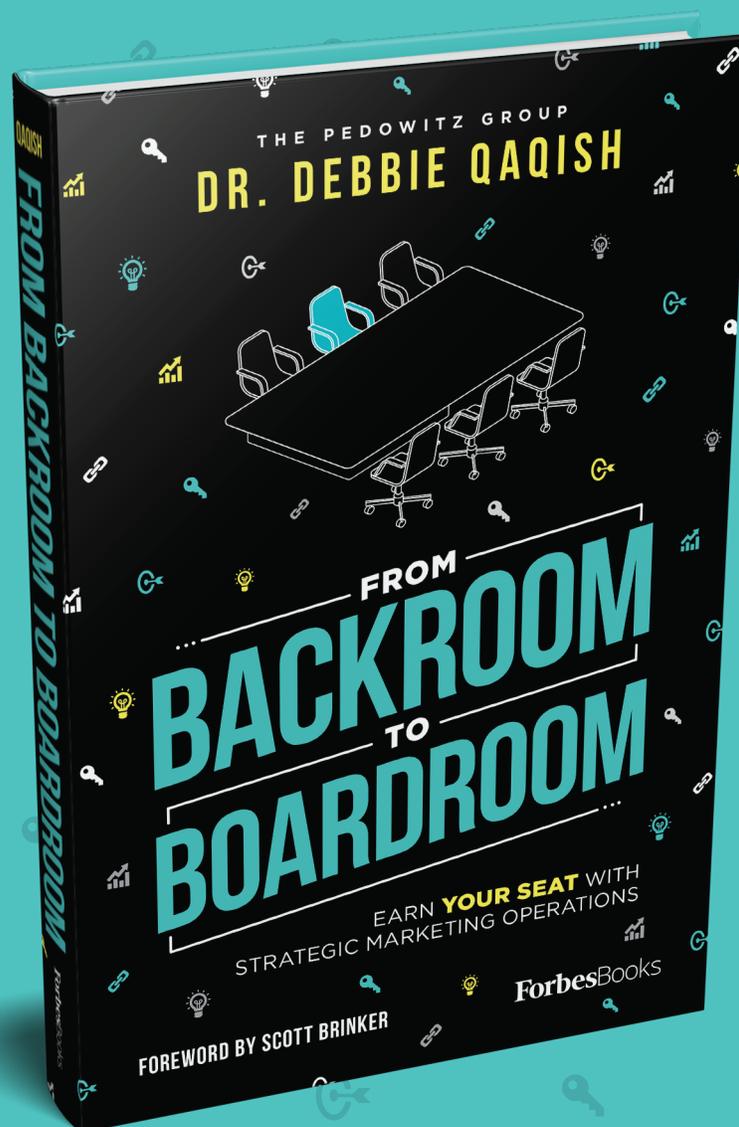


STRATEGIC MARKETING OPS WORKBOOK

BY DR. DEBBIE QAQISH

To be used after reading From Backroom to Boardroom:
Earn Your Seat with Strategic Marketing Operations



The Strategic Marketing Operations (SMO) Workbook	3
Introduction	3
How to Use the SMO Workbook	3
Section I: Conduct a Discovery	4
1. Definition	4
2. Overview	4
Exercise 1: Gather Company Goals and Initiatives	5
Exercise 2: Gather Marketing Goals and Initiatives	6
Exercise 3: Assess Your Level of MO Maturity	7
Exercise 4: Gather Data About State of Your Martech Ecosystem	8
Exercise 5: Gather Data About Skills and Talent	10
Exercise 6: Conduct Stakeholder Interviews	11
Exercise 7: Gather Data on Challenges and Accelerators	12
Exercise 8: Gather Data on Metrics	13
Section II: Create a Vision and Mission	14
1. Definition	14
2. Overview	14
Exercise 1: Create a Why-How-What for a Strategic MO	15
Exercise 2: Create a Vision & Mission Statement for a Strategic MO	16
Section III: Implement Change Management	17
Definition	17
Overview	17
Exercise 1: Build a High-Level Roadmap	18
Exercise 2: Build a Communication Plan	19
Exercise 3: Build a Training Plan	20
Appendix	21
Figure 1: Marketing Operations Maturity (MOM) Model	21
Figure 2: MOM Model Characteristics by Stage	22
Figure 3: MO Skills Chart	23
Figure 4: MO Communications Characteristics	23
Figure 5: Sample Martech Roadmap	24
Figure 6: Sample MO Metrics	25

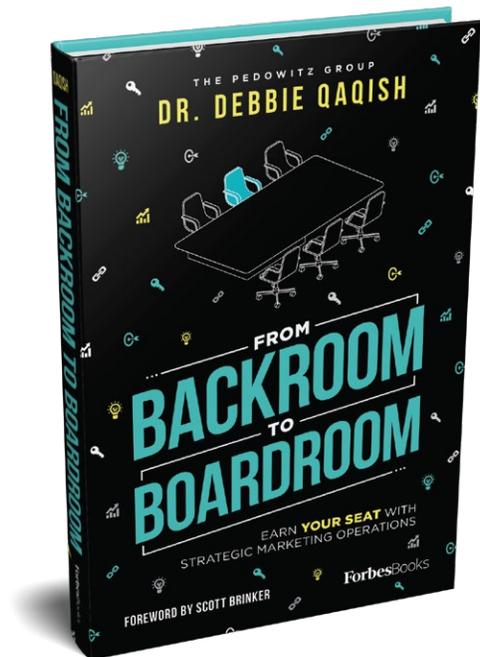
THE STRATEGIC MARKETING OPERATIONS (SMO) WORKBOOK

INTRODUCTION

Welcome! If you have this SMO workbook it means that you are looking for ways to up-level your marketing operations organization. Smart move! This SMO workbook is an excellent place to start.

