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B2B Marketing

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Adapt or die?

Leadership in the era of martech transformation



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Executive summary

B2B organisations are under pressure to transform. Markets are being disrupted, buyers' preferences are changing, and new marketing techniques are emerging every day.

It's crucial that B2B marketing leaders have a clear vision of how that transformation will impact them, including a plan and an assessment of the skills and resources needed to achieve it.

In this report, and through both qualitative and quantitative data, we'll examine the extent to which B2B marketers are prepared for this transformation and how to tackle it.

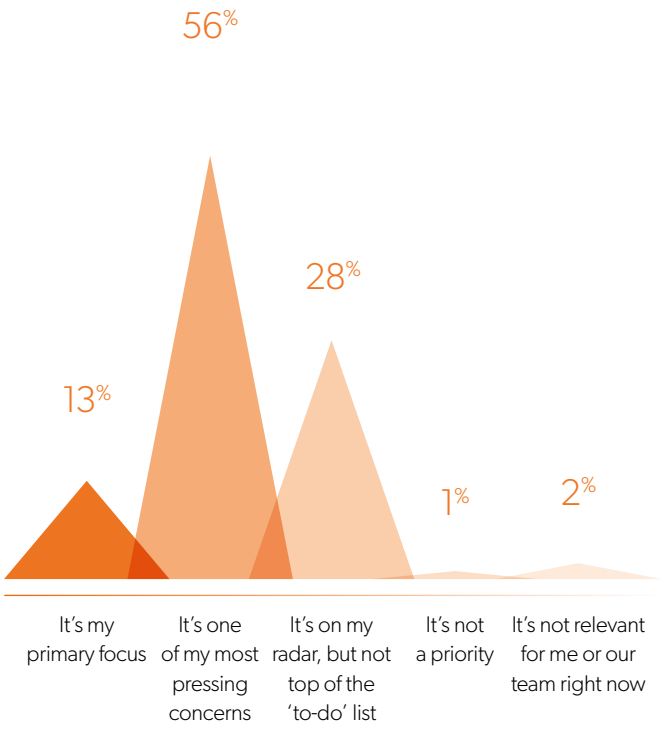
In particular, we'll look at the role that technology is playing in driving and enabling change, plus the nature of resourcing that marketing leaders must allocate to it.

Transformation: Now's the time

Transformation is a top priority for 70% of the people we surveyed in this report.

However, our interviews revealed that most marketing leaders are uncomfortable with that word. They associate 'transformation' with standing at a cliff edge – a kind of do or die situation. Instead, most B2B marketers (and here they may differ from B2C) describe themselves as being in a state of rapid evolution.

Prioritisation of digital transformation



Transformation readiness: Skills, structure and setup

Marketing operations is the compass and guide for this journey. Many companies have already invested in this role, but far from all. Those who haven't are likely to be compromising their ability to deploy martech and conduct more effective digital marketing.

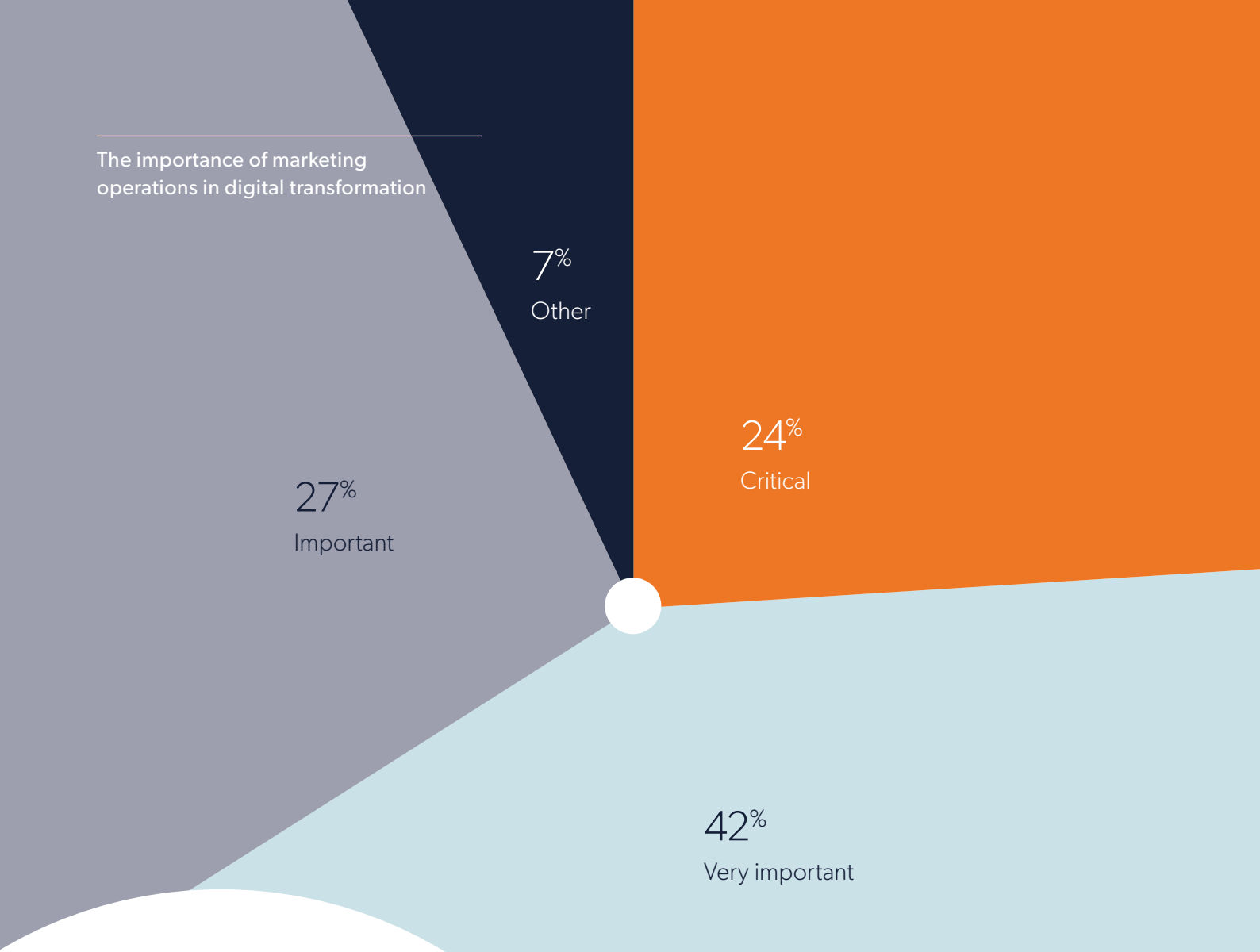
The majority of organisations feel their martech competencies are insufficient for the mid to long-term. One in ten believe those skills don't even match today's requirements. The primary need is to improve skills in data management and analytics, plus measurement and reporting.

Breaking down the barriers: The growing role of external martech expertise

The majority of companies use third parties as part of their martech development and management, but the mix of organisations deployed is changing. Furthermore, given the small talent pool for martech-experienced marketers, and the reluctance of some boards to invest in a larger headcount, the challenge is to accelerate change through better use of external resources.

This means the growing use of martech is both an opportunity and a threat to agencies. In some instances there is potential to run a client's core martech platforms as an outsourcer, in other cases they could be cut out entirely as those tasks are brought inhouse.

The importance of marketing operations in digital transformation



Marketing operations is the compass and guide for this journey



Budgeting for martech in the digital age

Martech and digital transformation are impacting the role of B2B marketing leaders, including how they engage with the company's wider executive team.

Significant martech implementation presents different implications across the company. Greater collaboration with others is just one part. The most crucial is budget – especially as martech presents different implications for budgeting than non-digital strategies.

For 70% of respondents, investment in martech is rising. That may mean reshaping your relationship with the CFO.

CMO and CIO: Partnership, not takeover

As the importance of martech grows, the relationship between the marketing and IT functions has come under tighter scrutiny.

In smaller organisations, IT often leads key tech projects that relate to marketing and sales, although this is generally not regarded as ideal. In larger companies, IT plays an active role, but it's beholden to the marketing leader to cultivate a productive and mutually beneficial relationship with the CIO.

In either instance, it's not as simple as 'the CMO buys the tech' – an argument some of the leading vendors would have us believe.

This is important to note, because where marketing and sales can align in their tech requirements, they are more likely to get what they want.

Section1

Introduction

It's been said loudly and often that B2B marketing is in a state of transition – so much so, that most marketers have come to accept change as the new normal.

The role of marketing technology (martech) as both an enabler and driver of change is well and widely understood. New forms of digital marketing engagement, mixed up with evolving buyer expectations, have created a 'what's next?' culture. Many B2B brands are in an unprecedented rush to embrace the latest channel, platform or communication trend. The days when B2B brands' approach to innovation was best described as 'glacial' are long behind us.

To date, however, many of the changes that we've seen in B2B marketing have only gone so deep. They've often focused on what you might call the 'front-end' of marketing – in other words, the messaging, what that message says, which channel it uses, and how the audience receives it. You could call this the 'what' of this new form of marketing.

Meanwhile, far less attention has been applied to how this marketing is enabled, and who is executing it. Most discussions on digital transformation and martech are dominated by the vendors and focus on the hype associated with various platforms. The challenges of deployment, integration and management receive much less airtime, either in the context of third-party experts, or the implications for the internal marketing team, its skills, attributes, structure and leadership.

Some B2B organisations have progressively and proactively re-engineered their marketing functions, reskilling their marketers to enable transformation and facilitate effective use of martech. Yet most lag a long way behind. Many have not embarked on the transition, or even scoped it. Such companies are likely to be putting themselves at significant competitive disadvantage, which will become more acute as disruption in their markets increase.

This report will explore the nature of this transition across B2B marketing, the extent to which it is understood and being acted upon, and the implications for marketing leaders. Where transition has stalled, or not even started, we wanted to understand why. We've asked what's holding marketers and organisations back from grasping the nettle and embracing this change.

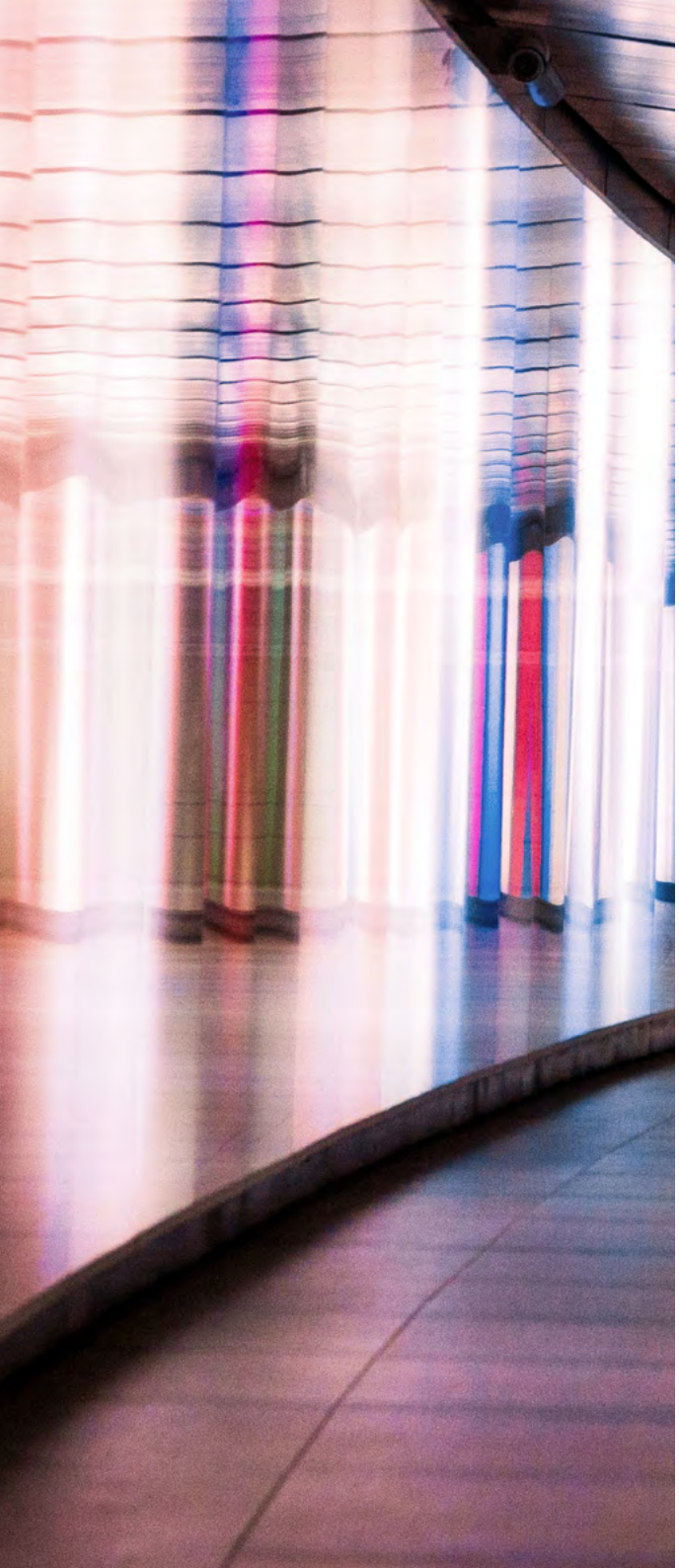
We wanted to show how marketing leaders in different scenarios are tackling this common challenge, and the lessons they're learning along the way. Finally, we'll use this collective wisdom to provide guidance on how to address these challenges in the future.

Methodology for this report

In order to provide the most balanced picture, this report is based on both qualitative and quantitative research. We surveyed our audience of over 100,000 B2B marketers and conducted in-depth interviews with marketing leaders in B2B firms of a variety of sizes, and operating in a number of different verticals.

