



10 STEPS

TO GLOBAL MARKETING EFFICIENCY AT SCALE



WHAT'S NEEDED IN A WAY TO:

- Build an efficient production 'factory' that will handle day-to-day marketing execution globally and to enable field marketing to execute standardized campaigns quickly at low cost whilst balancing the need to localize and provide enough flexibility to drive local innovation.
- Provide continual training and coaching for the field so they can experience the 'art of the possible' when it comes to marketing's evolution.
- Empower a marketing operations function to gain actionable insights from the 'factory', maintain momentum along a strategic roadmap, drive innovation and use the right martech to help meet strategic objectives.

YOU CAN GET ONTO THE RIGHT PATH BY FOLLOWING 10 STEPS.

Think of these as a flexible framework that balances global messaging with local nuance, attention-to-detail and delivery on a massive scale.

A man and a woman are in a meeting. The man is standing and writing on a whiteboard with a marker. The woman is sitting and looking at the whiteboard. The whiteboard has some diagrams and text on it, including the word "PROJECT" and a list of items. The background is a blue-tinted image of the meeting.

01.

ALIGN CORPORATE, FIELD AND PRODUCT MARKETING

TO MAXIMIZE GAINS FROM MARKETING
TECHNOLOGY INVESTMENTS & ACTIVITIES



With the correct alignment, you can:

- Share goals that are measurable and ensure all functional and team plans are linked, with individuals understanding how their roles contribute to the wider objectives.
- Create an Aligned Accountability Framework* that combines business objectives and milestones, points of progress to reach goals and defines activities and output to reach them.
- Establish a set of share metrics to track against key milestones.

*SiriusDecisions



STEP ONE

The journey towards delivering marketing efficiency at scale starts with aligning the core teams that rely on its activity and output – corporate, field, product marketing and sales – with marketing operations overlaying everything.

It's well known that alignment between sales and marketing around lead management can drive huge benefits. You can enhance lead quality, accelerate deal cycles and enable sales within cycles, as both teams show their contribution to the business.



02.

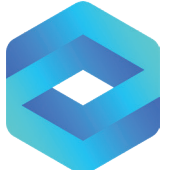
ALIGN MARKETING AND MARKETING OPERATIONS STRATEGY TACTICAL DEPLOYMENT

AND PROCESSES FOR GLOBAL
EFFECTIVENESS & EFFICIENCY



The marketing operations interlock for scalable delivery brings:

- **Alignment:** Cross-business alignment and strategy development
- **Agility:** Multiple (global) programme management
- **Process:** Standardization and governance
- **Assessment:** Excellence through continuous improvement
- **Accountability:** Strategic and tactical decision-making
- **Technology:** Superior technology know-how and control



STEP TWO

To deliver alignment at scale takes everything to another level with the core dependency interlocking marketing operations as the beating heart of orchestration, owning the technology, process and resources.

Marketing operations bridges the left/right brain divide and bring an enhanced level of effectiveness into your business by combining IT and marketing functions in one dedicated team. Bridging these two previously separate disciplines requires a cultural shift - silos must be broken down and all aspects of the business must be brought into play.

Marketing operations is the glue that inter-locks teams seeking programme delivery consistently at scale, globally.



03.

IMPROVE STRATEGIC AND TACTICAL DECISION MAKING

THROUGH SHARED INSIGHTS

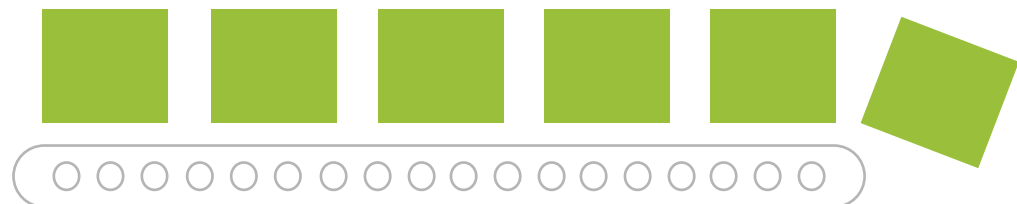


Delivery at scale requires a new set of metrics and reporting to ensure the flow and orchestration of delivery is agile and bottlenecks are reduced.