I developed this SMO workbook as an accompaniment to my latest book – From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations. Once you have read the book, you will have the key concepts and principles that you can then apply to the set of exercises contained in the SMO workbook.

[For a copy of the book, visit Amazon.](#)



HOW TO USE THE SMO WORKBOOK

There are three major sections to the SMO workbook: I. Discovery, II. Vision, Mission and Brand and III. Change Management. Each section contains instructions and a set of exercises that will help you up-level key areas of your marketing ops function. I recommend you do the exercises as a team effort. Getting the entire marketing ops team involved in this process will result in team buy-in, improved outcomes and a shared passion and vision for change.

SECTION I: CONDUCT A DISCOVERY

1. DEFINITION:

The activity of gathering and processing data from multiple sources required to develop the key strategies and tactics for building, executing, and institutionalizing a strategic MO function.

2. OVERVIEW:

The discovery process for becoming a strategic MO organization includes gathering and processing data from seven different areas:

1. Company & MO Goals and Initiatives
2. Marketing & MO Goals and Initiatives
3. The Marketing Operations Maturity Model – Where are you?
4. MarTech Ecosystem
5. Skills and Talent
6. Key Stakeholder Views
7. Metrics & Insights

EXERCISE 1: GATHER COMPANY GOALS AND INITIATIVES

“The first two areas of discovery—company and marketing initiatives and goals— are foundational to what you will become as a strategic MO organization. At a company level, if you can’t tie to a strategic initiative or set of goals to demonstrate how strategic MO can better enable that effort, it will be challenging for you to grow. You can’t grow a plant in sand (at least, most plants), and you have to have fertile soil for it to flourish. Understanding company goals and creating the case for how MO plays a role in achieving those goals is where it all begins.”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Answer, Document and Discuss the following questions.

Deliverables: Create a PPT with the final answers that you can use for review, guidelines, prioritization and socialization.

Questions:

1. What are the big company goals for the year?
2. What are the key initiatives in marketing, MO, sales and customer success that support the big company goals for the year?
3. How can the MO organization support/enable/improve achievement of the big company goals and/or the key initiatives?
 - a. What are the key initiatives of the MO organization?

EXERCISE 2: GATHER MARKETING GOALS AND INITIATIVES

“Marketing goals are next. They must be aligned to company goals because MO lives (most of the time) in marketing. As a result, if marketing leadership is working in an ivory tower and disconnected from helping to drive business results, you will be challenged in growing MO.

I find that when MO begins to mature as a capability, most marketing groups are relieved. They understand that with MO they have a much better chance achieving their goals. I share this observation because part of your discovery process may involve helping marketing evolve in how they align to company goals, and you need to know what you’re potentially getting into.

The deliverable from this part of the discovery process is an integrated set of initiatives and goals between marketing and the company that is driven by MO. This might be in terms of accelerating current actions or helping to drive something new; the important thing is that everyone comes to agreement on what they are.”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Answer, Document and Discuss the following questions.

Deliverables: Create a PPT with the final answers that you can use for review, guidelines, prioritization and socialization.

Questions:

1. What are the big marketing goals for the year?
2. Are they aligned to the big company goals?
3. What are the key marketing initiatives that support the big marketing goals?
4. How can the MO organization support/enable/improve achievement of the big marketing goals and/or the key initiatives?

EXERCISE 3: ASSESS YOUR LEVEL OF MO MATURITY

“Since this MOM model is so important, I consider it the foundation of the book and for up-leveling any MO organization. Once you’ve reviewed it and have read the information that corresponds with it, I think you’ll agree. Using this model is like having a north star. The model acts as a guiding light that will direct you on the path to create a strategic marketing operations capability.”

The MOM model provides a picture of the different stages of maturity for marketing operations capabilities, not just structure. MO professionals can use it to think about where they are, where they need to go and how they will get there.

The MOM model helps you understand the complexity of marketing operations capabilities at different stages of maturity. There are five stages: Unaware, Efficient/Effective, Get Revenue, Customer Centric and Next Generation.”

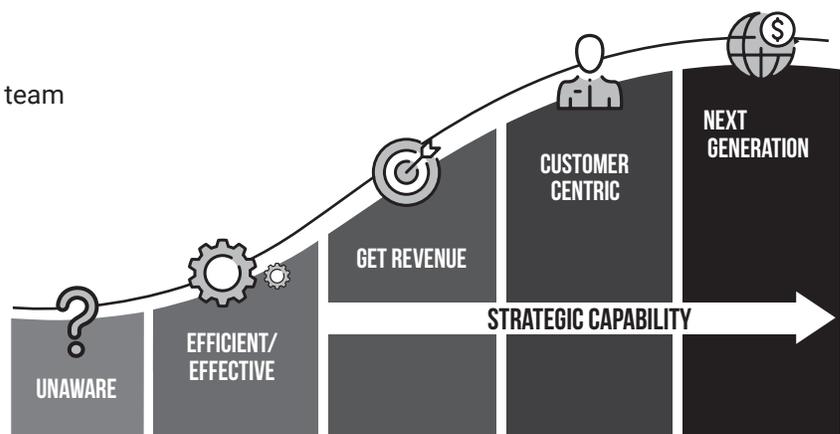
From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 3

Directions: Take the following actions.

Deliverables: Create a PPT with the action results that you can use for review, guidelines, prioritization and socialization.

Actions:

1. Review the chapters on the MOM model
 - a. Chapters 3, 4, 5, 6 and 7
2. Review Figure 3.2 – The Marketing Operations Maturity (MOM) Model
3. Review Figure 11.6 - The MOM Model Characteristics by Stage model
4. [Take the online assessment](#)
5. Review and discuss your results as a team



EXERCISE 4: GATHER DATA ABOUT STATE OF YOUR MARTECH ECOSYSTEM

“Regarding a martech catalog, I always tell my clients that you can’t measure what you can’t see. Yet it is common for us to work with MO groups that do not have either a catalog of systems or a sense of the wellness of their ecosystems. Here is a quick challenge: Can you pull up, on one page, a document that represents the total picture of your martech systems? If you have a list of technologies, or—even better—a graphic of all the systems you have and how they work together, bravo! You are way ahead of many organizations. If not, your job starts with creating a martech catalog.

