EBOOK

Marketing Operations Process Management for Beginners

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Contents

Introduction

On any given day, marketing operations teams may be analyzing data, executing campaigns, tracking budgets, and key metrics—anything that contributes to the overall efficiency of marketing efforts. Teams work across departments while improving processes, but the work often feels chaotic and overwhelming.

When done well, marketing operations can provide a 15 to 25 percent improvement in marketing effectiveness, as measured by return on investment and customer-engagement metrics. This kind of value added explains why the role of marketing operations continues to expand and is now viewed as an essential piece of the marketing mix. Yet, achieving high levels of improvement remains elusive for many marketing operations teams.[2]

One reason many marketing operations teams struggle—even though they may be skilled marketers with technology know-how—is that they could use better project workflows. To help, here are five ways your team can improve work management processes to reduce chaos and improve effectiveness:

1. **Better manage ad-hoc work requests**
2. **Prioritize work strategically**
3. **Improve communication across departments**
4. **Develop repeatable processes**
5. **Prove your team's worth**

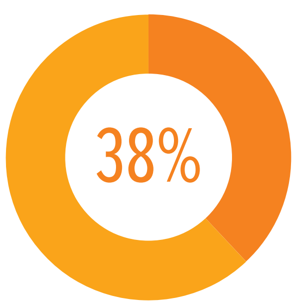
1 Out-of-Control Ad-hoc Requests

Marketing operations teams work on strategic projects, such as technology implementations, process development, and data quality, but they are also bombarded with ad-hoc requests from other departments throughout the company. They receive frequent requests from sales, finance, and marketing to compile reports, analyze data, troubleshoot software, and more.

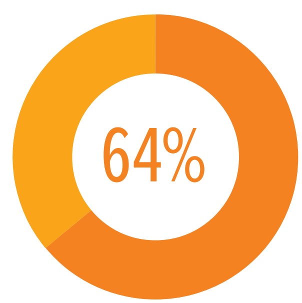
Juggling ad-hoc requests alongside other day-to-day work is challenging and most marketing operations teams don't have a good way to manage or prioritize the work. In fact, 38 percent of B2B companies cite inefficient processes or workflows as one of the most challenging obstacles to marketing success.[3]

Do these challenges sound familiar?

- Requests are easily lost or forgotten because they come in so many forms (email, hallway conversations, sticky notes)
- The work requirements aren't clear
- No one knows who is working on what or how much capacity they have to take on ad-hoc requests
- There is no good system to determine the priority of ad-hoc requests against other strategic work



38% of B2B companies cite inefficient processes or workflows as one of the most challenging obstacles to marketing success.[4]



64% of workers said there is often confusion at their company about who is doing what.[5]

Solution: Standardize the Request Management Process

Ad-hoc requests will never go away, but standardizing the entire request process will eliminate a lot of the chaos and confusion. Clearly defining the steps of the process, from how requests are received through how they are assigned, makes it easier to prioritize ad-hoc requests alongside other strategic work.

Here are three steps you need to implement to gain control of requests:

1. **Receive all requests in a central location.** No more sticky notes left on your desk or office drive-bys—make it a rule that all ad-hoc requests are submitted in the same manner to the same location. This process is hopefully more sophisticated than a simple paper form filled out and delivered to a designated basket. An electronic form sent to a designated email might be the right solution for your team. Or you can use a request or project management tool with a built-in and customizable request form.

2. **Require a comprehensive marketing brief.** When you lack clarity on all the requirements for the work requested, additional time is spent gathering the details or going through multiple iterations to meet the client's expectations. It's a highly inefficient way to work. Save everyone's time by requiring a marketing brief so your team can quickly understand the work request and get it done.

3. **Assign and track all ad-hoc work.** In order to keep everything functioning smoothly, it's important to know who is working on what, where it is in the process, and how much capacity team members have to take on new work. A good work management tool will allow the traffic manager to easily assign, prioritize, and track ad-hoc and strategic work as well as the visibility to know each resource's capacity to take on new ad-hoc requests.

