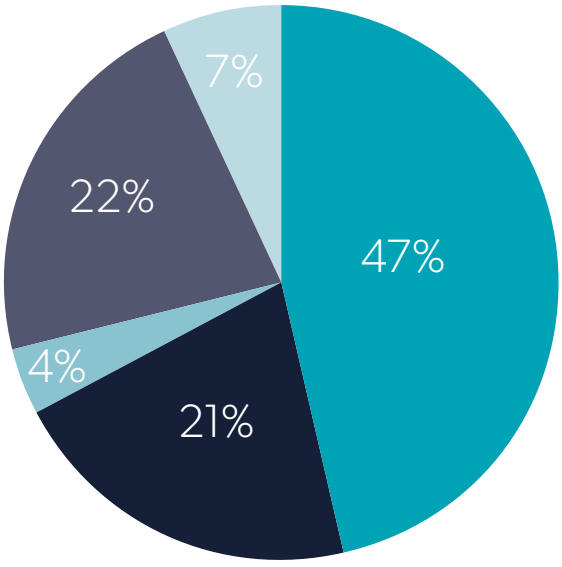
Section 2

Who owns the martech arsenal?

The ownership of martech is a grey area, largely because it's a team sport. We define ownership as the selection, development, deployment and integration of martech, and we asked our survey respondents who does it at their company. Almost half (47%) said it defaults to the most senior marketer (be that the CMO, marketing director, VP, or head of) whereas 21% have a head or director of marketing operations to do the job.

Almost a quarter (22%) of companies take a more free-flowing approach. Instead of singular ownership, they adopt a shared process with individual members suggesting martech solutions, and operating it on an ad-hoc basis. The IT department even sources the marketing technology in some companies, but they're definitely outliers.

Figure 2: **Who owns martech in your organisation?**



47% The senior marketing person – CMO, marketing director, VP, head, etc.

21% We have a specific head or director of marketing operations

4% Martech falls under the responsibility of the IT function

22% No one is directly responsible – martech investment decisions are made by individual members of the marketing team, and/or on an ad hoc basis

7% Other (please specify)