The marketers interviewed for this report were:

- **Jon Burke,** director of marketing, Grundfos
- **Catherine Dutton,** VP marketing, Atos
- **John Kerr,** director of marketing and commercial excellence, Armstrong World Industries
- **Annabel Rake,** CMO and partner, Deloitte UK
- **Simon Rusling,** partner and head of marketing, Barnett Waddingham
- **Melanie Thomson,** head of marketing, RM Results



Section 2

Understanding the transition

In order to understand the nature of the transition B2B marketing is currently undergoing, and what it means for marketers, it's useful to pause and consider what's been left behind.

Pre-digital marketing looked very different in terms of its structure, purpose and use of technology, as figure 1 shows.

In essence, the transition is enabling better use of digital marketing, both separately and in collaboration with offline tools and channels. But there was no single moment, or definable period of time, when B2B marketing formally became a digital discipline. Certainly no one woke up one morning and said: "Right, as of today, we're all digital". Some aspects of marketing will transition faster than others – some have been digital from their outset, others only started the journey this year.

Figure 1: Marketing in the pre-digital and digital ages

	Pre-digital	Digital
Brand	Centralised command-and-control approach to branding, owned by the board and regimented by PR, corporate communications and print advertising (at least in larger organisations).	The brand is democratised, owned (to a greater or lesser extent) by employees and customers. It is driven, enabled and monitored by social media.
Marketing communications	Focused on one-to-few communications with prospects, largely via direct mail, although sometimes with email and print advertising support. Driving footfall to event stands was typically a significant responsibility.	The rise of inbound, plus demand generation and (more recently) ABM determines the nature of activity. There is more emphasis on 'always-on' programmes than seasonal campaigns. It is driven from in-house teams to a greater extent.
Marketing technology	Progressive organisations had a CRM platform (although this was far from universal), and an email management system (enabling batch-and-blast campaigns).	Building, managing and developing an integrated 'tech-stack' is an increasingly critical part of marketing's role, with CRM ubiquitous, marketing automation and social listening increasingly default.
Marketing data	The challenge was data accuracy. Negatively impacting this was the high churn rate of marketers, limited options for database renewal, and the need to minimise wastage from inaccurate DM campaigns.	Escalating buyer expectations including greater personalisation and insight, not just on individuals but entire buying and influencer groups.

Marketing agencies	Clear delineation and demarcation between clients and agencies, with the latter group often seeking to obfuscate the creative process to justify their billings. Agencies quicker to understand and deploy new digital formats, and clients relied on these.	Far greater emphasis on collaboration and shared projects. Martech enables and requires greater clarity and transparency of operations. Two potential extreme scenarios: 1. Agencies less involved in execution, more on creative development, 2. They act as a complete outsourcing solution for martech-enabled programmes.
Marketing insight	Focus groups, telephone research or email polls were the only options, mailing insight on customers or markets difficult and expensive to attain, and slow to act on.	Focus on CX brings customers much closer to the business, plus martech platforms enable quicker, deeper and broader insights on behaviour and preferences. Speed of change requires rapid response to customer behaviour.
Marketing and sales alignment	Typically poor or non-existent, with limited mutual understanding or willingness to co-operate, let alone robust processes to enable this. Sales has more clout at board level.	Demand gen and more recently ABM have created new contexts, requirements and structures for collaboration, and shared goals. Silo-based working is no longer an option. Partnership is the aspiration, if not reality.
Marketing budgets/teams/ organisation	Organised around intensive use of agencies (sometimes multi-agency teams), low use of technology, and relatively finite internal teams, with limited responsibility for campaign delivery. From a budgetary point of view, marketing was managed as an operational expense, with little or no justification for capital investment. This defined the nature of the discussion with finance.	Growing reliance on martech enables and demands more in-house marketing execution, with consequent shift in agency engagement. In-house teams enhanced and upskilled as a consequence. Greater reliance on the marketing operations function to enhance departmental effectiveness – particularly around tech. Shift in basis of marketing expenditure demands realignment of CFO relationship towards Capex away from Opex.

Key things to take from Figure 1:

- It's clear that the migration to digital, at whatever speed, has had profound impacts on the nature of B2B marketing, in every aspect and at every level.
- It's also clear these various factors are fundamentally intertwined, with changes in one having profound implications for another.
- Finally, it's clear technology is both a key enabler and driver of these changes – it's central to the whole process. You must enable technology to enable transformation, and the lynchpin of enabling technology (as we'll discover within the report) is the marketing operations function.

Given that most marketers acknowledge change will continue to define their environment, the challenge is preparing and enabling this inevitable transition.

In the sections to come, we'll examine how marketers can prepare for this, with a particular focus on the technological requirements and what success may look like. We'll examine the structures and resources (both internally and externally) that are in place to enable effective deployment and use of technology, plus how these are likely to evolve in the future.

You must enable technology to enable transformation, and the lynchpin of enabling technology is the marketing operations function

2.2 What do we mean when we say 'transformation'?

The word 'transformation' means different things to different people; some prefer to describe the change they face as a continuous 'evolution'. Regardless, everyone agrees that things are changing and they're changing fast.

> "We don't have a transformation going on – our approach is more about evolution. Transformation by definition is something that can only happen once. We are continually looking at the marketing structure and use of technology."
>
> **Annabel Rake, CMO and partner, Deloitte UK**

> "I see it as an evolutionary process, but it depends on which aspects of marketing you're looking at. If you're talking about moving brochures into an online environment, it doesn't require a transformation. Marketing is going through an evolution, but it's a fast-moving evolution."
>
> **John Kerr, director of marketing and commercial excellence, Armstrong World Industries**

"We are always in transformation, whether it's digital or not. For example, we're just about to switch to a new marketing automation platform. This is fundamental to marketing – getting us the right metrics, so we understand what's working. We don't have a big team, but we are transforming all the time. We are always trying to understand the right thing to do. For others, it might be too big a concept to deal with.

Is it transformation or evolution? You could call it something different, but that's just semantics. Sometimes people believe it has to be something on a bigger scale, involving the whole organisation, but not necessarily."

Cat Dutton, VP marketing, Atos

"There is an ongoing element to our transformational journey as new tools and technologies become available. But there is also a project to get us to the best position. After that, it's about topping up – platform evaluation etc. There's a cultural shift required for this, in order to ensure we stay on top of things."

Jon Burke, director of marketing, Grundfos

"I prefer to see it as evolution. Transformation is about a cliff edge, where there is a specific date and you need to get on with things to meet that date. For example, with AI, discussion has been trickling through little by little. With email, we have been getting a little better year by year. It will continue to evolve. I feel the services sector is slower to move on these things. The industry is just exploring automation, while in the tech sector they are already pulling back, having trialled it. They jumped in far quicker. We take smaller steps."

Simon Rusling, partner and head of marketing, Barnett Waddingham

Is this just British modesty on display? Would the answer be different if we posed the same question to a group of US marketers? Perhaps our respondents are seeking to manage expectations (both theirs and ours)?

It's likely that the answer to all of these questions is 'yes'. But given the lengthy decision-making process (which involves budget allocation, implementation and planning), it also reflects the speed at which marketers are able to drive the kind of changes required for martech.

Comment from Clarasys

Transformation vs evolution

I find the practical tone of evolution over transformation reassuring. Far too often, large transformation plans fail in an all or nothing way. However, it might be interesting to look at the challenges of martech from the perspective of two different objectives. Both, I believe, require different approaches.

1. Customer centricity – changing the way we interact with customers throughout the customer lifecycle, not just in one phase. We know customers want to interact with us in a more customer-centric way and we know the technological capability exists to do this. The era of clunky experiences and poor handoffs should be a thing of the past.

2. Marketing enablement – enabling the marketing organisation to deliver on the customer's needs (and the rest of the organisation's resultant needs). This report highlights the expanding skillsets required of marketers.

To be successful in these objectives, you must have a clear vision. This should be a succinct description of the customer experience, taking account of product, geography and customer segmentation, as well as the capabilities you need to get there.

Next, it's crucial you are able to sell your vision to the rest of the organisation.

Here's where I think there might be an inflection point. To successfully, sustainably and continuously deliver on customer centricity, you have to get marketing enablement in place rapidly. Without a vision from the outset, it's very difficult to be sure you're going in the right direction.

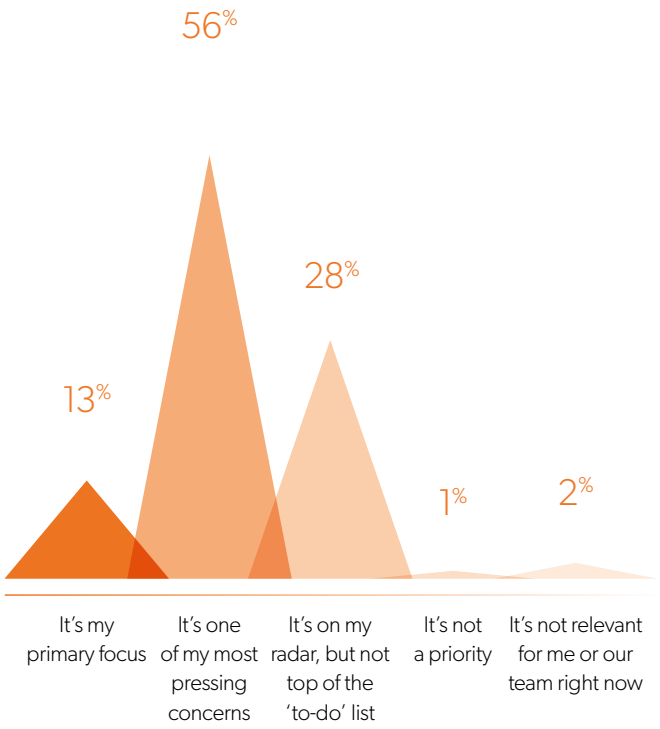
It may mean hiring, partnering, reorganising and resetting relationships with stakeholders. To me, this feels like a transformation and requires a committed plan to give your people direction and reduce uncertainty for everyone.

With marketing enablement in place, evolving and iterating your vision of customer centricity becomes easier and more likely to succeed - the Agile marketing model, some would argue, is established.

2.3 Prioritisation of transformation

From our survey, the importance of transformation is pretty clear – just under 70% of respondents regard it as either their number one priority (13%), or one of their most pressing concerns (56%). Given the level of hype surrounding digital transformation, it might be expected that the number citing it as a top priority would be higher – it seems likely that pragmatism has played a role in pushing this number down and in setting expectations.

Figure 2: Prioritisation of digital transformation



How high is transformation on your agenda?

"I see transformation as being about two very different areas. The first is output, for example running physical events or webinars, print versus interactive formats. The second is automation, which involves removing manual processes. Both of these are very high up my agenda. In professional services, companies cling on to things. Partners like to be in control – they don't like handing things over. But this is changing now; we are seeing this all over the market. They are being influenced by what they might expect in their personal lives. Now we are really trying to push the envelope. For example, we're taking the decision about what format to use for client communications off of them. We're not even giving them options to choose.'

Simon Rusling, partner and head of marketing, Barnett Waddingham

"I've been in my role for three months – transformation is very high on my priority list, probably the second highest thing. Currently we're doing digital well, but it's not optimised. I was aware before I arrived that it is an issue, but not all of the detail. I'm not daunted by it, but the challenges are greater than I was anticipating. The size of the task is similar to what I did before, in my previous role. It will take time, effort, coaching and tools to put it right."

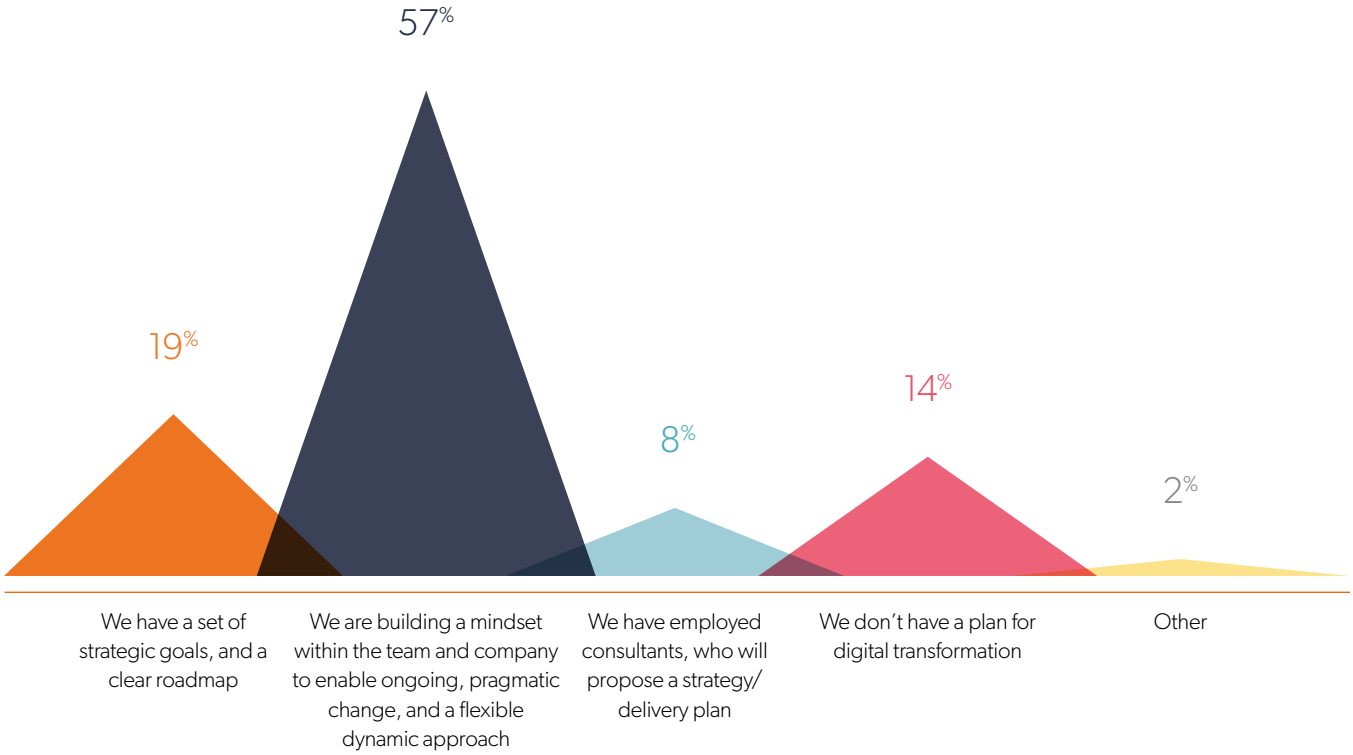
Jon Burke, director of marketing, Grundfos

2.4 Approaches to digital transformation

In terms of methodologies, there is a strong bias towards a more iterative, consensus-driven approach to transformation (57% of respondents), rather than a pre-defined, visionary approach, more likely to be led by one individual or team and have a set timeline (19%). Again, this highlights an approach built on pragmatism and may reflect collective decision-making and collaboration between different functions. It may be more likely to succeed as it allows different stakeholder input. Conversely, a lack of clear direction may make it more challenging to gain momentum and achieve success.