A martech catalog is similar to a martech inventory, but it has more information than just a list of systems. Include in your catalog a reference to who uses the system and why. Consider how optimized the use of that system is, and if there is another system that might be used to accomplish the same thing. Is it the best system to accomplish the goal or task? Who else needs to accomplish a similar task? What are the costs? And don’t forget to ask: Where are the gaps—what technologies do you not have that you need?”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 4

Directions: Answer, Document and Discuss the following questions.

Deliverables: Create a PPT with the final answers that you can use for review, guidelines, prioritization and socialization. Create YOUR MarTech Catalog.

Questions:

a. Create a MarTech Catalog

a. Systems 101:

- i. What systems do you have?
- ii. Who is using each one, why and how?
- iii. Who else could be using a system (anywhere in the company, not just in marketing) – for what and why?
- iv. How aware is everyone of all the tools available in the stack?

b. Playing Nicely Together:

- i. What is the state of integrations?
- ii. What is the state of optimization for each system used?
- iii. What is the state of relevance (do you have the right tool for the job?)

c. Decision Making:

- i. How are martech purchase decisions made?

d. Data:

- i. What is the state of your data?
- ii. How is data used, by whom and for what?
- iii. Where are the gaps?

e. Cost Structure:

- i. What are the martech costs?
- ii. Where are there system redundancies?
- iii. How effectively are the martech contracts managed?
- iv. How effectively are martech vendors managed?

f. Alignment to Goals:

- i. How aligned is the martech ecosystem to goal and initiative attainment?

EXERCISE 5: GATHER DATA ABOUT SKILLS AND TALENT

“A critical leadership role is defining the skills needed, both for today and tomorrow, in the strategic MO function. Conducting a skills assessment allows you to define these skills. The exercise will help you validate what you have and determine what you need for today and tomorrow. From here, you can better determine your talent acquisition strategies and the key leadership essentials you’ll need to bring to the table.”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 8

Directions: Take the following actions.

Deliverables: Create a PPT with the action results that you can use for review, guidelines, prioritization and socialization.

Actions: Conduct a MO Skills Assessment

1. Review the Marketing Operations Skills chart.
2. Using the MO Skills chart as the baseline for a strategic MO organization, have managers complete a current skills inventory across the entire MO group. You might try using a scoring system of 1-3 for each item. 1 is “Does Not Have the Skill,” 2 is “Proficient in the Skill” and 3 is “Excels at the Skill.”
3. Using the MO Skills chart as the baseline for a strategic MO organization, have managers complete a future skills inventory needed. The future skill set will be based on your goals.
4. Determine the skills gap you need to address by role and for the organization.

MARKETING OPERATIONS SKILLS CHART						
INTERPRET AND DRIVE BUSINESS GOALS						
TECHNOLOGY, DATA & ANALYTICS			PROCESS ENGINEERING	PROJECT MANAGEMENT & TRAINING		CHANGE MANAGEMENT & CUSTOMER INSIGHTS
MarTech Stack	Data	Performance Management	Across Functions	Project Management & Budget	Training and Education	Across Functions
<ul style="list-style-type: none"> • Cross-Functional Strategy • Cross-Functional Road map • Vision • Interpreter • Selection • Integration • Optimization • Manage Infrastructure • Admin • Vendor Management • Scanning 	<ul style="list-style-type: none"> • Cross-Functional Strategy • Cross-Functional Road map • Strategy • Governance • Insights • Quality • Cleanliness • Optimization • DB Management • Data Management • Predictive • Warehouse • BI 	<ul style="list-style-type: none"> • Reporting • Analytics • Insights • Metrics & KPIs • Dashboards • Funnel Management • Operational Insights • Customer Intelligence 	<ul style="list-style-type: none"> • Funnel Management • Lead Management • Lead Life Cycle • Lead Conversion • Customer Buyer Journey • Personas • Campaign Operations • Segmentation • Content Operations • Shared Services Ops • Ticketing System • Insights • Optimization • Consulting • Best Practices • Performance Management 	<ul style="list-style-type: none"> • Professional Project Management • Budget & Budget Tracking • Financial Compliance 	<ul style="list-style-type: none"> • Training on New Systems • Training on New Processes • Training on Marketing Operations Skills • Marketing Enablement in Tech and Data 	<ul style="list-style-type: none"> • Change Agent • Visionary • Strategy to Action • Collaboration, Communication & Influence with Key Stakeholders • Empower Accountability • Dive innovation • Create Actionable Customer Insights for All Key Stakeholders

EXERCISE 6: CONDUCT STAKEHOLDER INTERVIEWS

"I recently worked with a company that was transitioning to have all campaigns built and executed in the new MO organization. During the key stakeholder interview process, MO leaders asked questions about challenges with the current campaign process. The answers gave them ideas for how to consolidate efforts in a way that would benefit every part of the organization.

The story reinforces the fact that one of the most vital parts of the discovery process is to interview key MO stakeholders both in marketing and outside of marketing. You can find out what they need and what they are not getting that you might be able to provide. In these interviews, you also begin to set the stage for change.

The deliverable from this discovery effort is a set of What's In It For Me (WIIFM) statements for each key stakeholder group. These statements are baked into your messaging about what you are changing in MO and why. The wording will help communicate how the change will benefit different constituents, which is essential to the Communication Plan."

Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Take the following actions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include the WIIFM statements for each stakeholder group.