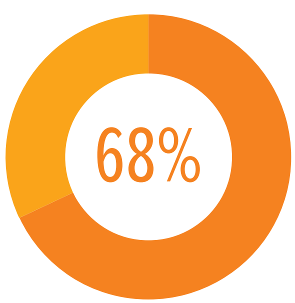
> Standardizing marketing briefs and requiring everyone to be involved helped one company drop the time spent writing a marketing brief and rolling out a new product from four months to just one.
>
> –McKinsey & Company[6]

2 No Good Way to Prioritize Work

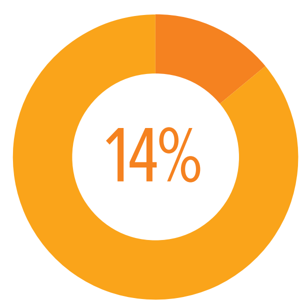
Simultaneously working on strategic projects, campaigns, and ad-hoc requests is difficult for marketing operations teams to manage. What projects or requests should take precedence? How does marketing operations ensure the most strategic work is always getting done first? And how do priorities get decided when work is being requested by multiple departments?

According to Craig Moore, service director of marketing operations strategies for Sirius Decisions, sales and marketing teams frequently lack clarity into each other's priorities. He notes that only 14 percent of B2B companies have a planning process that is integrated across both sales and marketing.[7] However, a key part of the marketing operations role is to help facilitate alignment between marketing and other teams.

Most marketing operations teams try to manage the integration process through spreadsheets, emails, and meetings. But over half of meetings are considered a waste of time[8] and spreadsheets are cumbersome to manage, frequently filled with errors, and lack real-time insight. Marketing operations teams need to stay agile when new high-priority work comes in, but current processes don't facilitate real-time decision-making, especially when trying to weigh priorities across teams and departments. Instead, team members are often left to try and figure out for themselves what to work on first, and frequently it's the loudest voice that wins—not the highest priority work.



68% of organizations said they had no systematic approach in place to prioritize projects or link them to corporate and strategic goals.[9]



Only 14% of B2B companies have a planning process that is integrated across both sales and marketing.[10]

Solution: Prioritize with Purpose

If your team wants to truly improve marketing efficiency for the organization, you must be strategic about your own work—ensuring that the highest-priority, most strategic work gets done first.

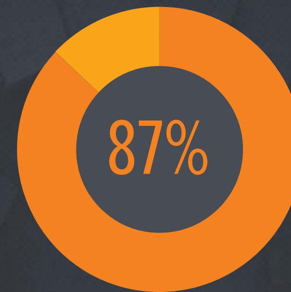
Here's how to make it happen:

1. **Develop a system for prioritizing the work.** Before you can effectively prioritize work, you need to define your priorities. Whether you decide to use a scorecard, a tiering system, or deadline or requestor importance to determine the priority of work, agree as a team on what metrics are most important. Then, as requests come in, use the metrics you've defined to prioritize the work.

2. **Go Agile.** Agile project management is all about staying flexible to accommodate a rapidly changing environment. Daily stand-up meetings (short 10 – 15 minute meetings) allow team members to discuss new work requests, including ad-hoc requests, and determine the priority of the work. Agile teams use a visual board, such as a whiteboard with sticky notes or a digital version with vertical "swim lanes" to help distinguish the work that needs to be done, the work in progress, and completed work. Team members can move sticky notes around as priorities change or work progresses.

3. **Get visibility into the workloads of your resources.** Prioritization goes hand-in-hand with knowing what work your team currently has on their plate and what their capacity is to take on new work. Without this information, everyone works in silos, team members get overburdened or under-utilized, and there's a lack of team vision around priorities.

4. **Designate a traffic manager.** This person is responsible for tracking, prioritizing, and assigning requests to team members. Depending on the size of your team and the number of requests your team receives, this can either be an administrative position or a job function of one of your team members, such as a campaign manager or marketing operations director.



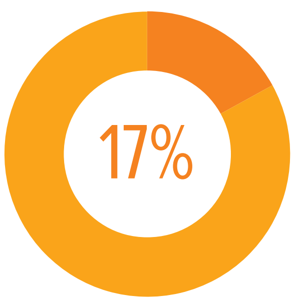
In a survey of CMOs and lead marketers, 87% said adopting Agile made them more productive.[11]

3 Communication Silos and Collaboration Breakdowns

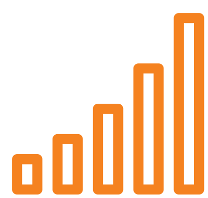
Collaborating and communicating across many departments is an essential function. Without good communication and collaboration, marketing operations teams cannot facilitate the changes necessary to improve marketing accountability, alignment, or agility. Instead, each department or team ends up working in silos with different goals and objectives.