Just under one in ten respondents have outsourced responsibility for transformation to consultants, while a further 14% have no current plan on how to move forward with it.

Figure 3: Current approaches to digital transformation



2.5 The importance of digital transformation on operational and personal success

In total, more than three-quarters of marketers believe that digital transformation will be critical or important to the success of themselves and their organisation.

However, many more feel it will be critical to their career than rather their business (24% versus 9%). The message here is clear. Marketers believe they are more likely to benefit from the success of digital transformation in terms of their career progression or opportunities. Yet its impact can cut both ways. Involvement in an unsuccessful transformation project may negatively impact personal success, or the potential thereof.

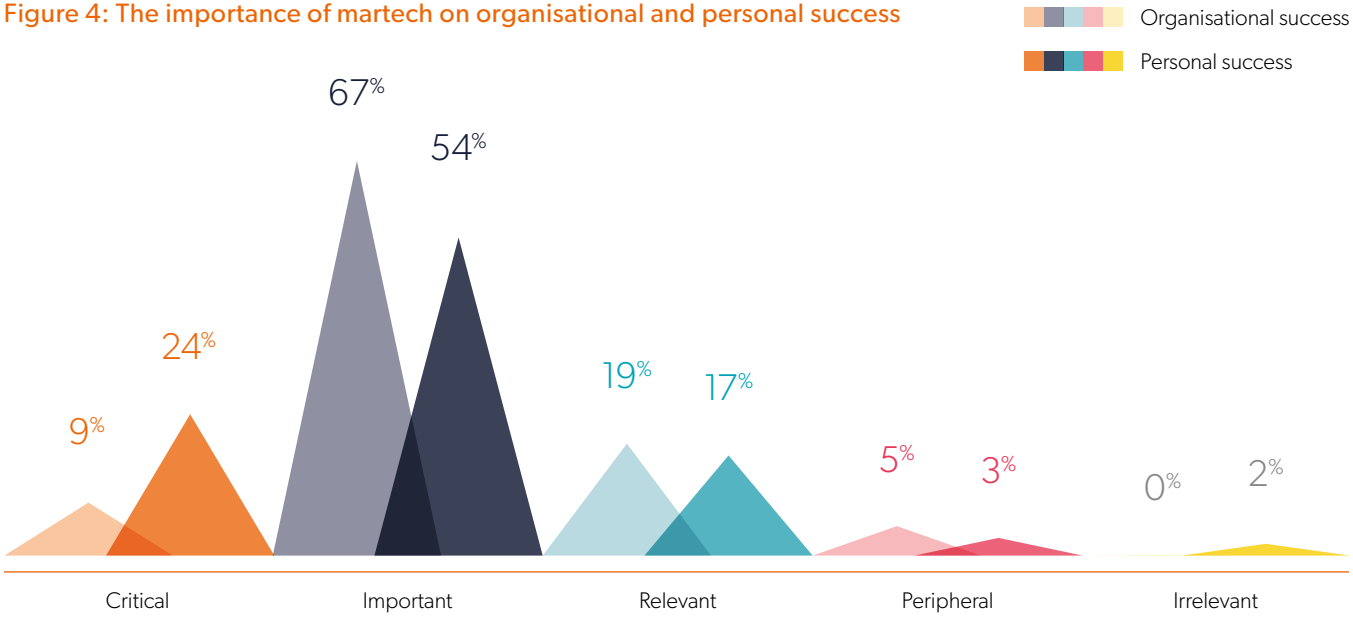
"Martech is very important, and it will only increase in importance."

Melanie Thomson, head of marketing, RM Results

"We're developing centres of excellence in our marketing team for things like marketing automation. Martech is a fundamental underpinner and enabler of marketing. I don't want to underplay the role of martech, and we need to ensure it is working at an optimum level."

Annabel Rake, CMO and partner, Deloitte UK

Figure 4: The importance of martech on organisational and personal success

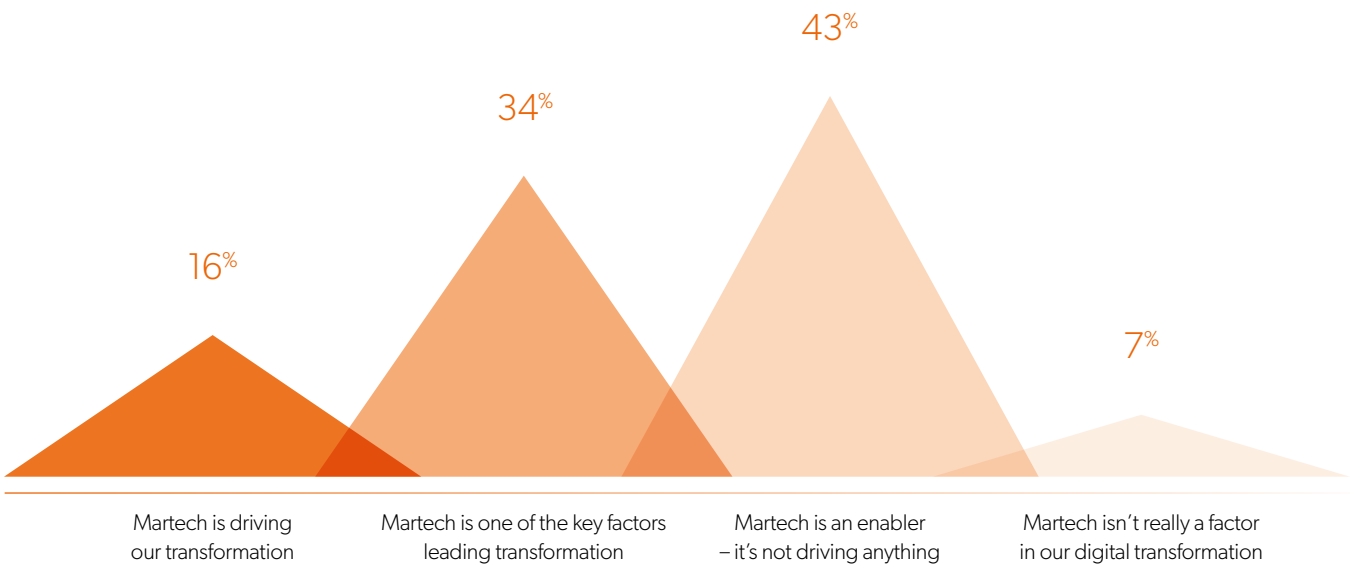


2.6 Martech development as a driver of transformation

The response to this question revealed a clear rift in opinion among marketers. Some regard developments within the martech landscape as the driver of transformation, others regard the platforms and applications simply as enablers. The largest single group (43%) view martech just as an enabler. However, 50% believe martech is either the single most powerful driver of change, or one of the biggest drivers.

It's clear that both groups are right – martech can be, and typically is, both an enabler and driver of change. It drives change because the vendors and associated consultant community are very good at evangelising the potential of the platforms they work with. They are excellent at marketing, and it's hard to imagine that their message will not have resonated with B2B marketing leaders (albeit perhaps not on a conscious level). At the same time, other marketers are quite justified in regarding martech as purely the enabler – any decision to implement technology should be based on sound business rationale, although we know it is human nature to be excited by new things, with potential to enable greater success.

Figure 5: The importance of martech in driving and enabling transformation



43%
view martech just as an enabler of change

"It's our go-to-market strategy that is driving the tech stack, it's not being reactive to external events. We are further ahead in terms of using our core communications technology such as marketing automation and social. Now we're looking at how we use technology in how we work internally, and how we drive campaigns to be more effective."

Annabel Rake, CMO and partner, Deloitte UK

"It matters a great deal to keep pace. I enjoy speaking to other marketing leaders about what they are doing, what the new trends are. I need to do more of this. But it's important not to be seduced by the hype. There is a classic hype curve with martech, and we need to make sure that what you implement will stand the test of time."

John Kerr, director of marketing and commercial excellence, Armstrong World Industries

"We're not changing as fast as I might like. Our challenge is to show the importance of the transformation that we want to make. The tech team is under pressure from across the business for new tech, and they need to prioritise. We need to fight our corner."

Simon Rusling, partner and head of marketing, Barnett Waddingham

"Martech is an essential driver of transformation, because in order to evolve as a marketing function, you need people to focus on the value-added stuff, not just the manual day-to-day stuff."

Catherine Dutton, VP marketing, Atos



Section 3

Internal resources

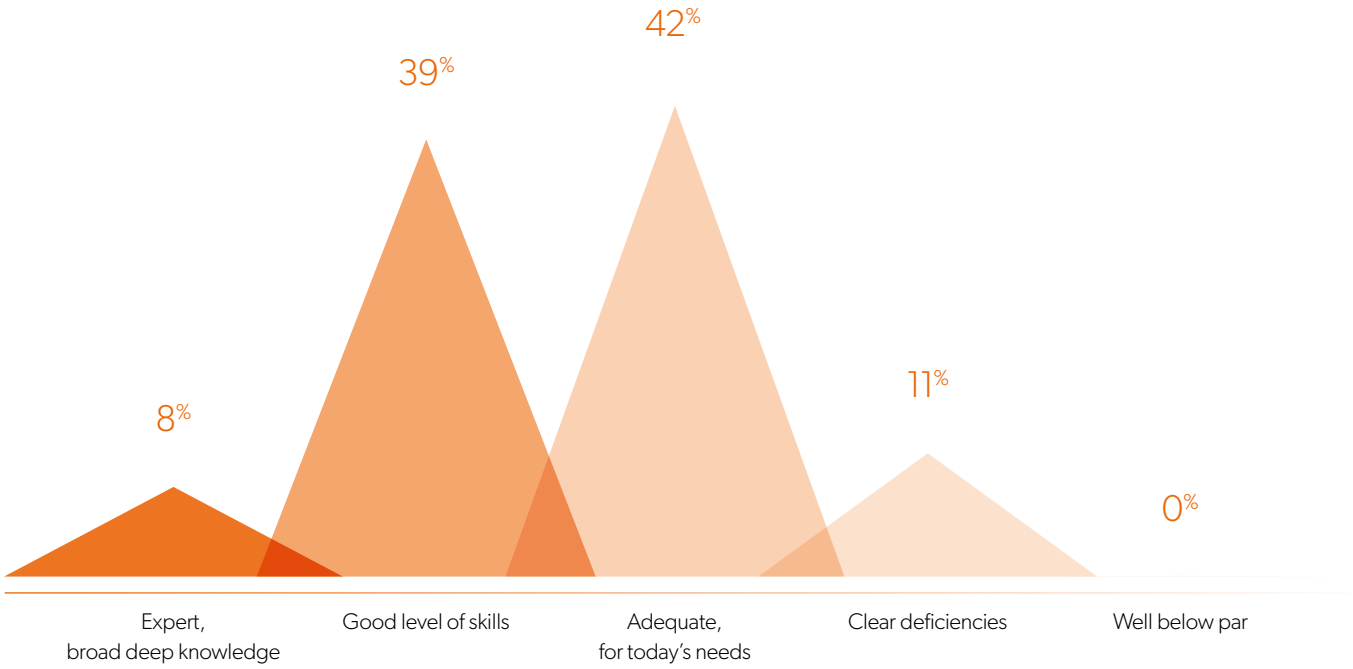
In this section we sought to understand how the digital transformation agenda is impacting the internal marketing team, plus its ability to use martech to achieve its objectives, both now and in the future. The aim was to understand changes in how internal marketing teams are structured, resourced and developed, plus the skills that these teams need to succeed.

3.1 Current level of martech skills within your organisation

The majority of B2B organisations have sufficient marketing technology skills to meet their current needs and responsibilities (89%), but most look set to struggle if these requirements grow to encompass new business objectives (53%).