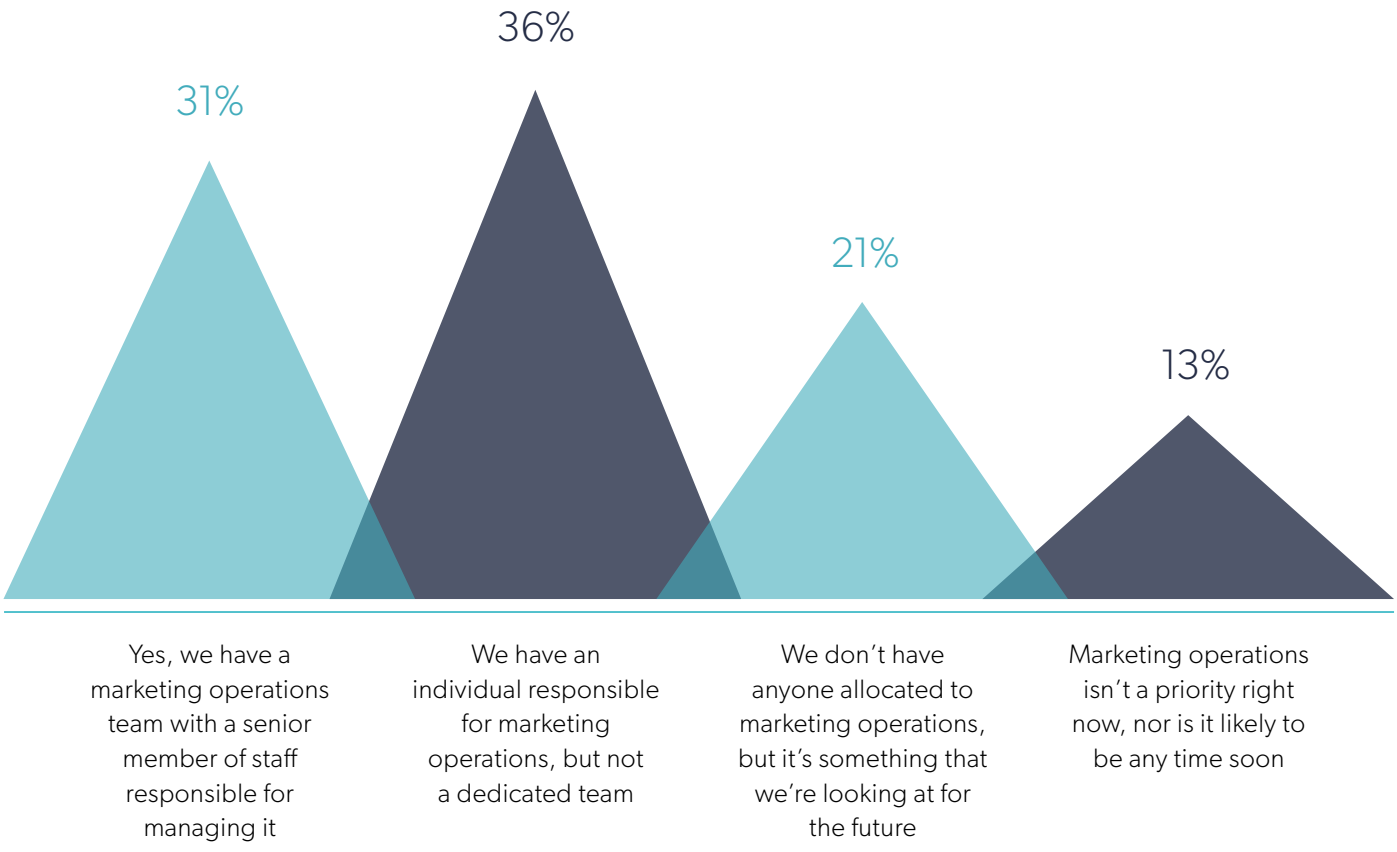
A growing army

It's interesting to note the function's growing presence within our organisations; not least because it's a perfect example of a profession that didn't exist just a few years ago. Over two-thirds (67%) of our survey respondents have in place either a whole team headed up by a lead, or an individual running marketing operations.

A further 21% have intentions of launching one soon (if you're in that number, part 4 will be of particular interest to you.) Just 13% don't plan to get involved, mostly saying their companies are too small to validate the function.

Over two-thirds (67%) of marketers either have a team or an individual specifically running marketing operations.