STEP THREE

Much like the manufacturing production line, the content/campaign factory needs to be measured on:

- Number of asset requests
- Average number of review cycles
- Average hours to completion
- Average time in each build stage
- Average production cost/time
- Percentage of requests completed
- Percentage of content localized
- Internal satisfaction measurement





04.

ENABLE AGILE GLOBAL PROGRAMME DELIVERY AND MANAGEMENT



“In order to increase output in any process...you must first relieve the constrained operations, or bottlenecks, that slow things down.”

* Eloqua - The Power of “Factory Thinking” in Sales and Marketing

STEP FOUR

As with process standardization, ensuring production and marketing teams are aligned on a clear set of service level agreements, a content amends policy as well as clear guidelines on how requests, approvals and activity scheduling manifest, should enable programmes to be executed on time in-line with expectations.

Furthermore, policies and procedures are in place to iron-out bottlenecks and disruption.

The background of the slide is a blurred industrial scene, possibly a factory floor or a large machine, with a strong blue color cast. The lighting is dramatic, with highlights and shadows that suggest a complex mechanical environment.

05.

IMPROVE PROGRAMME PRODUCTION QUALITY, EFFECTIVENESS AND EFFICIENCY

INDUSTRIALIZE DEMAND OPERATIONS
WHERE POSSIBLE



STEP FIVE

The Theory of Constraints suggests that to achieve marketing delivery at scale, raw materials (all the components required to deliver campaigns) need to filter through a production process with ease, at the maximum flow rate. They need to be standardized wherever possible (templated or using previously produced inventory) and be converted into a product at the most cost-effective operating cost.

Comparisons with factory production can be applied to the marketing world.



Lean Thinking

Lean thinking is only applicable once a deep understanding of the production process is known – how long it should take to produce individual assets, flows, reports and the like. Lean thinking then allows production to be scaled according to production volumes – tuned up

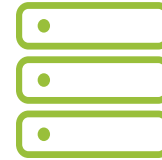
in times of high demand and scaled down during seasonal dips.

Lean thinking is informed by a different set of reporting metrics, such as the number of asset requests, average number of review cycles, average number of hours to completion, average time in build stage and stakeholder satisfaction.



Offshore outsourcing

Utilizing specialized resources to complete the lower-end, factory-type production work from regional global hubs, allows marketing operations professionals to access highly skilled platform technicians at potentially a fraction of the cost the same resources might be domestically. This also frees-up internal resources to focus on the more complex, premium production tasks.



Process standardization

Throughout production, there are many independent processes converging to produce an end product. For marketing this could be an email campaign, a data upload process, an event programme, an advert, a web experience and the like. If you are able to standardize the production type (asset, journey), standardize the request process to order products and standardize the approval process, then far quicker production times can be achieved. You obviously don't want to stifle innovation or creativity, however, in most cases, campaign production follows very similar formats. Keep bespoke requirements reserved only for premium requirements.



Reducing waste and re-purposing

This tends to be a big area of potential gain especially for large global enterprises operating very locally. Whilst providing a region flavor to messaging and communication type is encouraged, auditing regional marketing investment always shows huge wastes in marketing effort and budget. By encouraging regional teams to work in a standardized production process (where templates covering digital asset design, workflows, forms, web experiences, lead management processes are used extensively), not only can production costs be slashed, but production times too.



Automation wherever possible

There are many elements of production that can be automated and this tends to sit with the leaders of marketing operations, as the custodians of technology and production resources. Technology such as marketing automation platforms, project management and workflow tools can combine with the right integration to facilitate automation. Other applications such as [Demand.Center](#) have been designed to facilitate and control the whole process, aligning requesters with production and approval teams.



06.