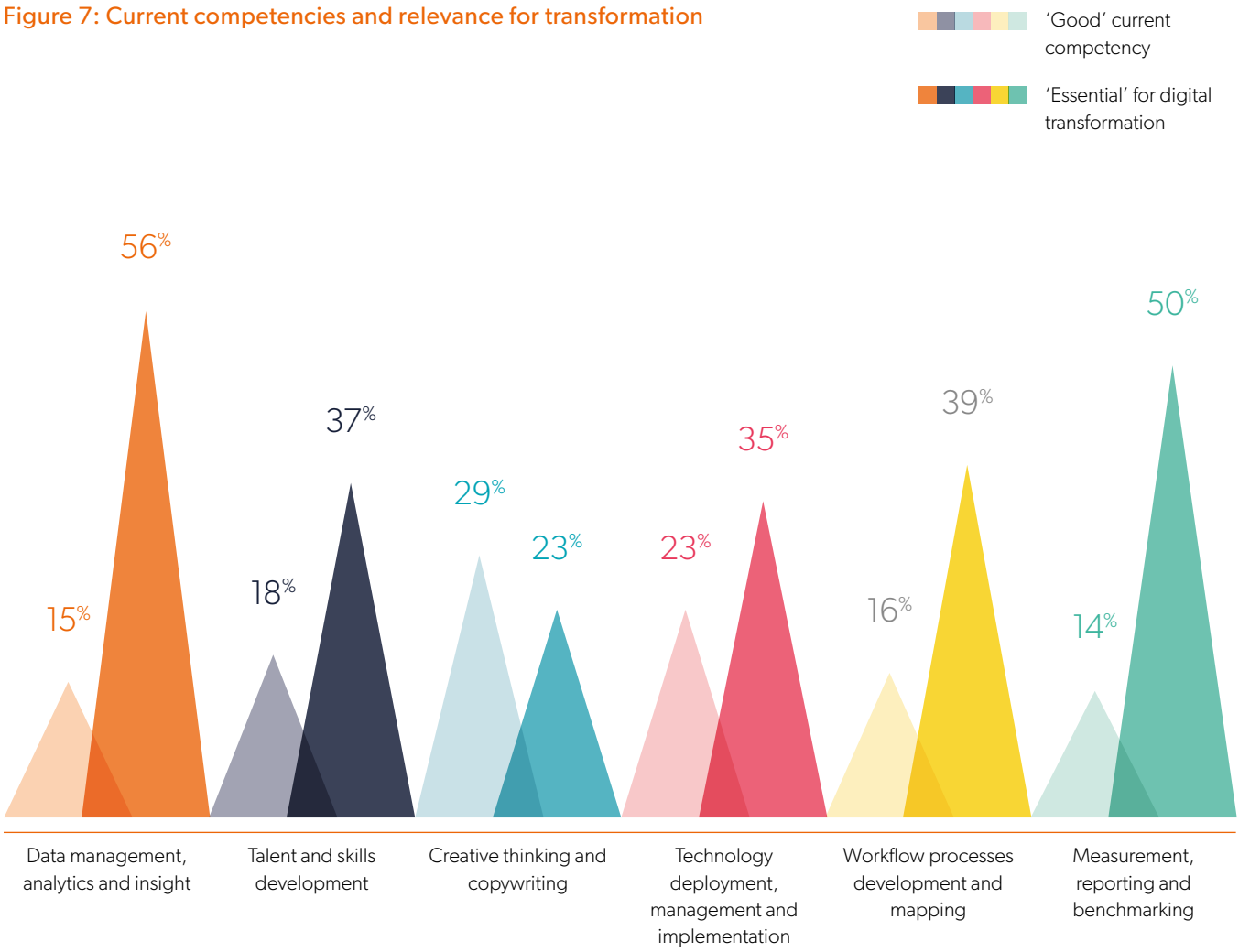
Only 11% of respondents said that their martech skills were 'poor' and not relevant to their needs today, but only 7% described themselves as having an 'expert' level of martech skills within their team. Clearly, most B2B marketing leaders need to invest quickly and decisively to bolster their martech skills.

Figure 6: The current level of martech skills within organisations



3.2 Aligning internal competencies with digital transformation needs

Figure 7: Current competencies and relevance for transformation



We asked B2B marketing leaders which competencies they see as most important to delivering digital transformation, and separately asked which those skills they feel their team are good at.

By comparing responses to these two questions, it's clear that the competencies of greatest concern are data management, measurement and reporting. While these were regarded as 'essential' to delivering digital transformation, skills in these areas are lacking. These attributes will have to improve, particularly if marketers are embarking on some form of digital transformation.

It's clear that the competencies of greatest concern are data management, measurement and reporting

By contrast, respondents were significantly less concerned about skills surrounding technology deployment, management and implementation. Although there is a gap in the skills requirement, it is far smaller than for data and measurement.

Yet this fails to acknowledge that martech solutions will enable teams to become more proficient at data and measurement. Far from undermining the importance of martech for future B2B marketing, the response actually supports it.

Finally, it's interesting to note that the area in which capabilities best match the skills requirement is creative thinking and copywriting. This is one area in which marketers are not concerned in the present, or for the future.



How have you approached the transition of your marketing team to align with the growing need for martech skills?

"We are geared around controlled transition. We no longer have a separate digital team, or head of digital. I believe all roles need to consolidate around digital in all approaches – we can't silo this. We need to ensure all marketers are stepping up to this. Create centres of excellence in which everyone in the team can draw on."

Annabel Rake, CMO and partner, Deloitte UK

"In the short term, I'm trying to ensure that there isn't any disruption. There will be enough change involved. In the medium term, I may look to bring a couple of people in to help make better use of our existing systems."

Jon Burke, director of marketing, Grundfos

"We have three different teams – think, feel and do. These cover MR, communications and marketing managers (who are like product managers in that they are technical). They all work collaboratively. We put these in two years ago and it was a distinct change. Previously, our marketers were much more specialised. People took a while to understand where they fitted into this new structure as we had done things the same way for a long time. The aim was to make the roles less flexible and to provide more structure. Now there is more ownership, and clearer KPIs. They are better able to respond to challenges of the organisation."

John Kerr, director of marketing and commercial excellence, Armstrong World Industries

"We have a basic structure for our marketing team focused on industries, markets and customers. Our approach is to always think about the customers and marketing first. Our core of marketing will stay the same – other things can change around that, such as learning new digital skills. For example, as a team, we need to be great at analysis – this is not a skill we currently have, so we're looking to bring in people who understand data and related processes. We have changed a bit of the structure, but not the whole thing, otherwise we would lose our sense of purpose.

Catherine Dutton, VP marketing, Atos

What has the transition looked like from your marketing team's perspective?

"There wasn't a big-bang disruption for the team. There were areas where we needed to upskill and create subject matter experts, but it happened over a long period of time. For younger marketers, digital is part of their DNA. It's how they live their lives and they see no difference in doing this in a work environment. These are innate skills. So the team is transitioning, partly by design, and partly through the people we are bringing in."

Annabel Rake, CMO and partner, Deloitte UK

"We are going to phase in changes between now (September) and Christmas, with a few new things happening each month. We currently have Marketo, we're not using it to its full extent but we will by the end of the year. We're also looking at workflow mapping. There is a fear from inside the team that we won't be able to create enough content to use it properly – I'm looking to allay those fears, so that we can take it to the next level."

Jon Burke, director of marketing, Grundfos

"You have to ask what your marketing team stands for. What is its core value? What is it known for in the organisation? You don't want to lose the balance of the team. We have a great team, and we're very client-focused, we deliver results, execute and generate ROI. But we're not world leaders from a digital perspective – at least not yet. We don't want to lose the core, so you have to understand the current values, and have a vision for where you want to get to."

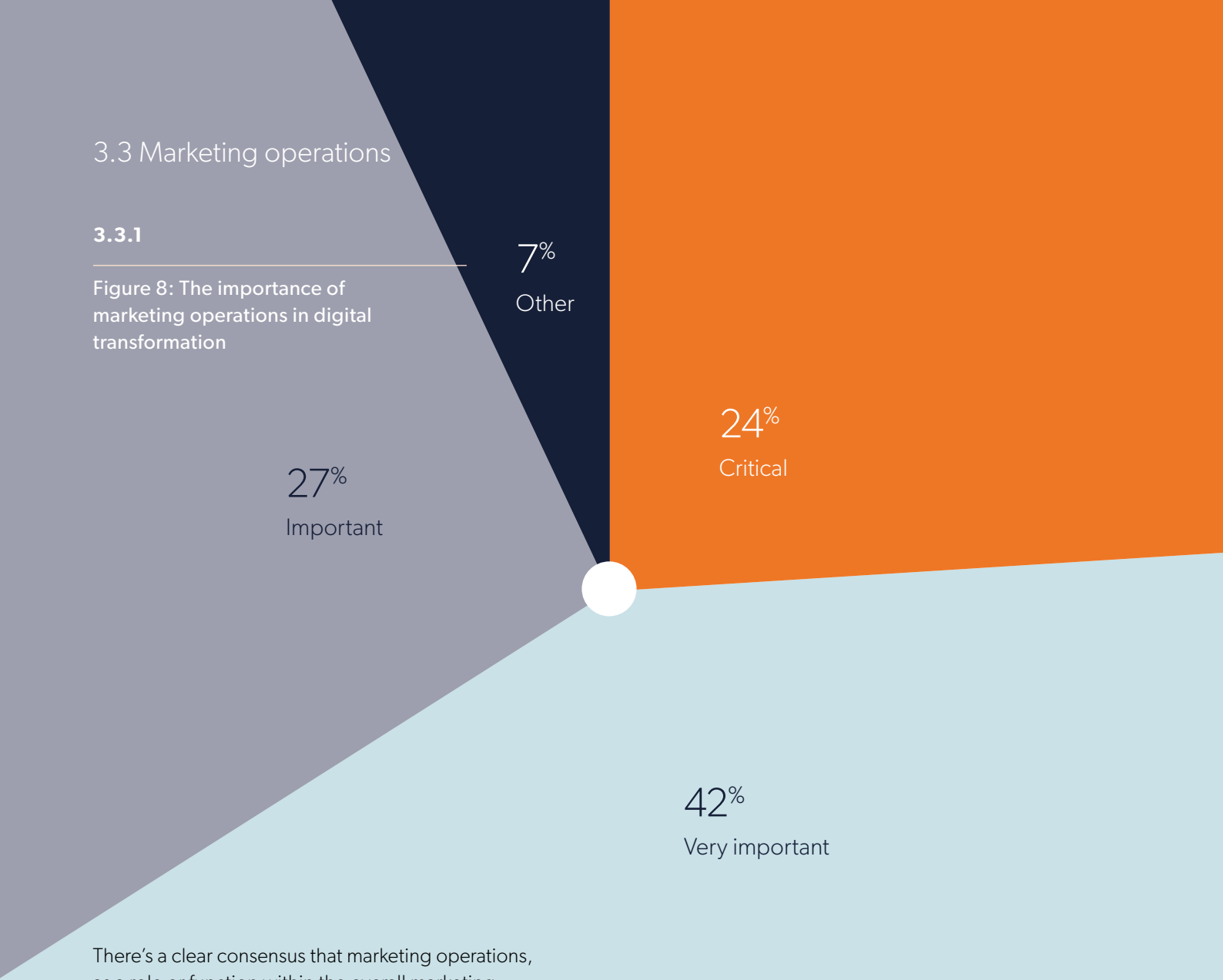
Catherine Dutton, VP marketing, Atos



3.3 Marketing operations

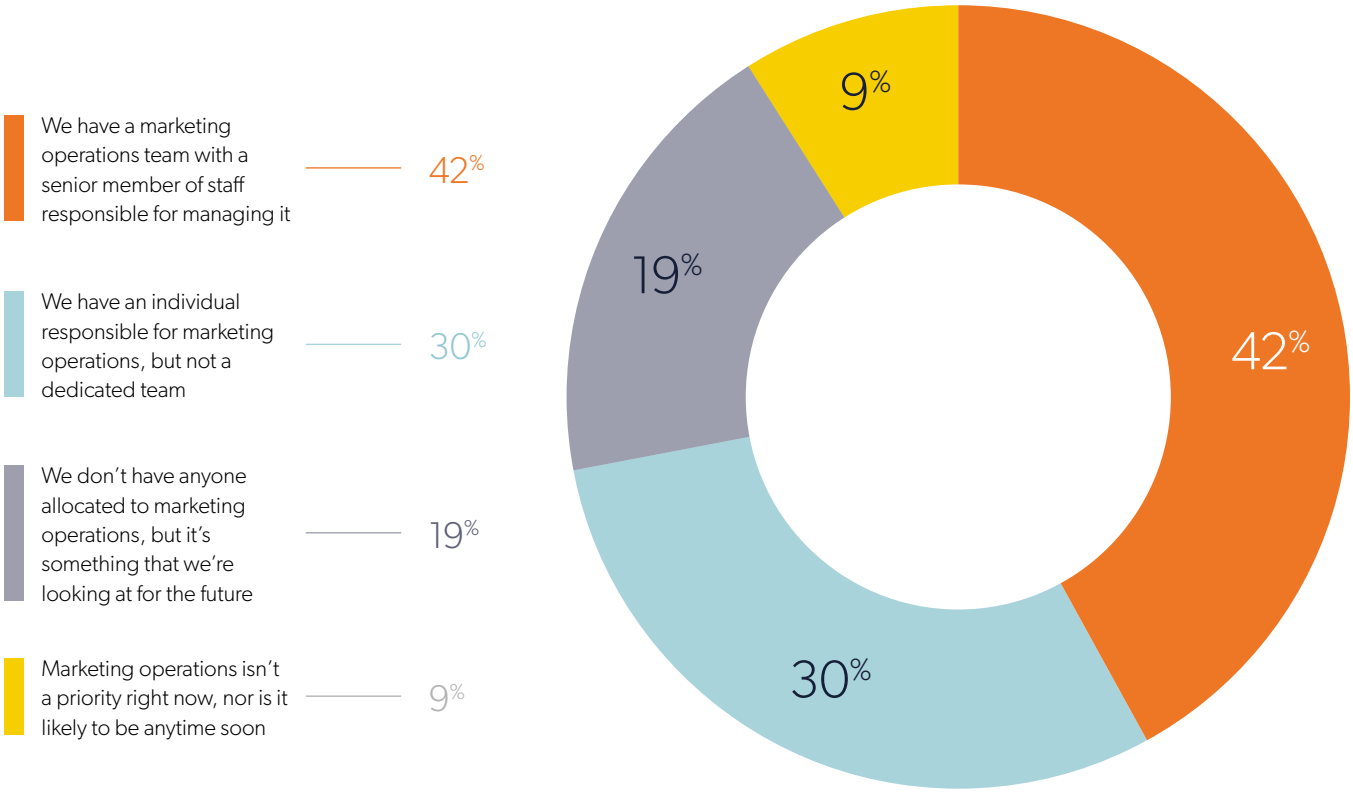
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Figure 8: The importance of marketing operations in digital transformation



There's a clear consensus that marketing operations, as a role or function within the overall marketing team, is likely to be key component in any digital transformation programme. However, as we will see across the page, the existence of such a function is still some way short of universal.