Even when there is collaboration, miscommunication can happen. For example, if the marketing operations team doesn't get enough detail about a project request or struggles to get timely feedback from stakeholders throughout the project, they may have trouble meeting expectations.

In one survey, just 24 percent of salespeople said there is good collaboration between marketing and sales.[12] Yet research shows that collaboration with other departments is critical to marketing operation's overall success and their ability to align marketing priorities to corporate objectives. Organizations with sales and marketing functions that are closely aligned deliver better revenue performance.[13]



17% said a lack of integration with other business functions is the most significant barrier to improving the performance of marketing operations.[14]



Organizations with sales and marketing functions that are closely aligned deliver better revenue performance.[15]

Solution: Collaborate in Context

To break down communication silos, increase the fluidity of collaboration across departments, and keep the feedback loop flowing, marketing operations teams need to implement processes that allow for better collaboration and communication within the context of the work.

Here are three ways to keep collaboration tied to the work:

1. **Provide complete visibility into all communications.** Email is the most ubiquitous form of communication, but it doesn't provide much visibility. When information goes into an individual's inbox, it creates silos. Sending group emails can help, but these often result in long and confusing email chains where people frequently forget to hit reply all—once again leaving many team members out of the loop. Instead, move internal emails to a searchable, central discussion thread, message board, or social collaboration tool, so everyone has visibility. According to McKinsey, doing so could improve productivity by up to 35 percent.[16]

2. **Dump the spreadsheets for tracking work processes.** Tracking information on spreadsheets is another popular form of communicating about work. Spreadsheets, though, are riddled with inefficiency and errors. In one survey, 44 percent said they grapple with multiple, inconsistent spreadsheets, spending approximately 12 hours each month consolidating, modifying, and correcting the spreadsheets.[17] Instead, marketing operations teams should track work in a digital tool that will not only eliminate manual errors, but allow team members simultaneous access to make updates in real time.

3. **Use a digital proofing tool.** Using a digital proofing tool helps facilitate communication around documents, which can significantly speed up the review process and reduce miscommunication. In addition, it provides a way for everyone—marketing operations teams and clients—to collaborate in the same space and see the feedback from each other in real time.

Office productivity can be improved by up to 35% by moving internal emails to a searchable, central discussion thread, message board, or wiki site.[18]

4 Constantly Reinventing the Wheel

Marketing operations involves a lot of the same projects and tasks, again and again. Creating reports, marketing automation campaigns, and onboarding new technology vendors are all cases where the details may vary, but the steps to accomplish the task remain the same. Yet, many marketing operations teams haven't taken the time or steps necessary to standardize these processes.

When you don't reuse existing materials, or you have repeatable processes but don't use templates, you create additional, unnecessary work, which impacts the bottom line, efficiency, and productivity. According to one report on marketing operations, without a standardized and industrialized set of marketing execution processes, most organizations are doomed to slower cycle times, higher labor costs, and increased costs of quality.[19]

20% of those surveyed said inefficient business processes is the most significant barrier preventing their organization from further performance in marketing operations.[20]

Without a standardized and industrialized set of marketing execution processes, most organizations are doomed to slower cycle times, higher labor costs, and increased costs of quality.[21]