Figure 3: **Do you have a marketing operations function in place?**



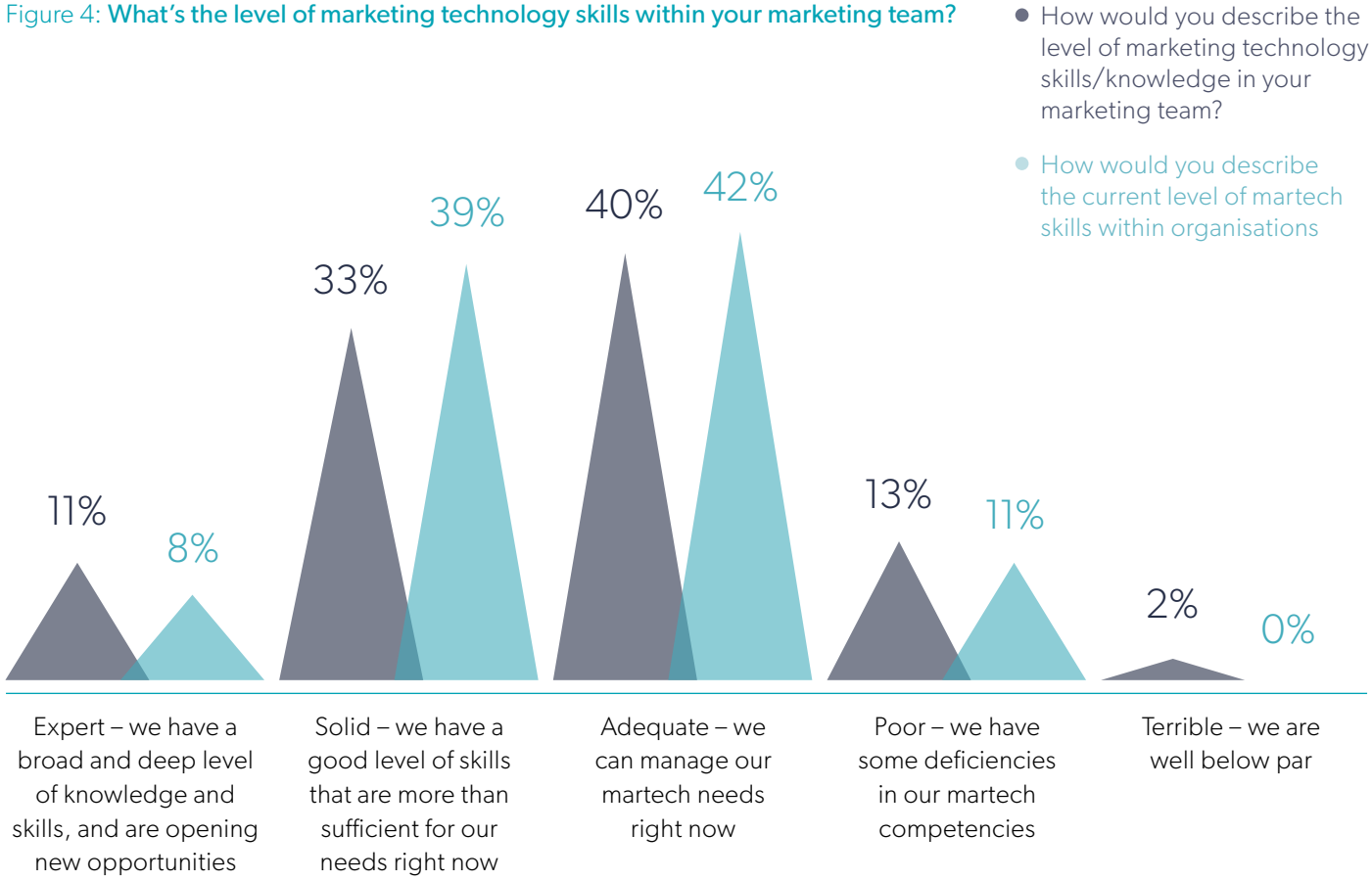
Section 3

Setting the marketing ops gold standard

When we last conducted our marketing ops survey in 2018 (***Adapt or Die? Leadership in the era of maretech transformation***), just 8% of respondents were confident enough to say their team were experts in the field of martech. Fast-forward a year and that has increased to 11%. This increase is small but significant.

It suggests a heightened alertness to the importance of martech and a better understanding of the task at hand – but clearly there is much work yet to be done. It's in that vein that this chapter explores the requisite proficiencies and knowledge for setting the gold standard in marketing operations.

Figure 4: **What's the level of marketing technology skills within your marketing team?**



In our on-demand webinar, ***Are you ready for martech?***, we caught up with a few marketing operations veterans – Shane Redding, marketing consultant, Think Direct; Simon Daniels, marketing operations consultant, Percassity Solutions; and Rebecca Le Grange, managing partner, Sojourn Solutions – to explore what good looks like.

What does good look like?

On an individual level

Doesn't marketing ops just require a digital marketing skillset? Not exactly, according to Rebecca Le Grange, managing partner, Sojourn Solutions: "They make a good starting point, but the best marketing ops people will have a holistic view of any challenge they're up against." This isn't just from a marketing standpoint, but the implications for the entire business. "It's that ability to hold all of those in one view that helps marketing figure out a solution and then execute it."

Good looks like a swiss army knife. It's someone who understands not just digital marketing, but also sales, IT, operations, finance – the entire committee of stakeholders.