Figure 9: How marketing operation responsibilities are allocated



It's pretty clear that, to different levels or degrees, marketing operations has become a fundamental aspect of the B2B marketing team in the digital era. The largest group of respondants, 42%, have a dedicated marketing operations team headed up by a senior team member.

A further 30% have a single member of staff dedicated to this role, but not a specific team. The difference between those that have a team versus a single lead is likely down to the size of the organisation and marketing team. For teams of less than 10 people, it's likely that one person would be sufficient.

Of the remainder who don't currently have a marketing operations team or lead, 1% are looking to deploy resource in the future, while only 9% have no plans to implement marketing operations any time soon.

Who is responsible for digital transformation in your organisation?

"We have an internal agency, and there is someone within the team who leads this. Five years ago, this was owned by the corporate marketing team. We're moving to an agency model globally, with various existing resources coalescing around this one team. The aim is becoming more integrated."

Annabel Rake, CMO and partner, Deloitte UK

"Managing technology is a core part of my skillset, but I would hope that we could employ a head of marketing operations by the end of next year, once we've achieved critical mass in terms of the platforms we're using."

Jon Burke, director of marketing, Grundfos

"We have an e-marketing manager in our Paris office, who is great at looking at which tools we should be using. Ultimately it's my decision whether we should spend on these or not, based on her recommendation. She proposes what 'good' looks like.

"Marketing operations is something that we'll look at in due course, for things like a possible website replatforming."

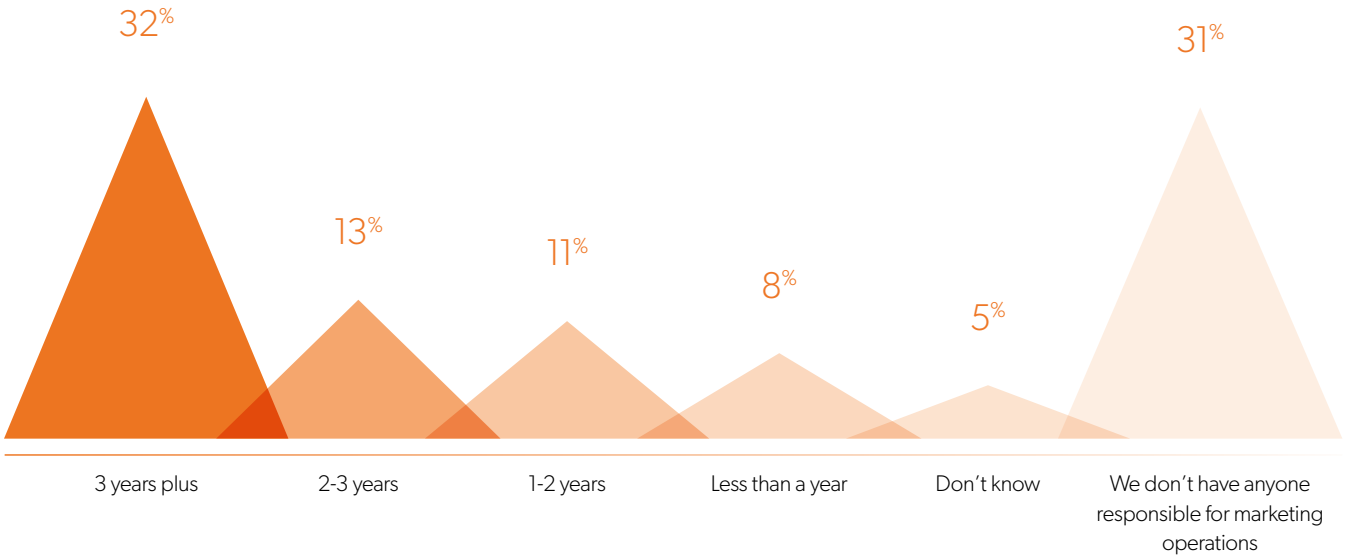
John Kerr, director of marketing and commercial excellence, Armstrong World Industries

"Responsibility falls to different people in combination. We have a global IT function, and people around the business are responsible for different technologies. They use different budgets, such as sales and account budgets. We have a global marketing operations function, but not one in the UK at the moment… although I'm looking at this right now. I'd like to have something in place in the next 18 months or sooner. I'm having a discussion about whether or not we can use the sales operations team to perform some of this role. I'm not precious about which budget it comes from."

Catherine Dutton, VP marketing, Atos

3.3.2 The tenure of a marketing operations leader

Figure 10: Average tenure for a marketing ops role



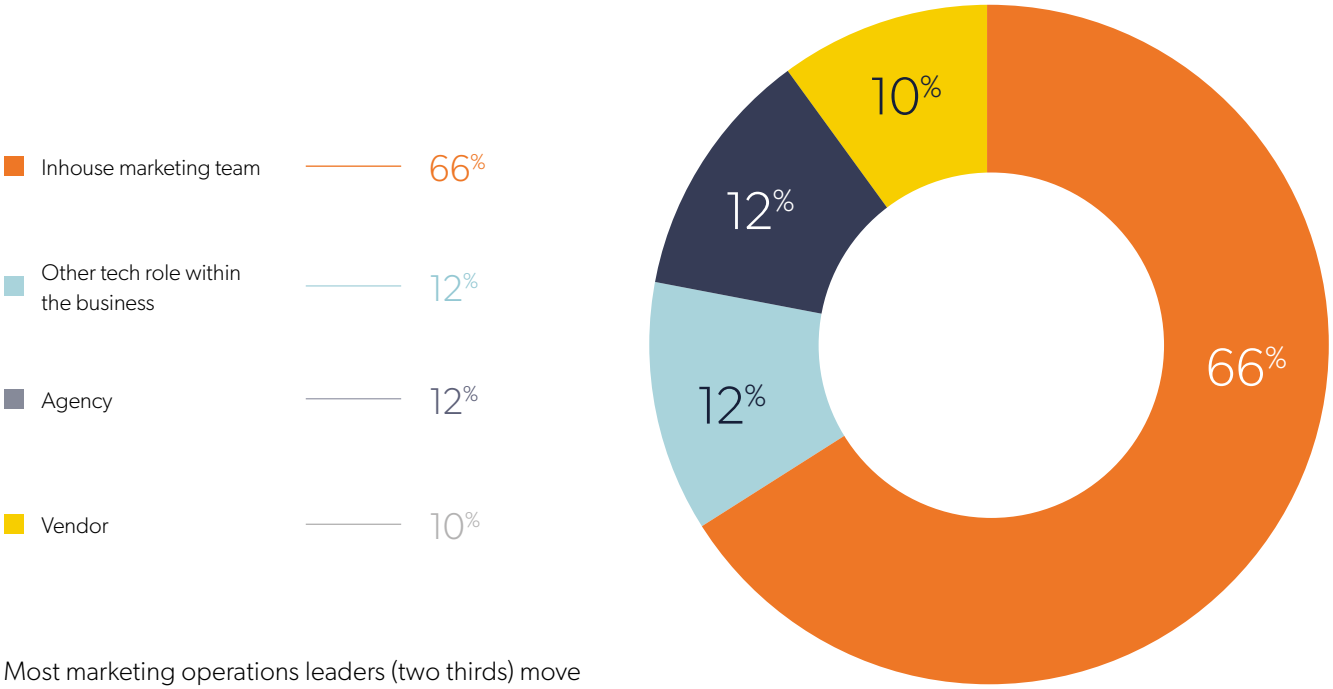
For one third of companies, the role of marketing ops leader is fairly well established, having existed for more than three years. This figure drops to 13% for companies that have had the role for two to three years. A similar number have had someone that job for one to two years, or less than a year.

The chart suggests a gradual migration of around 10% of respondents are installing someone this role, showing its relevance and importance is spreading steadily.

Around 10% of respondents are installing someone this role

3.3.3

Figure 11: The background of a marketing operations leader



Most marketing operations leaders (two thirds) move into the role from within the internal marketing team – they don't necessarily need a specific background in technology or martech, although just under a quarter have one or other.

A further 12% come from an agency, where they may have had more exposure to martech than in an internal team. This demonstrates a pragmatic and possibly realistic approach to recruitment for this role – it is likely that recruiting on the open market would be prohibitively expensive, particularly given the associated head-hunter fees.

Section 4

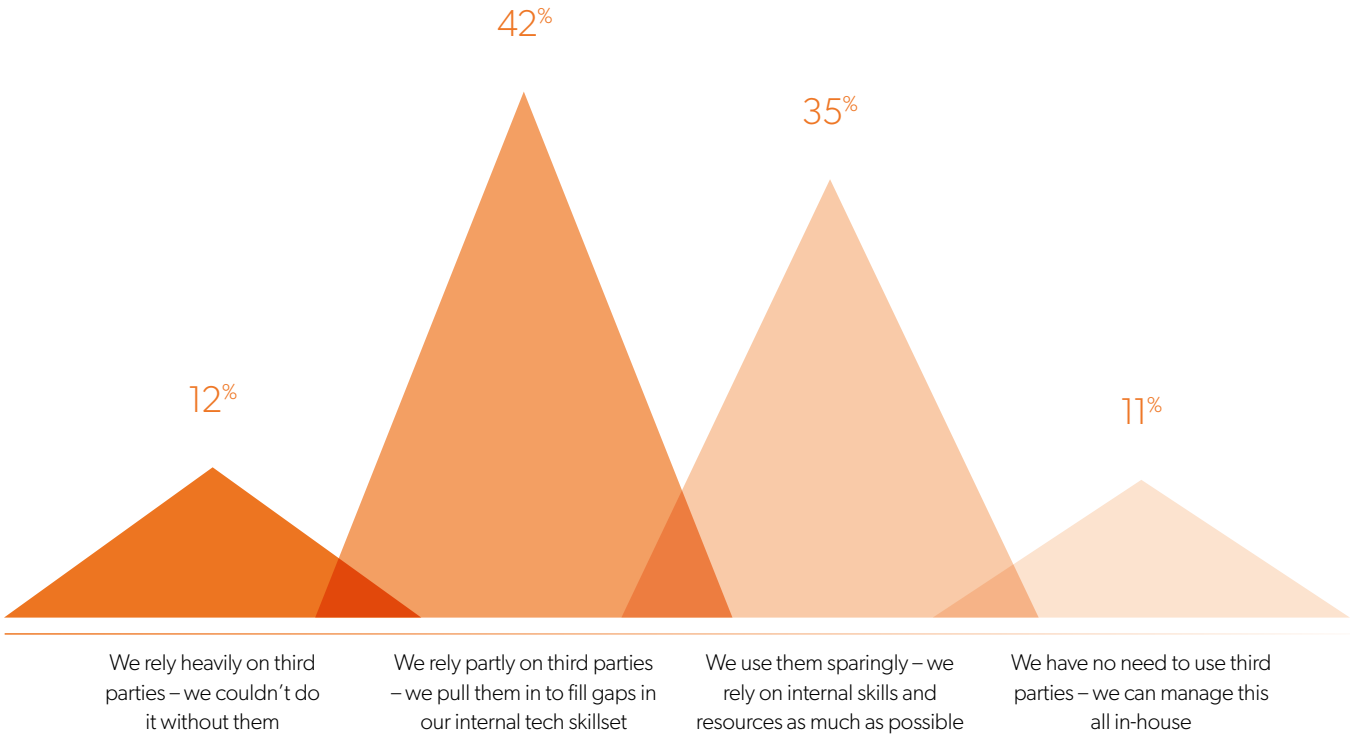
External resources

Given the varied sophistication of martech skills and their importance in enabling digital transformation, it's understandable that marketing leaders rely on external experts to deliver tech-related projects. In this section, we uncover the level of usage, the types of companies being used, and how this is evolving in response to changing requirements.



4.1

Figure 12: The extent of third party involvement in martech projects



There's a wide variety of ways in which B2B organisations use third parties to enable or deliver martech projects – a very similar number either don't use them at all (11%), or rely on them heavily (12%). The largest group (42%) use them a significant amount, while a slightly smaller group (34%) use them 'sparingly', presumably at a time when all other options have been exhausted.

Do you work with third party organisations to help develop your martech, or digital transformation?

"Yes, various different people. Sometimes this could be Deloitte Digital, our sister company, sometimes we work directly with the vendors. We look for specialists in the field – for example, we worked with Clever Touch on marketing automation. We have a whole host of agencies providing services when we don't have the skills internally, or when it doesn't make sense to develop them in-house."

Annabel Rake, CMO and partner, Deloitte UK

"We're always looking for the experts. We have a vision of what we would like to get to. But it's not about us doing less internally. We're looking to access expertise where we don't have it."

