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The Core Competencies Of The

MARKETING OPERATIONS LEADER

The overnight transformation from marketing automation specialist to marketing operations architect

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Introduction

Over the last decade, the growth of B2B marketing teams that have adopted marketing automation platforms (MAPs) as a fundamental tool in their marketing stack has given rise to the marketing automation specialist. While they're not the ones writing the lead nurturing sequences or designing landing pages and lead forms, they're the behind-the-scenes operators who have mastered the setup, organization, and flow around marketing lead data.

But today, marketers are being tasked with and being held accountable to more than just attracting visitors and nurturing leads. According to a study by B2B Marketing and Marketo, nearly 70% of senior marketers say they feel pressure to demonstrate marketing's contribution to the bottom line. And that revenue responsibility flows down to the entire marketing team.

This evolution has created the rise of the marketing operations professional.

Furthermore, the marketing operations role has an opportunity to grow marketing's stake in the organization. Marketing operations professionals strive to provide the information that improves decision making, implement the best technologies, and govern the analytics process. In order to succeed, you need a clear framework for leading organizations from the marketing operations discipline. That's why we created this book.

The 4 Steps to Leadership Success in Marketing Operations

Establish the Martech Core	Expert knowledge building a strong foundation for marketing success.
Become the Martech Consultant	Expert evaluation skills applied to understanding and purchasing the right martech. In charge of building out a bespoke and highly valuable marketing system.
Use the Scientific Method to Guide Marketing	A team leader in gathering data, and using the best analytic techniques to help marketing teams reach goals.
Communicate Insights and Govern Analytics Process Across Organization	An organizational leader who delivers metrics and communicates customer insights to key stakeholders throughout the organization

Marketing operations is more than campaign management. It’s knowledge management and change management.

With this book you’ll develop the core competencies to succeed as a marketing operations leader: This includes building the technical knowledge for implementing and managing complex marketing technology stacks, and managing teams by defining the process of learning from data.

It all culminates in developing the information and knowledge to:

- Communicate effectively with a heavy focus on results
- Be the champion of change and the customer
- Build strong relationships with leadership team through the delivery of metrics and governance of analytic processes

In this ebook, we will walk you through the four competencies that marketing automation specialists must develop in order to become the marketing operations leader.

First, we will cover how to build the marketing and sales technology core — the fundamental technologies that all B2B organizations require.

From there, you must become the marketing technology expert, and consult on technology and data gaps. You must be able to evaluate additional technologies to determine whether they will add value. We will use a martech evaluation framework to explain this key process.

Next, using a scientific method framework, we will explain how marketing operations can help the marketing team use the tech stack to answer questions with data. Executing like a scientist is essential in today’s knowledge driven workplace.

And finally, the last competency area is enabling the entire organization to make better decisions.

By the end of this ebook, you will be equipped with the frameworks and knowledge you need to become the transformational lynchpin that your marketing organization needs to succeed in the future.