Actions:

1. Conduct a series of interviews to ascertain perceptions, opinions and insights on the role of MO
2. Sample stakeholders
 - a. Head of each part of marketing
 - b. Head of sales
 - c. Head of inside sales
 - d. Head of business development reps
3. Sample questions
 - a. What do you believe the role of MO is today?
 - b. What do you believe the role of MO should be?
 - c. How can we improve MO's contribution to the company?
 - d. How can MO make your life better?

EXERCISE 7: GATHER DATA ON CHALLENGES AND ACCELERATORS

"I've always asked marketers about their challenges. They usually share a data dump. I have never trivialized this information: it is important to be very realistic about the challenges in transforming into a strategic MO organization.

However, in the past I always felt like something was missing, and it was the accelerators. If there were challenges that were getting in the way, surely there must be some accelerators that would speed things up. A few years ago, I began incorporating accelerators into my discussions. Accelerators are any key initiatives in the company that the MO team might associate with and, as a result, accelerate their journey to strategic MO.

An example might be when a company is pivoting from a product-first to a customer-first strategy. Strategic MO is often in a position to greatly influence this change, as they have a treasure trove of behavioral customer data and can get data more quickly using a variety of marketing tactics. The key to determining your accelerators is to simply look around your company for any key business initiative to which you might attach.

The deliverable from this stage of the discovery is a set of challenges you will need to tackle and a set of accelerators to which you might attach. The accelerators form a good part of the business case you are building for a strategic MO."

Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Answer the following questions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include a complete set of challenges and accelerators.

Questions:

1. What are the challenges to MO becoming a strategic MO organization?
2. What are the accelerators for MO becoming a strategic MO organization?
 - a. Accelerators are actions already in flight in the company that you can attach to

EXERCISE 8: GATHER DATA ON METRICS

“Metrics flavor everything in marketing today. There are metrics a strategic MO group can drive that may be net-new to marketing, such as contribution to pipeline. There are also metrics that a strategic MO organization can use to benchmark their own journey, like the percent of integrations complete and optimized in the martech stack, or the number of key processes mapped and operationalized through systems and data. There is no favorite here—both types of metrics are important.

The deliverable from this stage of discovery includes metrics that matter to the business, such as pipeline contribution or a set of customer engagement metrics. They also include metrics for how the MO function is growing and improving.”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Answer the following questions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include a complete set of metrics that matter to the business and that shows MO maturing as an organization.

Questions:

1. List key metrics you track today. Include:
 - a. Operational metrics
 - b. Revenue metrics
 - c. Martech health metrics
 - d. Marketing Ops maturity metrics
2. What is missing?
3. List metrics you need to track in the future.
 - a. How will you close the gap?

SECTION II: CREATE A VISION AND MISSION

“Starting with your corporate vision and mission statements not only puts you on the right track; it also helps keep you there. A vision statement is an aspirational statement for what you want to become or what you want to affect. A mission statement is how you aim to get there. A brand identifies who you are and why you are better. All three are particularly important when you make big changes in MO—they become foundational to your stump speech and serve as a guiding light for your team.

I always suggest to an MO organization that wants to change and become more strategic to begin with a vision statement and a mission statement. After all, if you are not vividly clear on who you are, what you stand for and where you are going as an organization, neither will anyone else. You will continue to be viewed as the Button Pushers.

For many MO teams, this exercise may feel out of their comfort level. However, I’ve seen this exercise make a huge impact on the team. They feel proud to be a part of something that has direction and meaning. They feel energized, motivated and inspired. The exercise is essential to the rebranding of who you are as a team.”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

1. DEFINITION:

A vision is an aspirational statement for what you want to become or what you want to affect. A mission statement is how you plan to get there. A brand identifies who you are and why you are better.

2. OVERVIEW:

Now that you have completed the Discovery process and have a solid understanding for where you are, it is time to set your north star and plan how to get there. There are three exercises in this section:

- a. Create a MO Why-How-What statement
- b. Create a MO Vision
- c. Create a MO Mission

EXERCISE 1: CREATE A WHY-HOW-WHAT FOR A STRATEGIC MO

Directions: Take the following actions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include your Why-How-What statement.

Actions:

1. As a MO team, create a compelling – WHY-HOW-WHAT statement for MO. [Review Simon Sinek's TedTalk - How Great Leaders Inspire Action](#) to complete this action.
2. Craft your own why-how-what statements reflective of a strategic MO org.
3. Role Play – Practice delivering the statement.

EXERCISE 2: CREATE A VISION & MISSION STATEMENT FOR A STRATEGIC MO

"A vision statement is an aspirational statement for what you want to become or what you want to affect. A mission statement is how you aim to get there."

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Take the following actions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include your vision and mission statement.

Actions:

1. Work with the MO team to create a vision and mission statement. Think big. Be aspirational.
2. Socialize the vision and mission statement:
 - a. In your communication plan
 - b. In all presentations you do in the company

SECTION III: IMPLEMENT CHANGE MANAGEMENT

“Too often change management is an after-thought, if a thought at all. Here is an example. In 2019 I attended a session at MarTech where the presenter discussed how she built an MO team from scratch. She expounded on all the elements of change management they used to ensure the success of the new organization. What struck me most about this talk was her emphasis on change management, not systems or data. I thought it was interesting that when building a MO team from scratch, change management was identified as a critical success factor yet, when transforming a current team, change management is often not on the menu.”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

1. DEFINITION:

A **systematic approach** to dealing with the transition or transformation of an organization's goals, processes or technologies. The **discipline** that guides how to prepare, equip and support **individuals** to successfully adopt change in order to drive organizational success and outcomes.

2. OVERVIEW:

For the MO organization in transition, change management has two primary elements: what to communicate and how to communicate. The what is a Roadmap and the how is a Communications plan.