John Kerr, director of marketing and commercial excellence, Armstrong World Industries

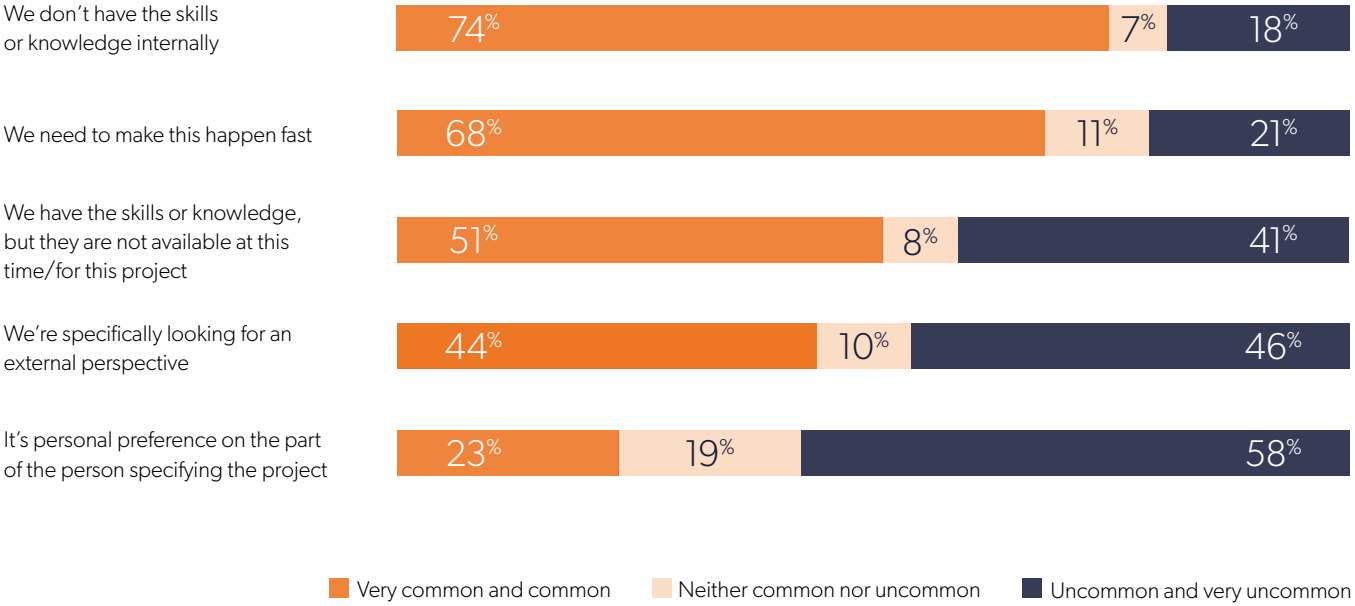
"We have two individuals working with us as consultants on contract. They have done other things, beyond the initial brief and we're backfilling for other roles. I would love to do more of this. It's good to bring in external experiences, especially if you're challenged with headcount. The wider team benefits, and you don't have the traditional agency/client divide. Unlike traditional consultants, they have to work onsite and be integrated with our team."

Catherine Dutton, VP marketing, Atos



4.2

Figure 13: The triggers for using third parties



Unsurprisingly, the two most common triggers for using third parties in martech projects are a lack of internal skills and a need for pace – these issues were identified as 'common' or 'very common' by 75 and 68% of respondents respectively. Over half of respondents are likely to use third parties to ease short term resource or capacity issues, while around 44% are likely to use them in order to get an external perspective on how to tackle a specific challenge.

4.3 Types of third parties and how they are used

4.3.1 Use of consultants

The most common third party organisation involved in a martech selection, deployment or management programme, is a consultant that specialises in these activities and has developed strong expertise in martech platforms.

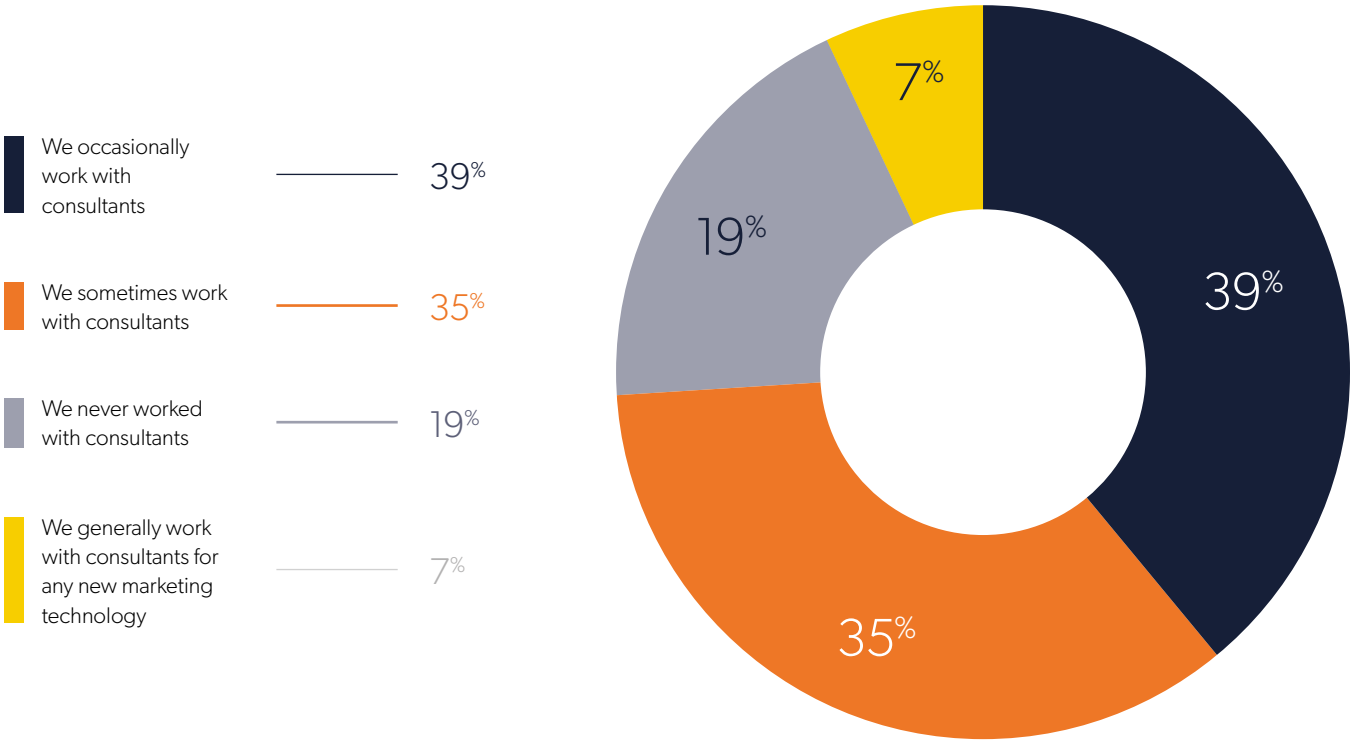
However, while usage appears anecdotally to be growing (along with the use of martech overall), respondents currently use them sparingly, if at all.

Only 7% of B2B marketing organisations regularly use consultants for martech projects, with a further 39% using them sometimes. Just short of 60% of respondents use them occasionally or not at all. It's clear that consultants' role in digital transformation and general martech acceleration is currently pretty minimal. Whether that's because B2B marketing leaders are rejecting them as an option, because they're failing to position themselves correctly, or there simply aren't enough good ones around, is hard to determine from these results.

While usage appears anecdotally to be growing (along with the use of martech overall), respondents currently use them sparingly, if at all

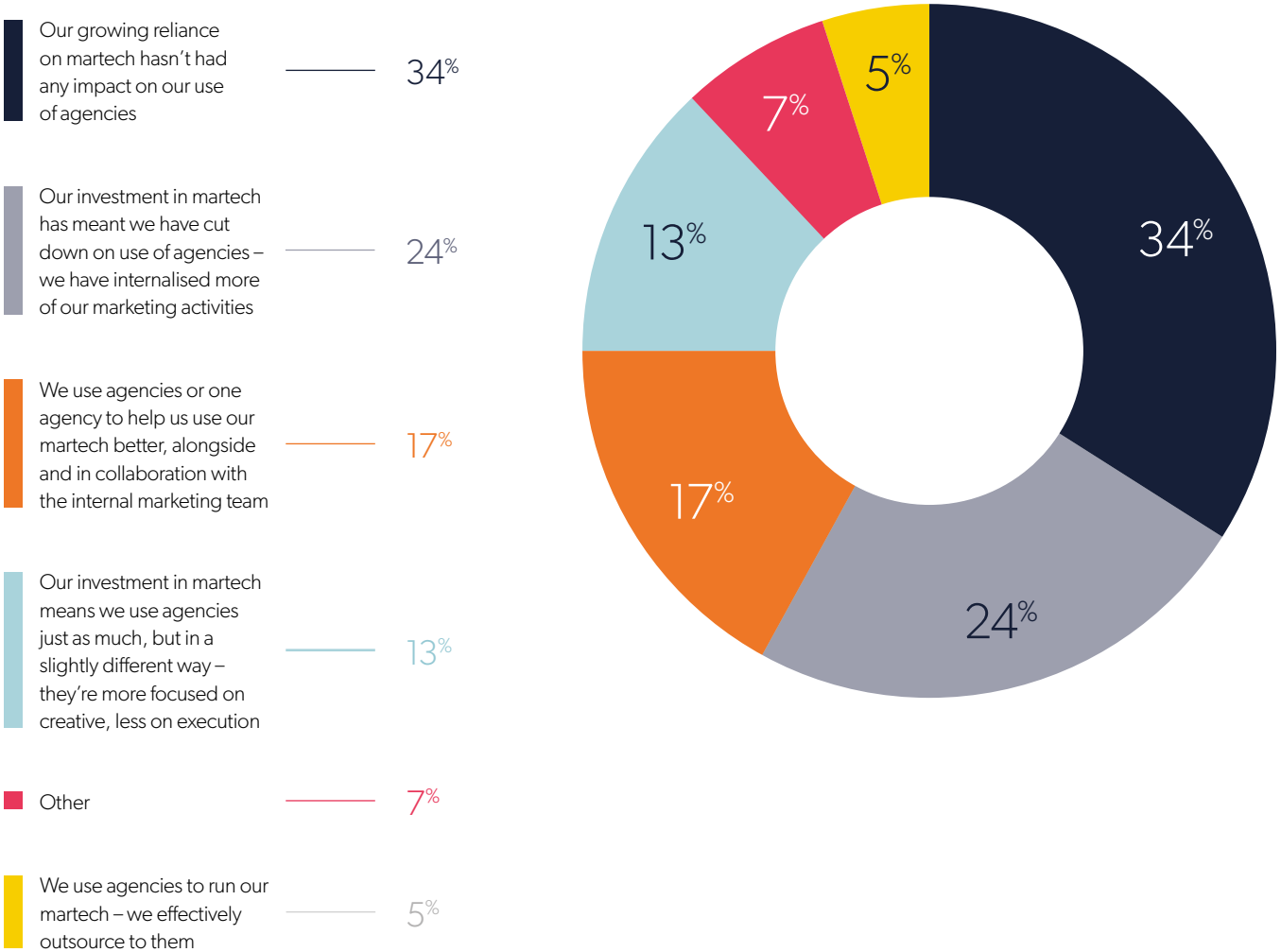


Figure 14: The use of consultants in the selection, deployment and management or marketing technology



4.3.2 Changing use of agencies

Figure 15: The use of creative agencies in running marketing technology platforms



While the role of consultants in digital transformation appears limited at best, it seems some B2B marketing agencies are more successful at exploiting martech acceleration. At the same time, the growth of martech is creating challenges for agencies.

A very small number of respondents (5%) outsource all of their martech-related activities to agencies, while a slightly larger group (17%) rely on agencies to work in parallel with their internal team.

That's the positive side for agencies – on a more negative note, roughly a quarter of respondents have cut their use of agencies while increasing their use of martech. It may be they're using budget formerly allocated to agencies, outsourced marketing campaigns or programmes, to fund internal marketing activities.

On a similar note, 13% of respondents are using agencies just as much, but in a slightly different way – focusing their energies on creative, rather than execution. Meanwhile, the largest group of respondents have not changed their use of agencies regardless of their martech deployment.

It's apparent the rise in martech creates both a challenge and an opportunity for agencies – with clients deploying more martech internally, they have the ability to execute without the need for external input. This may ultimately lead to a reduction in the relevance of agencies, if not now, then in the future.

Alternatively, it creates an opportunity for agencies that can demonstrate their understanding and aptitude with technologies. Those that can change the way they work with clients, removing hassle and complexity, could become a permanent part of the outsourcing function. Ironically this could be a route back to the kind of permanent retainer fees that agencies enjoyed until around ten years ago. This provides a stable revenue model, which may be enticing for some, although possibly at the risk of creative compromise.

To what extent has your use of agencies changed as a consequnce of digital transformation and/or greater use of martech?

> "We will always look at internal resources if possible. We will go externally if we don't have the skills, but it's on a project-by-project basis. We generally have at least one agency working with us on a project at any one time."
>
> **Jon Burke, director of marketing, Grundfos**

> "There isn't any change in how we're using agencies, although we are using them more than we did in the past. Today, it's about 35 to 40% of the time, up from about 20 to 30%. In the short term, we use external people to meet an immediate need. If it's a continuing trend, we think about how to find someone with that specialism. For CX, we'll soon have a full time expert."
>
> **John Kerr, director of marketing and commercial excellence, Armstrong World Industries**

"Our use of agencies is getting bigger as our budgets are increasing. Getting more budget is easier than getting more people. You can outsource a project for £25000, but you can't get a person for that amount. Our use of agencies is reflecting the demand for our business to grow, but without adding headcount.

The team is very busy doing all of the regular work, but less so focusing on our big 'showstopper' activities, such as the big events we run each year. I want us to go to town on these, to have real impact. So I'm looking to get agencies to focus on the big stuff, to make it worthwhile. We need to challenge internal thinking and provide access to skills and platforms that we don't have. It's not just about creative, it's about taking us to another level."

Simon Rusling, partner and head of marketing, Barnett Waddingham

"Our strategy is to bring in agencies to do what we can't do ourselves. For example we're using a creative agency for our bid marketing, which is very personalised and we don't have the people in the internal team who can do that. This agency has created an internal team for us, which means they can deliver on our requirements almost immediately, or if not, at least overnight. Other agencies can't do that. We don't have the time to wait – this is as big a barrier as budget."