Solution: Standardize Processes

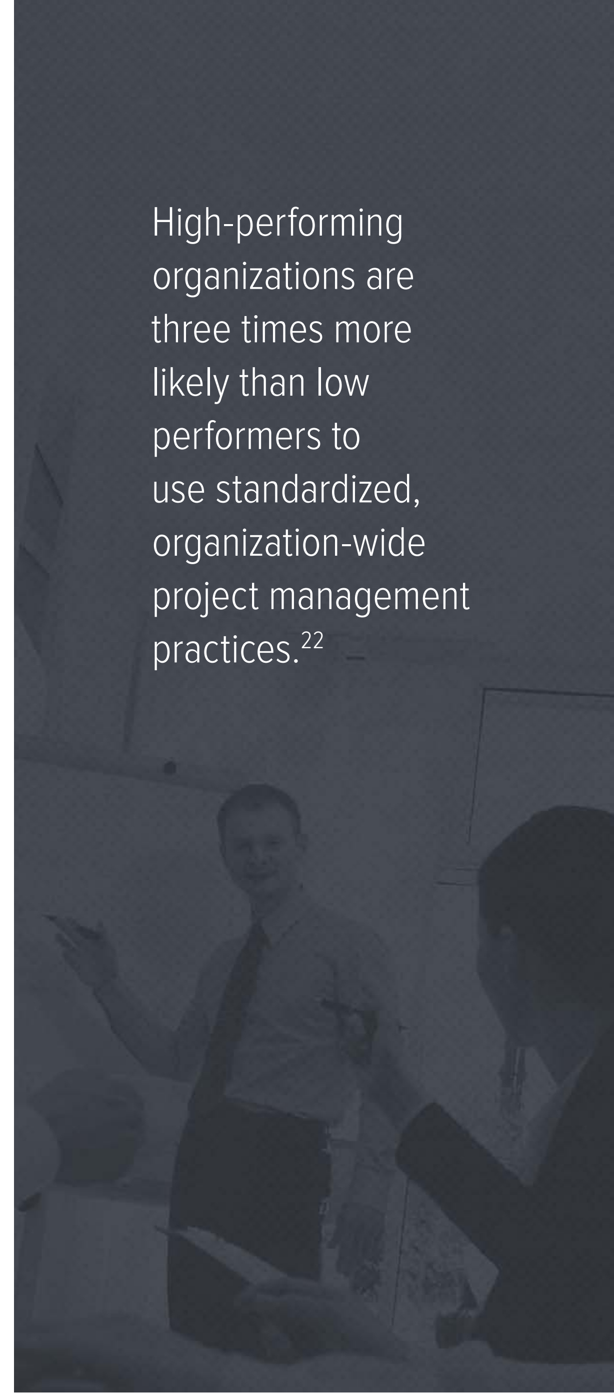
The key to saving time and increasing efficiency is standardizing the processes for the types of work that marketing operations teams do over and over again.

Instead of reinventing the wheel every time they start a new project for a stakeholder, marketing operations teams can and should standardize by:

1. **Capturing workflows in templates.** Create and apply templates to all common types of work requests. Templates help structure the work and standardize processes. Best practices for building templates include developing a complete task list, assigning job roles to tasks, and estimating the duration and planned hours of each task. To further improve your templates, create parent tasks for larger pieces of work and subtasks to break the work into smaller parts or to help with assigning the work to multiple job roles.

2. **Coordinating the effort.** Because marketing operations teams work across departments, it's critically important to map out each step to ensure that the transitions between different phases will be as seamless as possible. It's important that everyone involved has a comprehensive view of the workflow, knows when things need to get done, what tasks they need to do, who will be waiting on them to finish their parts, and who they pass their part on to next. By coordinating these steps at the start, you'll avoid delays and rework by completing tasks out of order, and deadlines will stay on track.

3. **Standardizing the common flow of approvals.** To avoid having work hung up waiting for approvals, create approval templates, and automate the process when possible. Templates should map out when in the process the asset needs to be reviewed and by whom. Automating the approval process through templates or through a work management tool will save even more time. Instead of alerting the people involved, gathering documents from several different locations, and contacting approvers for updates, your team can spend that time on productive work.

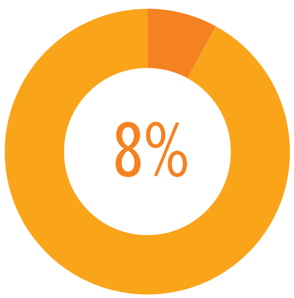


High-performing organizations are three times more likely than low performers to use standardized, organization-wide project management practices.[22]

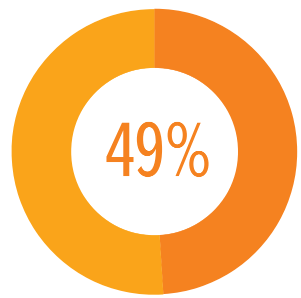
5 Proving Your Team and Marketing's Value

Only eight percent of CFOs said they trust the marketing department's ability to spend its budget wisely,[23] and less than half (49 percent) of executives rate their company's overall marketing operations as industry leading or above average.[24] With statistics like this, marketing as a whole is feeling the heat to prove their value to the organization.