EXERCISE 1: BUILD A HIGH-LEVEL ROADMAP

"To put substance behind the vision, you must have a roadmap. The roadmap includes a high-level view of how change will happen in stages and over time. The roadmap gives team members a sense of direction and a way to provide invaluable input on the journey. People can then feel like they are participating in the change. The roadmap is also your main document for communicating change in MO to every part of the organization."

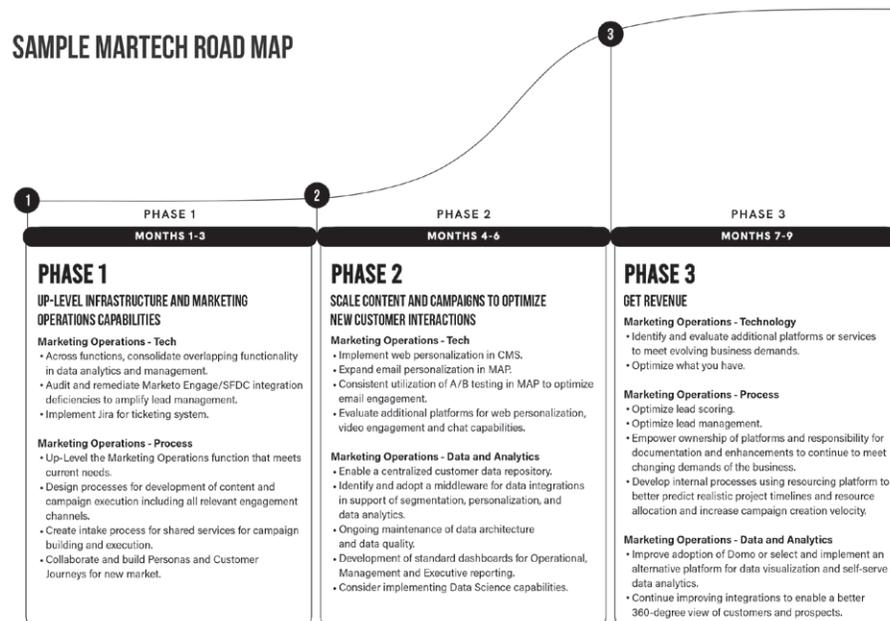
From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Take the following actions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include your Roadmap.

Actions:

1. Review the sample Roadmap.
2. Take everything you have gathered, learned and processed up to this point and create a high-level roadmap for your transformation. You might include martech, people, skills, org structure, results, processes, data etc.
3. Includes the big pillars of your transformation with key milestones.
4. Under each pillar will be initiatives and tasks.
5. Keep high level so you can use this as a communication tool up, down and across the organization.
6. Build out at least 6 months and no more than 18 months.



EXERCISE 2: BUILD A COMMUNICATION PLAN

“Inherent in this discussion so far is the importance of communication to help drive change. The powerful change tactic involves building an intentional and multi-channel communication plan that is based on individual stakeholder personas. If this sounds like how you build a campaign, that’s because it is! Begin by identifying all the key stakeholders that will be affected by the change—both inside and outside of marketing. Then create value statements for each persona that you can use in messaging the change.

Consider, too, the channels of communication you will use. The channels can be internal company sites, email, company meetings, sales meetings or water cooler meetings. As much as possible, try to use your marketing automation system as one of your channels of communication so you can see and track engagement with your messages. Even though this change management tactic seems so practical, it is very underutilized by marketing.

Another way to reinforce change is to copy political campaign best practices. From a practical perspective, you should write a stump speech and then present it at every possible meeting and event. Everyone will know where you stand and what you believe.”

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Take the following actions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include your final communication plan.

Actions:

1. Review the sample Communications Characteristics plan.
2. Use everything you have created as content and messaging for your communication plan.
3. Create personalized messaging based on stakeholder persona.
4. Decide on content types for communication.
5. Decide on channels of communication.
6. Decide on frequency of communication.

COMMUNICATION CHARACTERISTICS FOR XYZ COMPANY PLAN

Communication Characteristics	Description of the Communication Characteristics	Action	Due Date
Intent	Every communication has a specific intent or purpose – Inform, Educate, Influence, Request or Collaborate. Inform – to give facts or information. Educate – to give facts or information relevant to a job. Influence – to indirectly effect behavior or action. Request – to directly effect behavior or action. Collaborate – work jointly on an activity, especially to produce or create something.	Inform, Educate, Influence, Collaborate	11/1
Theme & Topics	Every communication has a specific theme communicated through a series of topic types. The topics might include Updates, Milestones Achieved, Best Practices Learned, Success Stories, Client Experiences, Anecdotes and Metrics.	Theme: COE Topic Types: Updates, Milestones, BP, Success Stories, Metrics	11/1
Cadence	Planned	TBD	11/1
Source	For an effective change management communication plan, communications may come from different sources and different voices.	Execs + Selected Peer Champions	11/1
Target Audience	Creating the right message, at the right time for the right person is the mantra of a successful communication plan. Each target audience represents a persona. The target audience for this comms plan includes the entire marketing organization at XYZ Company.	More specifically, Global Campaigns, MarComm, BU Marketing, Marketing Operations, Field Marketing & Agencies.	11/1
Flow	Bi-Directional means that when a communication is sent to a Persona, they can communicate back.	Open to Q&A in Teams & in meetings	11/1
Channels	Channels represent the different channels for the communication flow including digital channels	Teams, Team meetings, CMO meetings and comms, Video, ROADSHOW	11/1
Content Type	Content type refers to the format of the content. It might be email copy, a short video, a PPT, a report, etc.	Email, PPT, Teamschats, Video and COE Playbook	11/1
Call To Action	Every communication needs a specific call to action (CTA).	TBD for each comms element	11/1
Measurement	Level of Engagement (Opens, Click-thrus, Downloads, Return, Visits, % of Population Engaged, % of Functions Engaged, # of comms from Champions or Change Agents, etc.	Depends on views in Team and COE site	11/1
Resources Required	Comms Leader	Ian to participate in all channels	11/1

EXERCISE 3: BUILD A TRAINING PLAN

"I recently consulted for a US-based company that was moving to a new organizational structure in marketing. They were doing this so they could better implement the Agile methodology. The initiative took place company-wide, and marketing was struggling to execute the move. While the reporting structure remained similar, the work structure was becoming very different.