Don't miss our on demand webinars:

What's the Secret to Marketing Operations

Are you ready for marketing operations?

On a functional level

The marketing operations function sits within the wider marketing team, because it's all about making the latter more efficient and effective. Simon Daniels, marketing operations consultant, Percassity Solutions outlines the six areas successful marketing operations teams focus on, pointing out that it has to start with strategy; "liaising with marketing leadership to understand the vision and then aid that through creating efficiencies."

"Strategy is the bullseye of the target – the following are the spokes surrounding that bullseye," he shares.

1. **Customer:** Assist the entire marketing team in creating the optimal customer experience.
2. **People:** Advise on the team structure and enable those team members by identifying skills gaps, documentation and training.
3. **Process:** Build methodologies to align how marketing works and collaborates with other teams such as sales, digital, IT, and finance.
4. **Tech:** Working with IT and marketing to select, deploy, adopt and optimise martech.
5. **Measurement:** Metrics around campaign performance, revenue generation and operational efficiencies. Often marketing ops teams will have remit over the budget too.
6. **Data:** Underpins all the other pillars because unless a company has a solid foundation here, its results will always be mediocre.

On a practical level

Executing in these areas doesn't necessarily require huge investment and an army of bodies. Remember, the principle of marketing operations is to increase efficiency and effectiveness.

Shane Redding, marketing consultant at Think Direct, explains further: "[Marketing operations teams] can be quite lean, I know many companies that have one or two people who act as the glue between all the other stakeholders – not just sales and marketing – but the data protection officer (DPO), wider operations and IT too." The practicalities of launching a marketing operations team will depend on the structure and culture of your business and the wherewithal at your disposal.

On a measurement level

Any marketer worth their salt understands the importance of showing their workings and proving their worth. So let's look at KPIs.

- Are they in line with your company goals and values?
- Are you presenting quick wins back to the company as well as delivering on BAU?
- Are you really measuring the metrics that matter?

The chances are, yes and no. When it comes to the world of data, cleanliness is important but quick wins matter too. Here's a bullet proof list of KPIs to measure against your marketing operations function – you can pick and choose from these depending on your company goals.

1. CPC (cost-per-click)
2. CPA (cost-per-acquisition)
3. Completed and recorded form competitions
4. Validity of email addresses, phone number and mailing address
5. Age of data. (As data ages it decays – we typically turnover 25-30% of individuals in a B2B database. So a third of your lists can go out-of-date every year!)
6. Email bounces

6 essential daily tasks for marketing ops teams

High performance marketing teams are goal orientated, but it's essential to keep on top of the tasks at hand. When you peel back the layers to look at the practical day-to-day duties of the function, it's clear why there's so much emphasis on stakeholder management. Shane outlines the six main tasks the function is responsible for:

1. **Data quality and flows:** Primarily between marketing and sales, but some will include the sales ops function.
2. **Ownership of processes and procedures:** Especially for lead flow.
3. **Ensuring systems are set up and adhered to:** This is about efficiencies (saving time and money) and effectiveness (increasing results, performance and revenue).
4. **Measurement and dashboards:** Ensuring the needles are moving.
5. **Investigating, selecting and onboarding new ways of working:** This includes systems and tools to aid effectiveness and efficiency.
6. **Stakeholder engagement and communication:** Acting as the go-between for marketing, sales, IT, finance and other involved parties.

A quick win

Do a few of those KPIs seem pretty basic? Sure if an email bounces, it's invalid – but many marketers don't do anything about it, so Simon gives a top piece of advice: "Take a list of data and sort it, the bad stuff will go to the top and the bottom. You can then set about fixing it and measuring the improvements. It's not scientific or scalable, but it's one way to get a sense of what you're up against."

Section 4

Moving forward with marketing operations

If you're starting to wonder whether you should be launching a marketing operations function but reckon your four-person marketing team might not need it, think again. The tipping point isn't size or spend. Shane outlines the five key signs that scream "get a marketing ops function right now".