Catherine Dutton, VP marketing, Atos

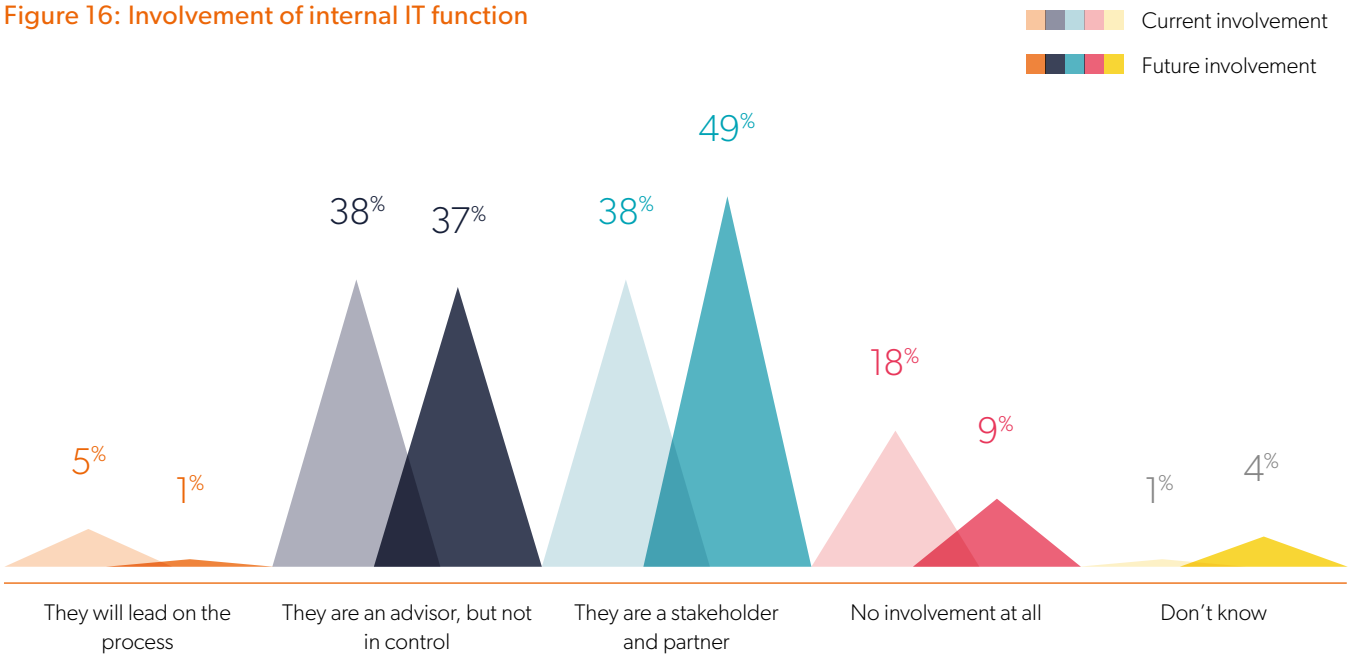
The rise of internal agencies

The majority of marketing leaders we interviewed hadn't changed their use of agencies, which suggests a relatively stable picture. However, it's interesting to note that Deloitte and Atos (to a lesser degree) are investing in internal agencies of various forms, which will better equip them for the digital age and changing client needs. It won't be relevant, or possible, for all B2B brands to access an internal agency, but it's likely that we'll see more of the larger players relying on this type of creative function. That's going to place a big challenge on traditional external agencies.

Getting more budget is easier than getting more people. Our use of agencies is reflecting the demand for our business to grow, but without adding headcount

4.4

Figure 16: Involvement of internal IT function



Back in the pre-digital era, the internal corporate IT function could be (and often was) the primary blocker for marketing-related technology projects. Even when projects were officially approved, the ability and willingness of this team to deliver on objectives in an efficient manner could not be guaranteed, and was often conspicuously absent. Many B2B brands attempting on-premise CRM implementations discovered this to their cost.

The rise of SaaS-based marketing platforms removed many areas of conflict, and in numerous instances even the need for any direct involvement of the IT function in martech-related decisions.

In today's digital era, many of the recent predictions from the likes of IBM on the role of the CMO in leading martech decisions have been realised. A new relationship with the corporate IT team has emerged in many organisations, based on partnership, rather than (at worst) a sense of disparity, or event conflict.

This is clearly borne out in the response to our survey, with the role of the IT function seen by the majority as an advisor or partner in martech implementation projects, both now and in the near future. This doesn't mean that working with the IT director or wider IT function will be without challenges, but it frames the nature of the relationship quite differently, and consequently the criteria required for success.

"We've been working with a consultant on building our martech strategy. I have a meeting with the head of IT at the end of the month to go through our strategy. I planted the seed with him a while ago. He's a bit resistant because there are lots of demands on him. I've given him a month to read it, so it won't come out of the blue. I need him onboard as a partner; I can't do it without him."

Simon Rusling, partner and head of marketing, Barnett Waddingham

"The CIO got the ball rolling [with the martech transition project] and the Business Operations Team are now heading this up. People are hoping to resolve lots of different issues via this project. Once they have selected the platforms they'll reach out to subject matter experts within the business about how to make this work."

Melanie Thomson, head of marketing, RM Results

"They [IT] aren't that involved. They might look at the back end, at the server requirements for example, but not with much else. I don't want them to be involved any further as I don't want to slow the project down."

Jon Burke, director of marketing, Grundfos

"IT is absolutely involved – we work closely with them. They provide a technical viewpoint that we don't have. They are doing this day-in-day-out so it's much better to have them involved than not. To work most effectively with them, you have to ensure you have a consistent and mutual goal, a partnership ethos. We have a multi-disciplinary model for clients and we're seeking to apply this service ethos internally."

Annabel Rake, CMO and partner, Deloitte UK

"They [IT] are fully involved. It's an interesting relationship and dynamic, but we always get to the solution, and they do add value. It's great to have people within the organisation who understand tech."

Catherine Dutton, VP marketing, Atos

Section 5

Marketing leadership

How should the marketing team be structured and led through this new world? What kind of skills and expertise are required to drive the best results?

As the accelerated use of martech continues to drive change in both the structure and function of the marketing team, it will correspondingly impact on the role of the marketing leader.

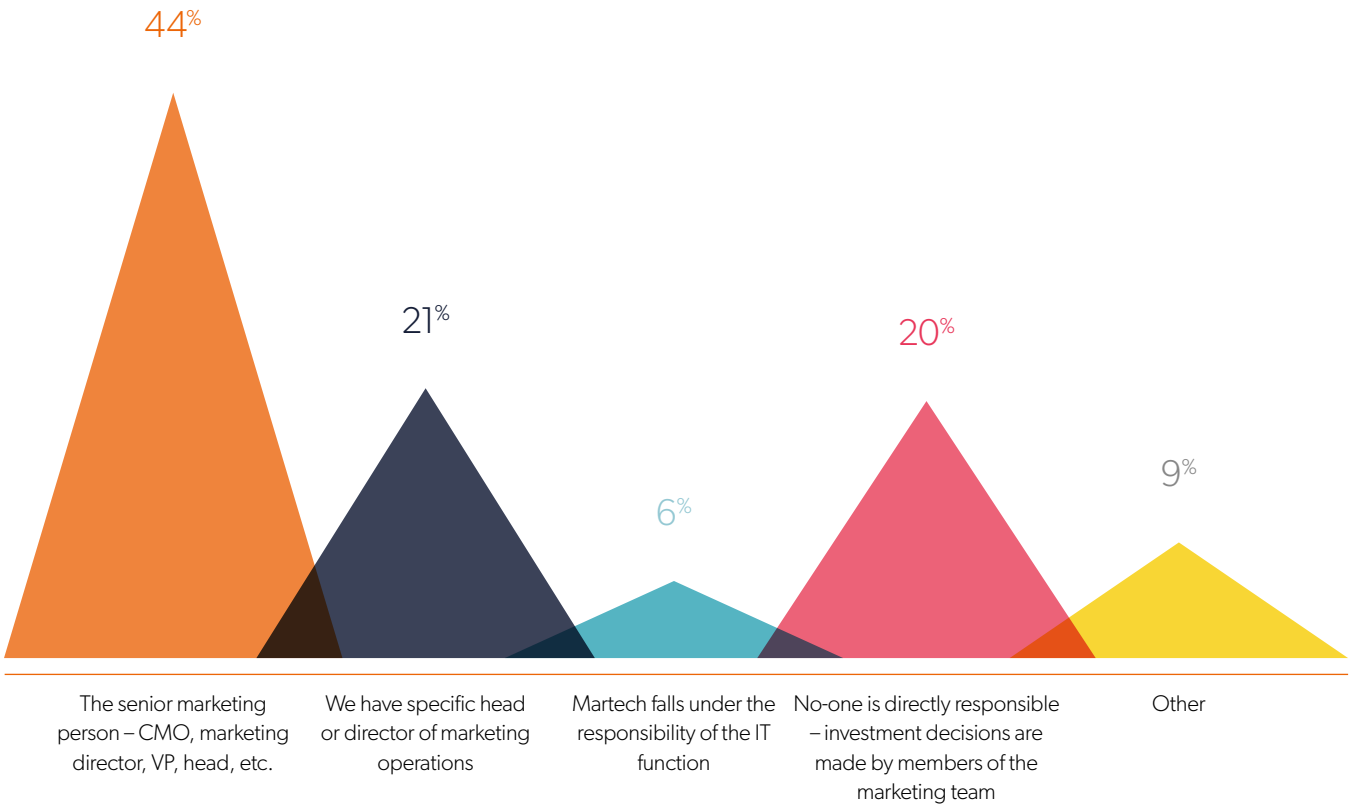
This will have many facets, which will relate in particular to budgeting and the engagement of the executive leadership team. We'll explore some of these aspects in this section.

As we saw earlier, although having a formal operations role and/or team is increasingly common in B2B organisations, the extent to which it's able to act autonomously from the CMO or marketing leader is mixed. Nearly half of our respondents said the departmental leader is still responsible for the martech decisions. In many instances this is likely because the individual responsible for marketing ops is not senior or experienced enough to make those decisions.

One in five respondents have devolved this responsibility to a marketing operations leader, while for a similar number of respondents, such responsibility is distributed evenly around the team, aligned with functional need. Responsibility for martech only falls to the IT team in 6% of instances.

5.1 Overseeing marketing operations

Figure 17: Where responsibility for marketing technology sits in the average organisation





How has your role changed as a consequence of the digital transformation?

"Fundamentally my job is about getting the right message to the right person at the right time, in a meaningful and impactful way. The fundamental premise is the same – I need to know a bit about everything. Not be an expert but be able to ask pointed questions. We need to experiment and understand the client needs but we must be careful not to get too carried away with tech. As people, and as marketers, we like new and shiny things, but we must be careful not to do something because it is a fad."

Annabel Rake, CMO and partner, Deloitte Uk

"My challenge is to translate the business need into digital strategy. I know the direction, but not necessarily how to get there. I rely on people in the team to provide information and perspectives, but they can be too narrow in their focus and thinking. It's up to me to take the broad approach. As regards marketing operations: I am 60% of the way through creating this role. I have identified someone in the team who I expect will be in role by the end of our financial year. I have already had the discussion with them, but it's not an overnight transition. We need to ensure that their existing workload is covered. Once they're in place, it will allow me to put my head up and see what's going on."

Simon Rusling, partner and head of marketing, Barnett Waddingham

5.2 Overseeing digital transformation

Figure 18: Which of the following statements best describes the marketing leadership situation?

33%

The CMO needs to be personally involved and visibly responsible for leading digital transformation

25%

Digital transformation should be the remit of one senior member of the marketing team – working with the CMO when necessary

2%

Digital transformation should be led by external parties, that have an unbiased perspective on priorities and requirements

1%

The IT function should lead digital transformation

2%

The CEO should be responsible for digital transformation, as it transcends marketing

37%

It's a multi-function challenge, with most or all of these stakeholders participating to a greater lesser extent

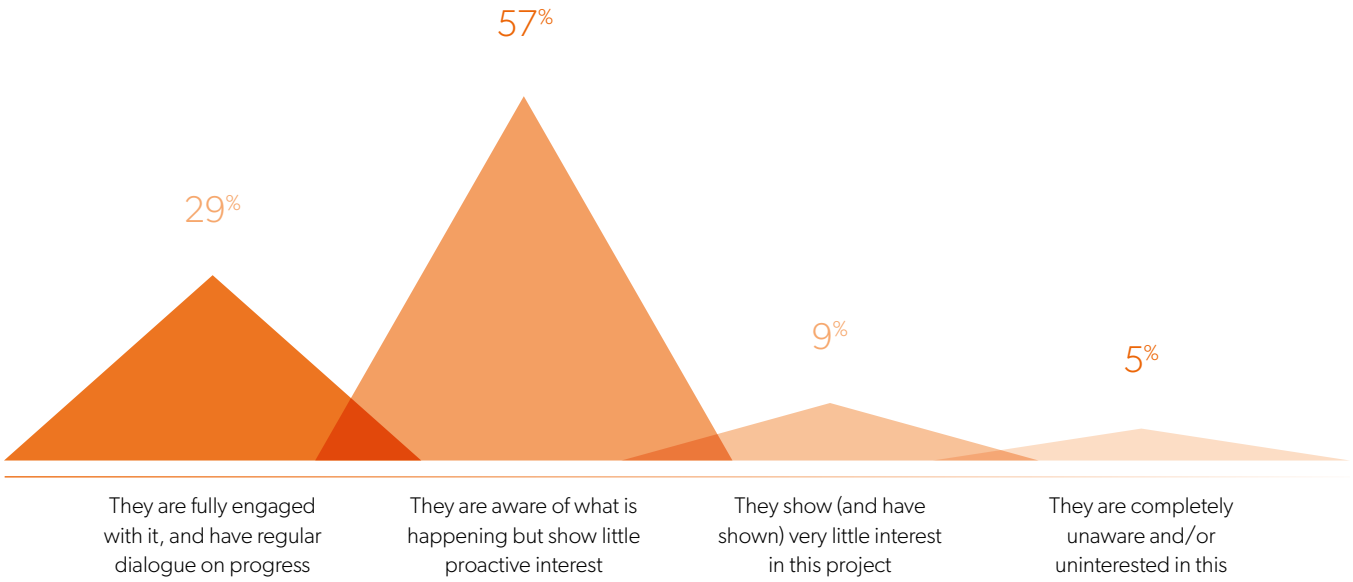
When it comes to leading digital transformation, the opinions of our respondents were broadly split three ways, with (very roughly) a third believing that this project should be led by the CMO, someone else in marketing, or by a multi-disciplinary team with stakeholders from different departments (including IT). Significantly, very few respondents felt that IT or the CEO should lead this project.