To address this huge change, this company created a series of "A Day in the Life" scenarios for the broad marketing teams. They also made more specific "Day in the Life" scenarios for specialized teams. Everyone was required to go through the scenarios, take a series of tests and get certified in the new work approach. While it was difficult to make the time for this training, the end results were twofold: improved cross functional team interactions and higher productivity.

The point is, don't forget about training—not just on technology, but in other softer areas around change. For your company, that might be improved communication skills, how to work on a cross-functional team or how to act like a consultant to other parts of the business. "

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 10

Directions: Take the following actions.

Deliverables: Create a PPT with the consolidated results that you can use for review, guidelines, prioritization and socialization. Include your final training plan.

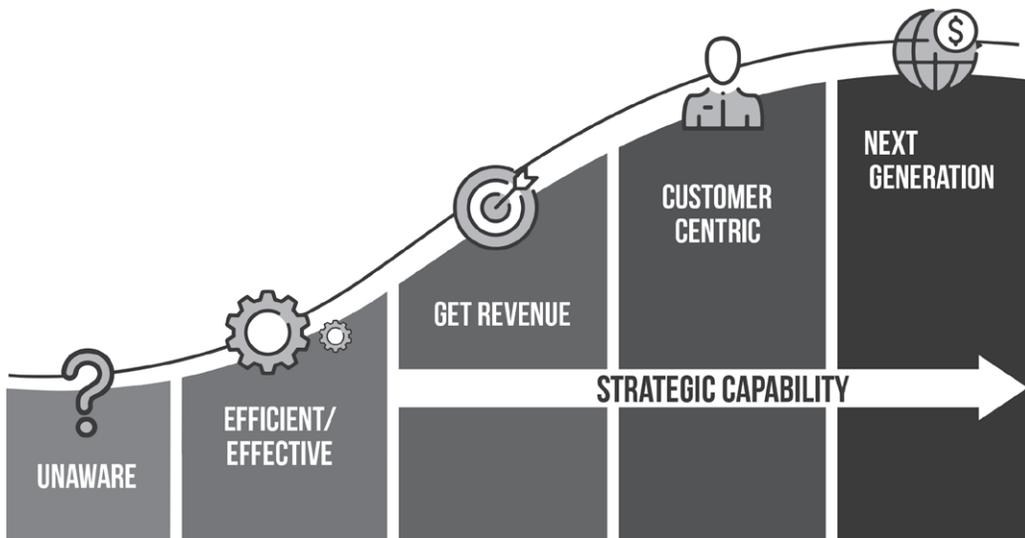
Actions:

1. Review the skills inventory and gap assessment you created in Discovery, Exercise 5.
2. Create a comprehensive training plan – see Chapter 9
 - a. Content creation options: Buy, build or conduct on-the-job training
 - b. Training topics: Anything from the MO Skills chart
 - c. Delivery option: In-person, online live or online on-demand
 - d. Track training completion and results
3. Other Actions:
 - Create specific role descriptions and career paths based on specific skill sets—both soft and hard.
 - Create a development plan that includes rotations in all parts of marketing with certifications in communications, consulting, and the core aspects of technology and analysis.
 - Hire a technical skill set, and have them take a rotation in marketing. Add a basic marketing training curriculum.
 - Hire someone with marketing or business acumen (or both), and have them take a rotation in some aspects of technology and analysis. Add levels of technical training to the curriculum that can be achieved over time.
 - Award badges and certifications. Gamify where you can.

From Backroom to Boardroom: Earn Your Seat with Strategic Marketing Operations, Chapter 8

APPENDIX

MARKETING OPERATIONS MATURITY (MOM) MODEL



MOM MODEL CHARACTERISTICS STAGE

This model is additive. Each next stage adds new characteristics and retains all the prior positive characteristics.