5 signs you need a marketing operations function

1. You've invested in marketing automation but aren't getting the promised return
2. You've got lots of data sitting in different siloed systems and are struggling to get a single customer view
3. Marketing is reliant on data in CRM and it's not cutting the mustard
4. You're aiming for high growth and to scale at speed using the best tech to support you
5. CX is high on your company agenda and you want to design better customer journeys

If two or more of those strike a chord, then you should launch a marketing ops function. Here's how.

How to hire marketing ops talent

Building the marketing operations function must be a people-first approach, and as we've learned from our interviews above, ***it takes a certain type of marketer to pull it off***.

We asked Shane Redding to give her take on what to look for in terms of talent. So before haggling salaries, start dates and sending over offers, look for these six attributes:

1. Excellent project management skills
2. Attention to detail
3. A whole picture viewpoint – like a business analyst
4. A love of data
5. Inquisitiveness – they always start with 'why'
6. Excellent communicator and stakeholder manager

But perhaps this guide has made you want to take the role yourself. Here's how to do that…

How to get a job in marketing operations (and fast-track your career)

Like every good marketing ops practitioner, let's start with "Why?".

Other than riding the wave of marketing technology and becoming a pivotal player in the business, ***marketing operations has been touted as a route to the top marketing job*** – that of CMO.

Simon believes that marketing operations professionals can flourish in any company that "has a focus on marketing and delivering value for the customer and the organisation". Nowadays, that's part and parcel of any good business.

Psychoanalyse yourself

No, really. Start by taking a free psychoanalyst test and see if you're cut out for the role. Shane explains: "If you can match your personality type with a career path, then you're pretty guaranteed to fast-track your career."

If you're made of the right stuff, it's time to go a level deeper and work out where in marketing operations you'll be more fulfilled because, as Simon points out, "marketing operations is broad." In fact, he's identified three types of professionals to help you think about which route to take.

1. **The technologist:** Will you thrive off marketing automation – identifying requirements for it, selecting solutions and managing them

2. **The data enthusiast:** Is the data itself of more interest – managing data quality and wider data governance?

3. **The analyst:** Does the digital execution and management side turn your crank?



Learning the hard skills

In whichever you choose, there are hard skills to learn. This gig takes real business acumen – not just marketing know-how, but a deep understanding of business and the drivers of those within it. Simon suggests you start asking: "How able are you to talk in commercial terms to anyone in sales? How effective are you at talking to IT and translating that back to marketing? Think about taking courses to plug any skills gaps."

Learning the soft skills

As we've discovered in almost every chapter, the soft skills of stakeholder management and communication are equally important as the hard skills.

"Think about how you can always be open to change and brokering relationships," says Simon. "These are skills that come with practice and experience. Think about each period in your review cycle. Evaluate yourself on a quarterly or yearly basis, asking yourself which skills you can learn. How can you become better at relationship-building, be more open to change and adaptable?"

Section 5

Meet the marketing operators

'Method acting' is a technique adopted by some actors to help them give sincere and emotionally expressive performances by fully inhabiting the role of the character. The logic being that there's no better way to learn a role than to live and breathe it. This chapter is "method marketing" – we're honing in on the lives of the people leading the way in marketing operations.



Ian Bennison, marketing operations director, TMF Group

How would you describe what you do?

I see my role as the glue in a global marketing team. Having built a team of marketing operations specialists, I ensure the wider marketing team is fully supported and their requirements are fulfilled.

What are your roles and responsibilities?

I manage the global budget and financial reporting as well as the global martech strategy and roadmap. I also manage the data team, ensuring we're fully compliant and have a clean and segmented database. The digital team sits in my area too, managing global PPC and LinkedIn. I own research and insight, reporting and analytical requirements. I'm also the interface with other key functions including sales, IT and finance. Until recently, I ran the client listening programme too.

How did you get into marketing operations?

I previously worked with the CMO but in a sales operations role. He invited me to join as he recognised the value I could bring.

How has your role evolved since you started?