**BRING STRUCTURE,
DISCIPLINE AND RIGOR**
TO DEMAND OPERATIONS



Key areas to consider:

- Templated build
- Campaign requests
- Testing & approvals
- Production SLAs
- Amends policy
- Asset inventory

STEP SIX

Understanding, implementing, measuring and continually improving processes through routine evaluation and refinement is where a marketing operations function is crucial in driving efficiency.

Process definition and refinement should be based around alignment to top level efficiency goals and aligned with individual processes for various business functions. For example, the campaign build request process between field and the production unit.



07.

ENCOURAGE CONTINUOUS IMPROVEMENT

ACROSS YOUR ORGANIZATION



As a guide, consider the following:

- What's our baseline performance – our KPIs?
- How do we compare with other competitors or industry peers?
- How can we take small steps to improve and monitor this?
- How do we document what we do and provide feedback?
- How can we empower and motivate employees?



STEP SEVEN

A culture of continuous improvement easily splits the performers from the laggards.

Continuous improvement is based on the concept that we're doing something right but we're never satisfied with the outcome and could do better. Just like in sports, team or individual. How can we tweak the settings on an F1 car to suit the track, weather conditions to get a better lap time? How can a swimmer adjust his stroke or breathing pattern to go faster?

Within marketing, marketing operations and sales it's the same. We're not short of data and a continuous flow of information, it's making sense of the data, and setting suitable KPIs to work towards, refine and improve.



08.

**BE A CENTER FOR
INNOVATION AND
BEST PRACTICE**



STEP EIGHT

CRITICAL COMPONENTS FOR A SHARED MARKETING SERVICE CENTER

- Align Corporate, Field & Product Marketing to maximize gains from marketing tech investments & activities.
- Align Marketing & Marketing Ops strategy, tactical deployment & processes for global effectiveness & efficiency.
- Improve strategic & tactical decision making through shared insights.



- Enable agile global programme delivery & management.
- Improve programme production quality, effectiveness & efficiency - industrialize demand operations where possible.
- Bring structure, discipline & rigor to demand operations.
- Encourage continuous improvement.



09.

ENSURE MARKETING ALIGNMENT WITH SALES



A unified alignment on processes, demand volumes and opportunity quality, orchestrated using specialized skills consistently and predictably, can help to industrialize demand.

STEP NINE

Whilst many of the emerging strategies associated with efficiency gains reside with marketing, let's not forget our end customer, sales.

Disjointed activities that fail to deliver value will certainly negatively impact revenue generation and create unhappy sales people.

With B2B marketing it's important that marketers can not only deliver programmes globally at scale, but also to spot potential impediments and opportunities that could influence demand generation. Breaking bottlenecks, eliminating waste and strategically allocating resources will all contribute to faster lead delivery to sales.



10.

TAME THE TECHNOLOGY



“31% of marketers say they have all the tools they need but don’t fully utilize what they have.”

* Ascend2 Marketing Tech Survey 2017

STEP TEN

Don’t get blind-sided by the shiny new technology you’ve read about or is being thrust upon you by your main vendor suppliers. As stated previously, solutions vendors want you to buy the next best thing. However, look at your current martech stack and consider how much of the functionality you’re using and what’s left to exploit?

Compare your marketing strategy and tactical delivery requirements against what technology you currently have and spot the gaps.

Critical to delivering marketing production efficiency at scale are platforms covering marketing automation, CRM, content management, project or workflow management, an effective data management tool and of course a business intelligence or next-gen marketing attribution platform – ideally all integrated!

WHERE TO FIND EXPERTISE AND RESOURCES

CRMT Digital can help you with the strategy, execution and transformation of your marketing operations function to deliver efficiency at scale.

We work in partnership with global organizations at various stages of marketing maturity. Our experts combine 15 years of experience at the forefront of marketing and sales technology with strategic consulting knowledge to help drive your organization towards excellence.

**Get in touch today - we'll be glad to help.
Contact us at info@crmtdigital.com
or give us a call.**

UK: +44 (0) 118 436 2200

US: +1 415 590 4884

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