MOM Stages of Maturity	1. Unaware	2a. Efficient—Doing things well	2b. Effective—Doing the right things	3. Get Revenue	4. Customer	5. Next Gen
Charter	No charter	To begin digitally transforming marketing by selecting, implementing, integrating and optimizing various marketing technologies. It is also important at this stage to introduce an analytics and data capability into the marketing organization.	To digitally transform marketing by marrying process and technology to improve the efficiency and effectiveness of marketing operations. Essential to this part of digital transformation is reengineering core marketing processes that enable marketing to obtain stated goals.	With digital transformation as the baseline, to enable marketing to hit the revenue number through process, technology and analytics.	With digital transformation as the foundation, to enable marketing to hit the revenue number by adding a strong customer capability requiring focus, understanding, customer data, customer metrics and customer analytics.	With digital transformation as the foundation, to build a unified operational capability that improves revenue performance through one line of sight to the customer.
Strategy	Marketing is a cost center. Reactive to marketing needs.	Marketing is a cost center. Reactive to marketing needs.	Marketing is a cost center. Reactive to marketing needs.	Marketing is a revenue center. Proactive to marketing driving revenue and needs of the business.	Marketing knows the customer better than anyone. Owns the customer journey. Proactive in understanding the customer and applying to needs of the business.	Everything is consolidated. One line of sight to revenue and customer. Owns a number and the customer journey. Proactive
<i>Focus</i>	Focus on marketing (internal)	Focus on marketing (internal)	Focus on marketing (internal)	Cross-functional focus (internal and external)	Cross-functional focus (internal and external)	Cross-functional focus (internal and external)
<i>Structure</i>	Traditional marketing structure	Dedicated structure for MO	Dedicated structure for MO	Dedicated structure for MO in marketing, collaborative cross-functional structure	Dedicated structure in marketing, collaborative cross functional structure	New consolidated operational org structure, new executive reporting structure. Beginning of Revenue Operations
<i>Reporting</i>	Reports to traditional CMO	Reports to Operational CMO	Reports to Operational CMO	Reports to CMO with a quota	Reports to CMO who may also be the CCO	Reports to head of operations or sales
People	Traditional marketers	Adding analytical & technical folks to the team	Adding process folks to the team that can marry process and technology	Adding revenue marketers to the team	Adding customer czars to the team	Combining all with heavy analytics and insights
Process	Poor	Tech processes	Marketing processes	Revenue processes, mostly for new acquisition	Customer processes across the entire customer life cycle	All processes with a focus on revenue processes (precursor to revenue operations)
Tech	ad hoc	Build foundation	Marry marketing processes and technology	Marry tech and revenue processes, across sales and marketing	Marry tech and customer processes, across customer facing functions	Consolidated stack under one owner
		Do things well				
Data	ad hoc	Begin to use data in using tech	Begin using data for improving marketing processes and performance	Revenue decisions	Customer journey data	One view of data
			Begin to make data-driven decisions	Data-driven decision making	Actionable customer intelligence for sales and marketing	Actionable customer intelligence for all parts of the company
				Some actionable customer intelligence for sales and marketing		
Customer - Company Approach	Company is product focused	Company is product focused	Company is product focused	Company is product or customer focused	Company is customer focused	Company is customer focused
<i>Marketing Knowledge</i>	Marketing does not know the customer	Marketing does not know the customer	Marketing does not know the customer	Marketing beginning to know the customer, uses data to learn and improvise campaigns to drive revenue	Marketing knows the customer better than anyone, uses and provides actionable customer insights to all functions	Org knows the customer better than anyone, uses and provides actionable customer insights to all functions
Measures	Activity based	Operational	Operational	Revenue	Customer	All: operational, revenue and customer
		Bits and bytes	Process improvement	Demand generation	Customer journey	A growth engine

MARKETING OPERATIONS SKILLS CHART



INTERPRET AND DRIVE BUSINESS GOALS

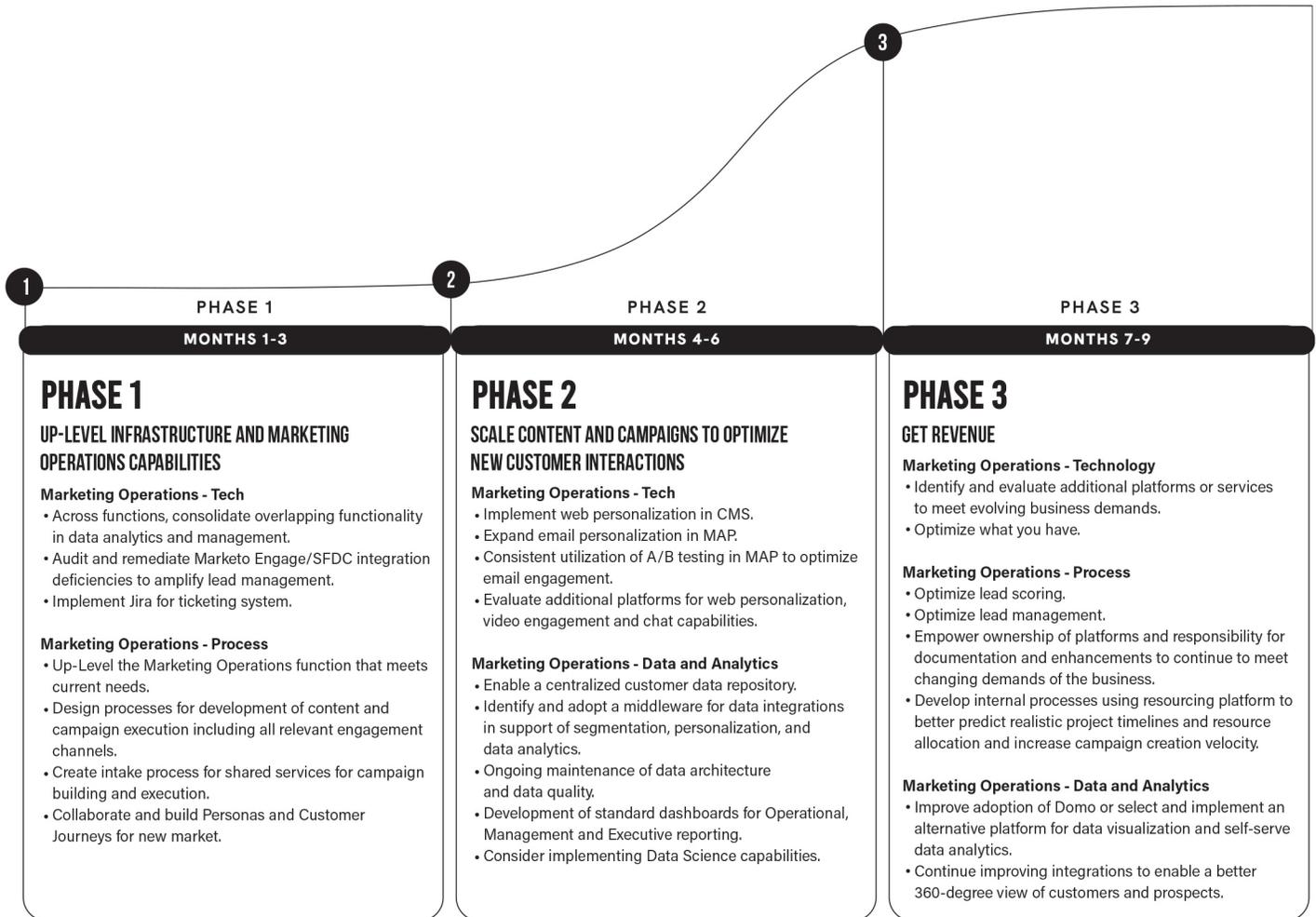
TECHNOLOGY, DATA & ANALYTICS			PROCESS ENGINEERING	PROJECT MANAGEMENT & TRAINING		CHANGE MANAGEMENT & CUSTOMER INSIGHTS
MarTech Stack	Data	Performance Management	Across Functions	Project Management & Budget	Training and Education	Across Functions
<ul style="list-style-type: none"> • Cross-Functional Strategy • Cross-Functional Road map • Vision • Interpreter • Selection • Integration • Optimization • Manage Infrastructure • Admin • Vendor Management • Scanning 	<ul style="list-style-type: none"> • Cross-Functional Strategy • Cross-Functional Road map • Strategy • Governance • Insights • Quality • Cleanliness • Optimization • DB Management • Data Management • Predictive • Warehouse • BI 	<ul style="list-style-type: none"> • Reporting • Analytics • Insights • Metrics & KPIs • Dashboards • Funnel Management • Operational Insights • Customer Intelligence 	<ul style="list-style-type: none"> • Funnel Management • Lead Management • Lead Life Cycle • Lead Conversion • Customer Buyer Journey • Personas • Campaign Operations • Segmentation • Content Operations • Shared Services Ops • Ticketing System • Insights • Optimization • Consulting • Best Practices • Performance Management 	<ul style="list-style-type: none"> • Professional Project Management • Budget & Budget Tracking • Financial Compliance 	<ul style="list-style-type: none"> • Training on New Systems • Training on New Processes • Training on Marketing Operations Skills • Marketing Enablement in Tech and Data 	<ul style="list-style-type: none"> • Change Agent • Visionary • Strategy to Action • Collaboration, Communication & Influence with Key Stakeholders • Empower Accountability • Dive innovation • Create Actionable Customer Insights for All Key Stakeholders