While marketing operations teams may be busy tracking the ROI on a technology purchase or providing analysis on how a specific campaign performs, they often overlook managing, tracking, and analyzing the overall organizational value marketing provides. But, tasked with financial governance as well as strategic planning and process development for marketing, marketing operations own value is only as strong as the value and effectiveness of the organization's overall marketing efforts.



Just 8% of CFOs trust marketing's ability to spend its budget wisely.[25]



Only 49% of executives rate their company's overall marketing operations as industry leading or above average.[26]

Solution: Track the Data So You Can Prove Your Worth

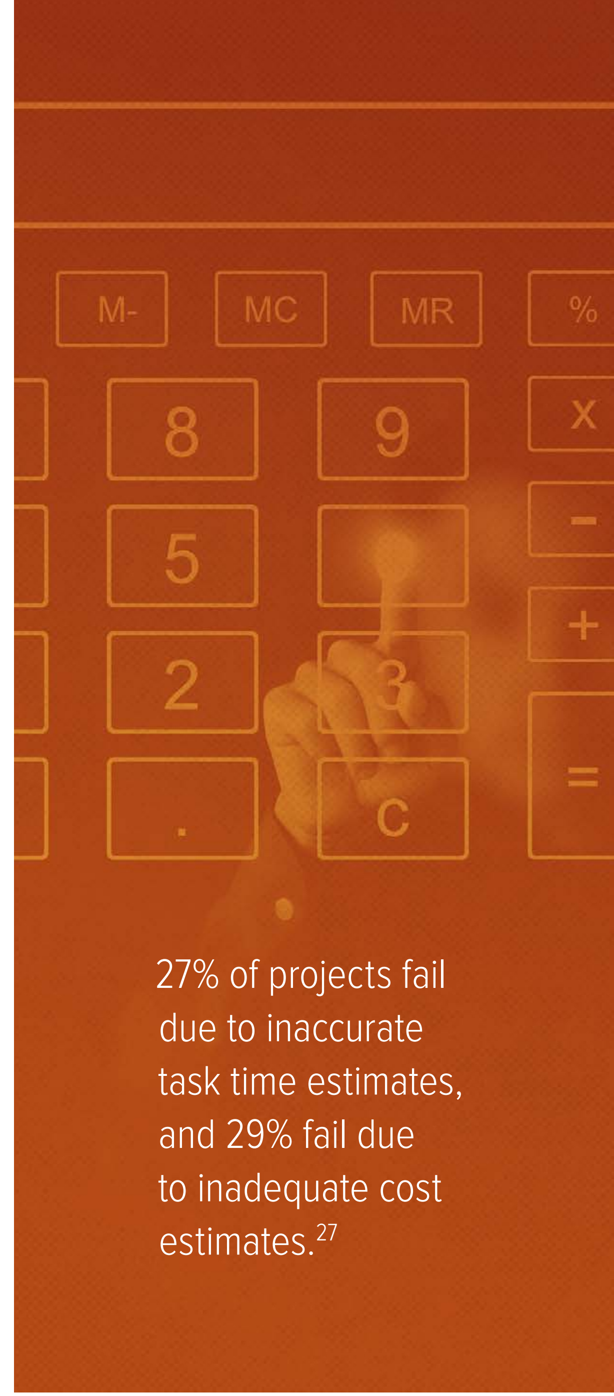
Many marketing operations teams are so busy tracking individual campaigns, they're not tracking and analyzing the overall effectiveness of the marketing department. But without proof that they are an agent of change—increasing marketing's alignment, accountability, and agility—marketing operations teams have no proof of their own value to the organization.

Here are three ways to track and measure marketing effectiveness:

1. **Track marketing's time.** Time tracking is the foundation of all other work-process metrics. Knowing who is spending how much time on what will help you evaluate resource effectiveness, accurately estimate resource costs on projects, and understand where there may be bottlenecks.