It's changed as the team has grown and needs have changed. When I arrived, we had no data strategy and no

martech to speak of, so I created capabilities when the time was right. We also had a digital team, which was folded into my team 18 months ago.

I think the way the function has evolved has been a surprise – it shows there's a need for it in a modern marketing team and that deploying things with structure and process is cost effective, it increases consistency and productivity by creating specialist functions.

What are the biggest challenges in your job?

I don't really feel I have many blockers, it is all about delivering to your stakeholders and showing that it makes the marketer's role easier.

The challenges with finance and IT don't go away, but I can funnel them through a single point, understanding their language and processes.

What lessons have you learnt so far?

Understanding stakeholders' needs and delivering against them is essential, but you must also implement processes and have a strategic direction. It's too easy to revert to being tactical, you need a vision and a roadmap to make true improvements.

What advice would you give to those entering the role?

Keep an open mind, but be process driven and have a vision. If you can do that, you can overcome most obstacles. Most importantly, take people with you on that journey.



Mark Mahoney, head of marketing operations and SME Marketing at Clear Channel

How would you describe what you do?

I have two roles at Clear Channel. I joined four years ago as the SME Marketing Manager, building a marketing team to promote out-of-home [advertising] as a solution for SMEs and local organisations. As I progressed and implemented new tech to help, I established a marketing operations team. My team recommend, test and then implement martech solutions to help Clear Channel UK.

How did you get into marketing ops?

Our CMO was instrumental in this journey. He recognised how marketing ops has been growing in importance in recent years. At the same time, I was implementing tech solutions for the direct side of Clear Channel [its outdoor advertising arm]. This led to my current position, where I lead marketing operations and SME marketing.

How has your role evolved since you started?

It evolves as we improve what we have and implement new tech. Last year, [2019] was spent attempting to make marketing automation a normality at Clear Channel. We implemented Showpad in early 2019, rolling this out to field sales people across the UK. We're now implementing a social solution, and looking at how we can transform into a data-led marketing team. This year's main challenge is implementing a business intelligence tool - not easy when you have legacy systems in place.

What are the biggest challenges?

Implementing technology. This may sound controversial – but it would be really helpful if tech companies (and there are some good ones) were completely transparent. Every tech company suggests their solution

is super simple to integrate and it very rarely is. I'd also like tech companies to be honest with upfront costs. It makes life so much easier when putting together a business case.

Reporting is another huge challenge – especially when, as mentioned above, there are legacy systems in place, which are tricky to adapt. Another area is stakeholder approval. This is so important because marketing ops works across many different areas of a business. How and when you involve stakeholders is vital.

What lessons have you learnt in your time in marketing operations?