COMMUNICATION CHARACTERISTICS FOR XYZ COMPANY PLAN



Communication Characteristics	Description of the Communication Characteristics	Action	Due Date
Intent	Every communication has a specific intent or purpose – Inform, Educate, Influence, Request or Collaborate. Inform – to give facts or information. Educate – to give facts or information relevant to a job. Influence – to indirectly effect behavior or action. Request – to directly effect behavior or action. Collaborate – work jointly on an activity, especially to produce or create something.	Inform, Educate, Influence, Collaborate	11/1
Theme & Topics	Every communication has a specific theme communicated through a series of topic types. The topics might include Updates, Milestones Achieved, Best Practices Learned, Success Stories, Client Experiences, Anecdotes and Metrics.	Theme: COE Topic Types: Updates, Milestones, BP, Success Stories, Metrics	11/1
Cadence	Planned	TBD	11/1
Source	For an effective change management communication plan, communications may come from different sources and different voices.	Execs + Selected Peer Champions	11/1
Target Audience	Creating the right message, at the right time for the right person is the mantra of a successful communication plan. Each target audience represents a persona. The target audience for this comms plan includes the entire marketing organization at XYZ Company.	More specifically, Global Campaigns, MarComm, BU Marketing, Marketing Operations, Field Marketing & Agencies.	11/1
Flow	Bi-Directional means that when a communication is sent to a Persona, they can communicate back.	Open to Q&A in Teams & in meetings	11/1
Channels	Channels represent the different channels for the communication flow including digital channels	Teams, Team meetings, CMO meetings and comms, Video, ROADSHOW	11/1
Content Type	Content type refers to the format of the content. It might be email copy, a short video, a PPT, a report, etc.	Email, PPT, Teamschats, Video and COE Playbook	11/1
Call To Action	Every communication needs a specific call to action (CTA).	TBD for each comms element	11/1
Measurement	Level of Engagement (Opens, Click-thrus, Downloads, Return, Visits, % of Population Engaged, % of Functions Engaged, # of comms from Champions or Change Agents, etc.	Depends on views in Team and COE site	11/1
Resources Required	Comms Leader	Ian to participate in all channels	11/1

SAMPLE MARTECH ROADMAP



SAMPLE



Overall Strategy:

Long-Term Strategic Objectives	1-Year Goals	Measures	
Strategy			
Increase rate of digital transformation	1	Digitize current business model by digitizing one existing process in sales, marketing, service and operations	Digitize current process
	2	Add 2 new revenue sources generated from new digital business models.	Revenue Sources
People			
Increase morale and skill level of the marketing ops team	1	Reduce voluntary turnover among marketing team by 10% by the end of the year	% Voluntary Turnover
	2	Increase digital skills capability of employees with one additional certification per employee by end of year	# digital certifications
Process			
Achieve campaign execution excellence through process improvement	1	Reduce campaign cycle time from 4 weeks to 1 week by December.	# of days to build and execute a campaign
	2	Reduce the number of campaign errors from 5% to 2%	# of reported errors per campaign
Customer			
Deliver a consistent customer experience	1	Increase net new logos by 20% by end of fiscal year	# New Logos
	2	Increase Net Promoter Score by 15% by end of fiscal year	NPS
Technology			
Implement a customer-focused architecture that will scale	1	Reduce Unit Cost per Customer by 5% by end of fiscal year	Unit Cost Per Customer
	2	Increase CAPEX spend by 10% by end of fiscal year	CAPEX
Results			
Increase Return on Marketing Investment	1	Increase marketing sourced revenue by 13%	Marketing Sourced Revenue
	2	Reduce marketing program budget by 5%	Marketing Program Budget