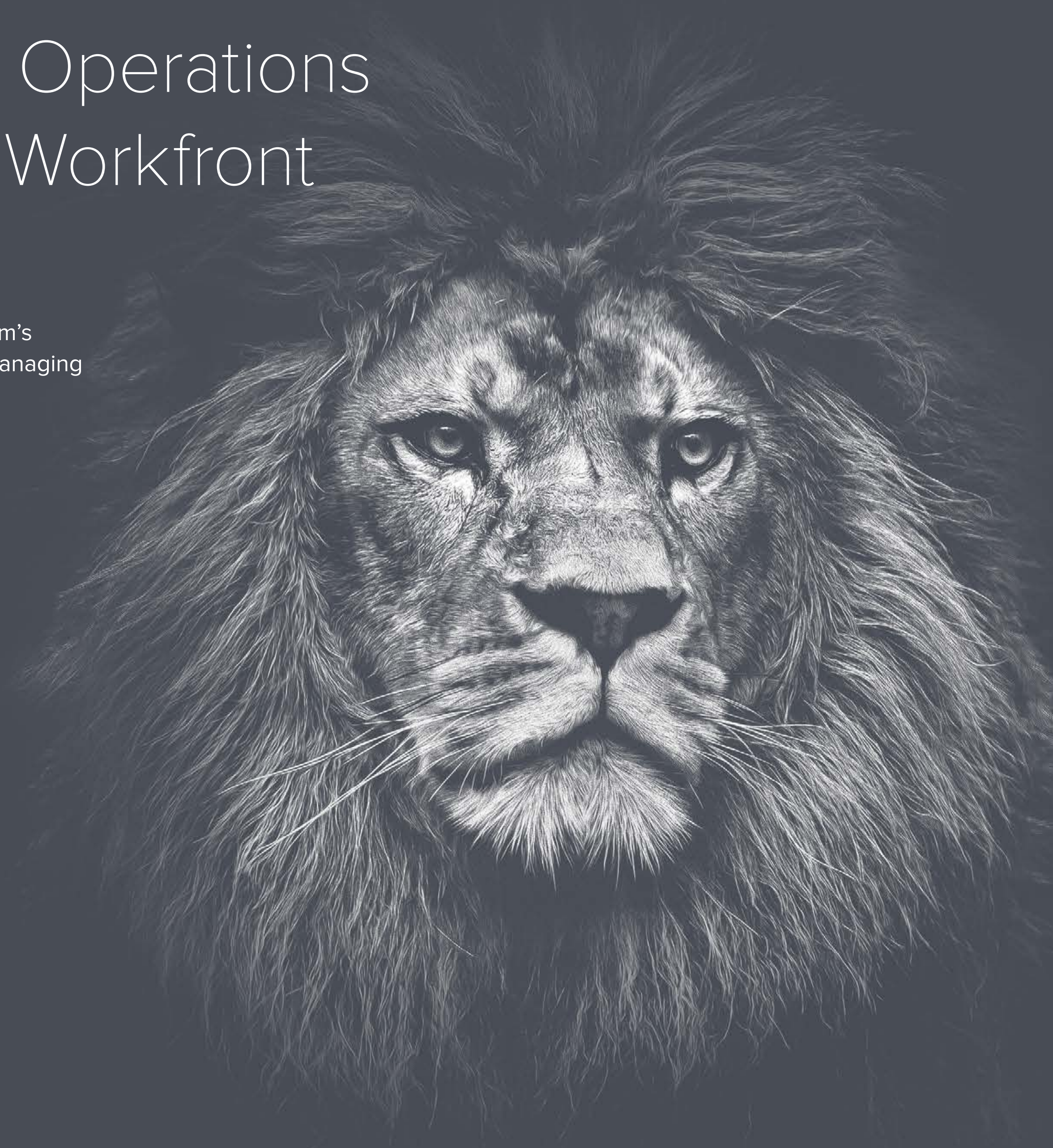
2. **Track planned vs. actual budgets.** Show how well marketing does at understanding the costs upfront and staying within the budget while delivering results. To track this data, you need to understand the costs of each project and campaign. Keeping this information in a central location where you can compare historical data, resources used, and unplanned expenses will help with future planning.

3. **Provide executives with real-time visibility into marketing work processes.** Use dashboards to give executives real-time visibility into the marketing team's time schedules, budgets, and more. You can create dashboards manually, but using a work management system can automate the process and ensure insights are provided in real time.



27% of projects fail due to inaccurate task time estimates, and 29% fail due to inadequate cost estimates.[27]

Propel Your Marketing Operations Team to Success with Workfront



The right tools can help you increase your marketing operations team's value in measurable ways. Embracing a more holistic approach to managing your team's work with a Marketing Work Management solution like Workfront, will help you:

- Work more efficiently
- Increase productivity
- Build credibility
- Improve communication
- Focus more time on strategic work

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