As with many of the questions in this survey, individual circumstances will play a big role in determining the respondent's answer – for example, where there is a senior marketer leader or a marketing ops function, it's likely they would lead the project. Alternatively, in an organisation with a relatively small marketing function and a sales department that is better resourced and respected, it's likely that individuals from the latter would play a more significant role.

Significantly, very few respondents felt that IT or the CEO should lead this project

5.3 Involvement of the c-suite in digital transformation

Figure 19: The level of engagement from the c-suite, board or executive leadership team in digital transformation



Much to marketing leaders' frustration, the c-suite isn't renowned for its focus on what marketing is doing and the progress it's making. However, digital transformation is a topic that appears to be very much on the executive board agenda.

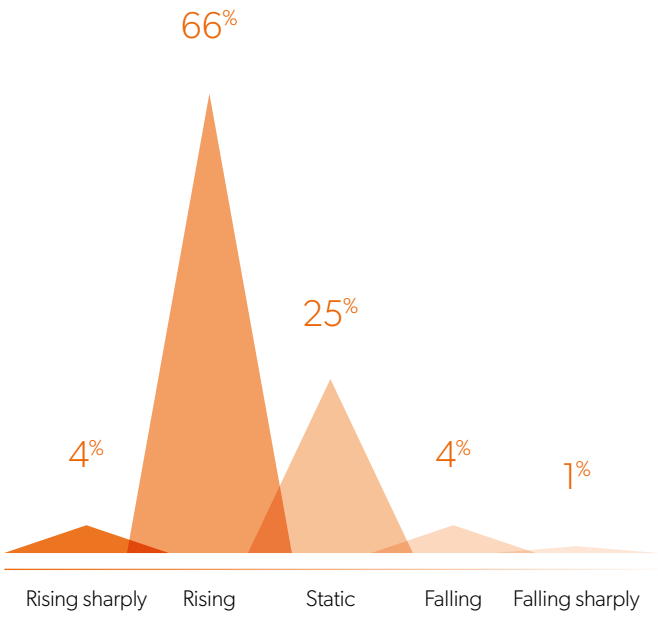
Just under 30% are proactively engaged with this project or process, and are regularly involved in dialogue on the topic. A further 57% are aware of what's happening, without necessarily taking a proactive involvement, and only around 15% take little or no interest in digital transformation.

This suggests transformation can be used as a means for marketing to better align itself to the business and demonstrate its effectiveness in meeting objectives. As such, it can be both cause and consequence of marketing's rise to prominence.

5.4 Budgeting for martech

5.4.1

Figure 20: Martech budget changes

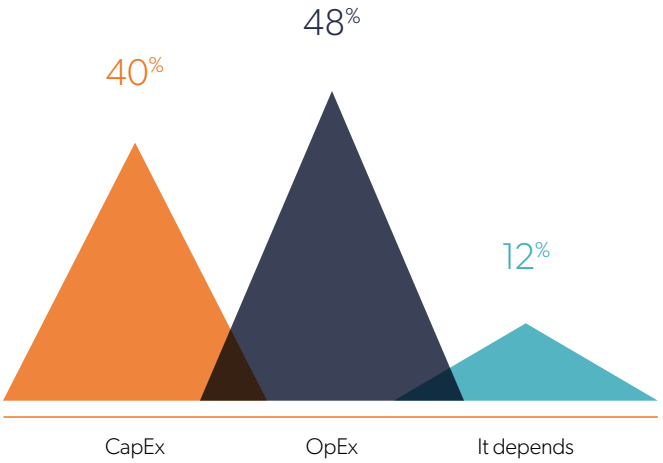


Investment in martech is clearly on the rise, although with a degree of caution. Although 70% of respondents reported expecting to spend more on martech, only 4% said investment was rising sharply. This may reflect caution on the part of marketing leaders in ensuring that they're generating ROI from their existing tech stack, and/or difficulties in building business cases for new investment.

A quarter of respondents expect investment in martech to remain unchanged, and only 5% expect it to fall.

5.4.2

Figure 21: Budget structuring and investment planning



While almost half report a fluid approach to budget allocation for the deployment of martech, 48% are largely allocating from operational expenditure. This can be a pragmatic means of securing the necessary budget, but it can also mean the short term suspension of other activities to pay for it – in particular fulfilment through agencies, which in turn is driving some brands to re-evaluate their use of this external support.

More significantly, for big martech projects such as implementing marketing automation, it can be difficult to sufficiently bend the rules so that OpEx can cover the necessary costs. Many marketing leaders are not used to having discussions with financial directors or CFOs about CapEx investments for marketing, but given the changing nature of martech, these conversations are likely to become more common. Marketers may need to cultivate strategies for this.

Section 6

Marketing operations

6.1 What is marketing operations?

Numerous definitions for marketing operations are circulating, but all agree that it's a critical part of the marketing function, at least potentially. Each of the different definitions will resonate with different organisations, and marketers considering implementing this function will find the most appropriate one for them.

Sometimes it's described as the 'backbone' of the marketing department, delivering planning, governance and allowing the team to deliver their objectives. Elsewhere, a hub and spoke metaphor is used, with operations as the hub sitting centrally to the wider functions, such as budgeting, planning, resource management and competitor analysis.

6.2 Marketing operations and technology

The role of technology is without question one of marketing operations' core responsibilities, but it's far from the only one. Indeed, few would argue that marketing operations exist for the sole purpose of deploying or enabling marketing technology.

The default drivers of martech excellence are not the technology itself but the expertise in selecting, deploying and actualising it. That comes down to marketing operations, and the increasingly critical role of martech in all aspects of marketing means that tech – and more critically marketing operations – are in greater demand.

6.3 Integrating marketing operations into your team

The word 'formalising' is used here because much (if not all) of the responsibilities held by marketing operations are fulfilled prior to its inception, either by different members of the team, or the team leader.

It may be that technology drives the need for a marketing operations function, but once established, it becomes both an enabler of,

and a catalyst for, marketing's wider transformation beyond the realms of martech.

For a B2B marketing leader creating an operations function, one of the inherent challenges will be to separate their own role from that of this new one – and understand how the two need to interact in the future.

As our data shows, marketing operations functions currently in existence are commonly led by individuals with a marketing background, rather than one in technology. This means they can often be recruited from within the existing marketing team.

This can offer junior team members great opportunities for advancement and strategic responsibilities. Given the potentially wide-ranging nature of the role, the individual responsible may even become, by proxy, the departmental leader-in-waiting.

For a discipline that is conspicuous by its absence in many B2B organisations, marketing operations is, on paper, a critical part of an effective marketing team. You could call it the backbone of the marketing function.

Comment from Clarasys

What does Marketing Operations have to do?

- Own and manage the customer experience, journeys and supporting processes
- Own and govern data
- Provide insight and analytics
- Deliver and manage change
- Own and manage marketing technology in partnership with IT
- Deliver ROI

Marketing Operations – What does good look like?

Where has marketing ops been done really well? That's the question I asked myself having read B2B Marketing's report. Maybe I've been unlucky, but nowhere immediately sprang to mind.

In my experience, the focus on well-established and successful sales operations far outweighs the attention and investment in really good marketing ops.

Marketing now has far more moving parts than ever before. You have to integrate creative data technology, process and people to deliver the experience that we, as customers, expect. And those expectations are greater than ever before.

In many ways there are as many similarities with technology delivery as there are with the more established business operations domains such as sales operations.

This isn't one person, but a team working together to make best use of their skills. It will call on all the members of the team to be T-shaped and to have, what to me are, core consulting and project management skills.

To be successful, the marketing operations team needs a clear vision of what you're trying to achieve and a way of prioritising the ever expanding workload it will receive. It will have to have executive sponsorship to ensure that key initiatives are driven across the business and not dismissed as "just for marketing" – data springs to mind.

Marketing operations isn't optional any more. If you want to execute with an evolutionary approach to customer centricity and deliver on customer and business expectations, it's a necessity.



Section 7

Summary, conclusions and takeaways

This report was broad and ambitious in its scope, consequently the insight above has covered a lot of ground. The following summary is designed to highlight its core messages with the following questions intended as a guide for marketers uncertain about their next steps.

Perhaps the core message of this report is that you can't do digital marketing without a reasonable degree of martech, and you can't use martech to any serious extent without marketing operations (unless you outsource the bulk of your programme deployment to an agency, internal or otherwise).

1. Transformation is in the eye of the beholder

One marketer's transformation is another person's rapid evolution. Just because you may not fear an immediate cliff edge, communicating a greater sense of urgency may help make critical decisions and get other stakeholders onboard.

Questions to ask yourself:

- Do you have a clear view of the transition that you'd like your marketing function to make? What's your view of the destination, and your roadmap for getting there?
- Do you understand your internal stakeholder group and how their agendas align with yours?
- Have you formalised this vision and communicated it to them, in a clear and coherent way? Is the onus on business transformation, rather than marketing?

2. Marketing operations is the key to unlocking the potential of martech

The CMO does not need to know all the detail about how to utilise all the solutions in your tech stack, but they need to know "enough to be dangerous". In other words, enough to understand what's going on, why, how it aligns and delivers against marketing strategy, and whether it's working or not.

Questions to ask yourself:

- Do you have a clear picture of marketing operations' role – both in line with technology and wider marketing?
- Do you know the skillsets and attributes required for this individual/team?
- Do you have a development and growth plan for this function, once it becomes established, and an understanding of how responsibilities will be reassigned?

3. Marketing teams need to change

This means upskilling, reskilling and possibly churn. Some of that is happening naturally, in line with demographic changes, but that won't allow you to get ahead of the game. To steal real competitive advantage, it's likely that bold and unpopular decisions will need to be made, and a large part of the CMO's job will be to manage the transition of both the team, and specific individuals.

Questions to ask yourself:

- Have you audited your current team recently? Do you understand their strengths and weaknesses both on an individual and departmental level?
- Do you have a vision for the skills and attributes you'll need to bring or strengthen over the next 18 months?
- Are you willing to consider creative solutions to encourage a change in behaviours and attitudes? Are you prepared to make pragmatic and potentially tough decisions about individuals who don't align?

4. Martech is critical to enabling new competencies and attributes

Marketers need technology in order to develop skills for the future. It both enables the transition, and is the transition.

Questions to ask yourself:

- How fit-for-purpose is your current tech stack? Is it delivering on your needs both now and for the future? Does it integrate? How scalable or flexible is it?
- Does your current approach to budgeting for martech align with your future needs? Are the CFO and/or CEO conscious of changing future requirements?

5. The CIO or IT function is not the enemy

In fact if the CIO and IT function aren't your allies, they ought to be. Sooner or later they will be important.

Questions to ask yourself:

- Do you have a good relationship with the CIO? Do you understand her or his agenda and priorities, plus the extent to which they align with yours?
- Have you shared your view on your future tech with them? Have you sought to engage them in constructive dialogue on this?
- Do you understand their expectations and/or aspirations in terms of their level and type of involvement in future martech?

6. A dynamic, flexible and above all pragmatic approach to resourcing is the future

Focus on upskilling the internal team, but also plugging gaps with external resources and using them to get fresh perspectives and accessing new skills.

Questions to ask yourself:

- Do you have access to the right balance and mix of both internal and external skills? Are you using third parties in the most effective way?
- Are you getting the best out of any consultants or integrators currently on your books? What else could they help you to do better, quicker or cheaper?
- What cultural opportunities and challenges will be presented by bringing more external people into your team?

7. The role of the agency is changing

They may look more like consultants in the future, and operate on more of a partnership basis, collaborating with your internal team, rather than working at arm's length.

Questions to ask yourself:

- Are you using your current roster of agencies to their full potential? Are these agencies best aligned with your needs right now, and for the future?

- Are there aspects of what they are being paid to do that could be better deployed elsewhere, or on internal resource?

- Are they bringing genuine insight, and helping you to do things that you couldn't otherwise do? Are you just outsourcing?

8. Your personal success as a practitioner is likely to hinge on martech

Your ability to understand and deploy martech effectively will impact your personal career success – more so than the success of the organisation.

Questions to ask yourself:

- Do you understand the level of martech expertise and knowledge that you'll need – both now and for the future?

- Is the organisation aligned and committed to the transition that's required to achieve its objectives?

- What aspects of martech will be critical to getting you your next job?



Conclusion

There isn't the appetite to deliver a full scale, full pelt transformation, nor is there the budget or skills to do so. B2B is being what it has always been – pragmatic. Marketers are making that journey happen at the pace and boldness that's relevant in the specific organisation, and that will vary hugely.

One thing is for certain, technology will play a part in this, almost certainly a critical one. Having the means and the knowledge within your armoury is fast becoming a non-negotiable. Companies that don't have a marketing operations team already are generally looking at this for the future. If you're not on this journey, now's a good time to start.

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