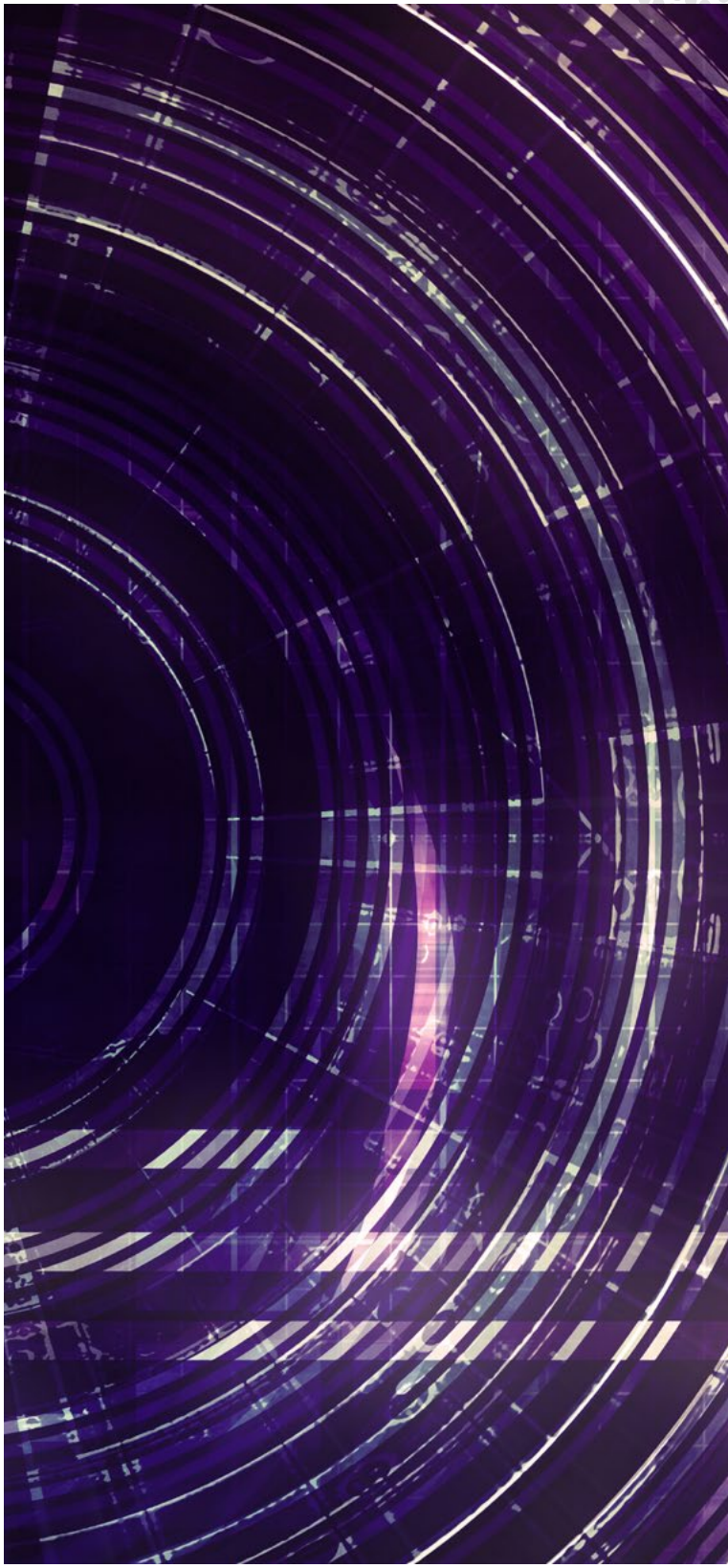
Ask suppliers a lot of questions throughout the process and make sure you have access to support. A question that stands out is one I heard at B2B Get Stacked Marketing Conference in 2019: ask the supplier what tech they use to help with their tool. Also involve key stakeholders in the decision-making process from an early stage. You'll see from their reaction whether it's worth pursuing.

Don't expect everything to work seamlessly. Spend time working through why you want a piece of tech, what solutions it will provide and the benefits for its users. Also, be patient. I started speaking to Showpad in 2014, changed organisations and finally implemented this tool in 2019.

Invest in continual training for you and your team. Constantly think of how you can upskill yourself and your team. It's simply not good enough to expect people to learn some of the systems they will have access to without quality and consistent training. The key is not to give up, and to have smart people on your team who have certain characteristics - like curiosity, determination, perseverance and patience!

What advice would you give to those considering the role?

Be patient, curious and don't expect everything to be perfect. Go for it, it's a fascinating role. You'll be constantly learning and adapting.



Section 6

A final word

With 93% of B2B marketers understanding the importance of marketing operations in delivering digital transformation, it's clear which direction of travel the function is headed. But through all the noise and best practice advice, ultimately it comes down to two things: making marketing more efficient and effective.

This guide has outlined how to sidestep the pitfalls and overcome the obstacles that face those venturing into the space – whether that's building a team or getting into the role yourself. While many of us are just getting started with marketing operations the data suggests we're gradually growing in confidence.

DevOps changed the game for product and engineering teams. Sales ops soon followed suit. Now, as the delivery of customer experience, branding, and pipeline falls firmly on the shoulders of marketing, marketing ops is next in line. This year will perhaps mark the last call for early investment into the field of marketing operations, so now's the time to get ahead.

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