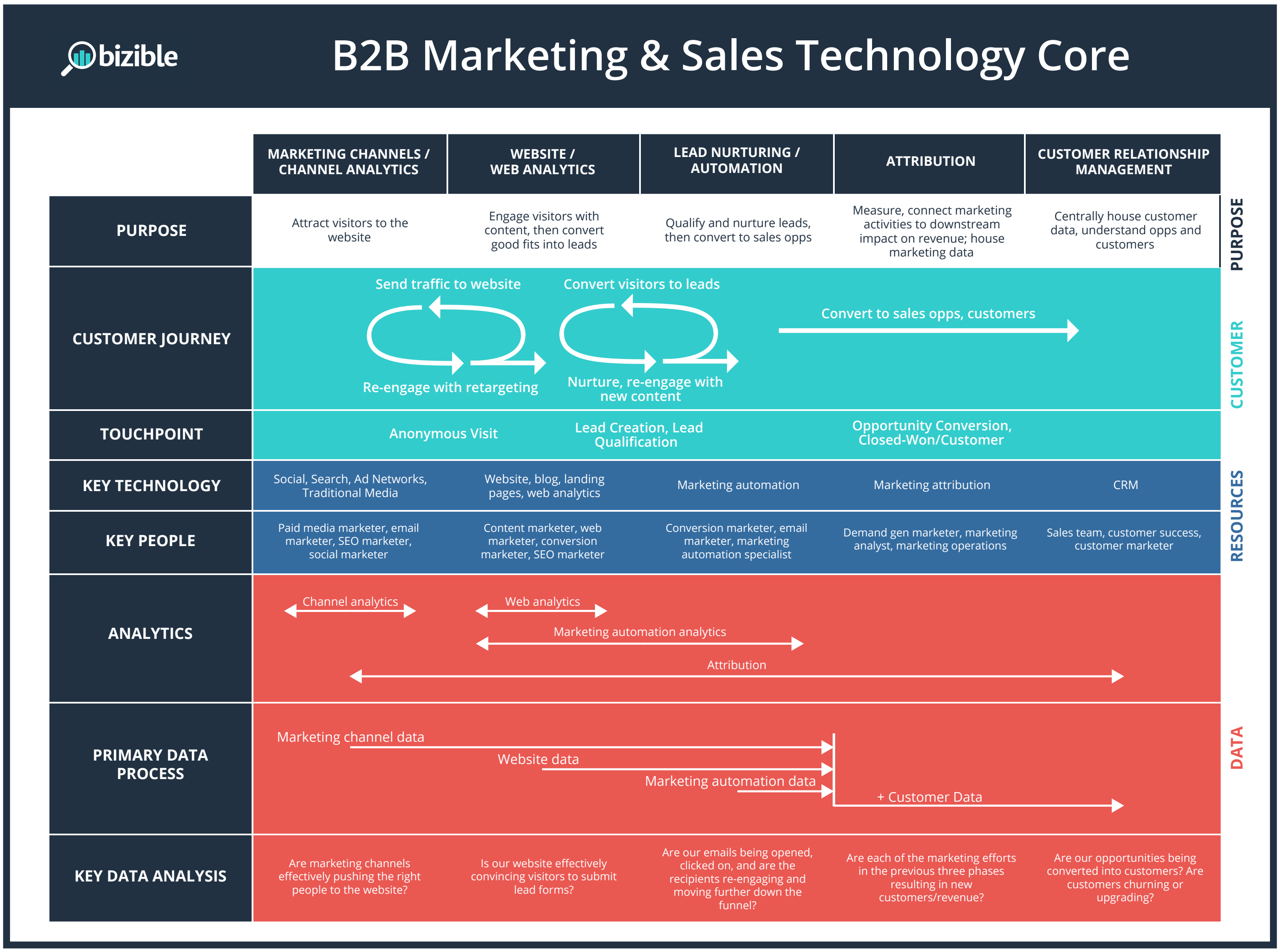
PART I:

Setting Up The Marketing & Sales Technology Core

If you are a marketing automation specialists, you are an expert when it comes to, you guessed it, the marketing automation platform. To become the architect — the go-to person — for marketing operations, however, a wider scope of expertise is needed. Marketing is tasked with taking on more data and more of the customer journey, and the marketing operations architect needs to be properly equipped to take it on.

First, this means that you must have a strong understanding of the entire marketing and sales technology core. The core includes marketing channels (and accompanying analytics), your website (and accompanying web analytics), lead nurturing/automation, attribution, and the CRM.

With that in mind, here is a framework to help you understand the marketing and sales technology core:



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These are the fundamental technologies that every B2B marketing organization requires at the most basic level. It's the foundational system that takes buyers down the funnel, from first-time visitor to customer, and the captures the data from the customer journey to ensure that the system is running smoothly.

Now we’re not saying that these are the only technologies that an organization needs — far from that — this is just the base which enables the marketing operations team to effectively evaluate additional technologies and build out the rest of the martech stack (which we’ll cover in Part 2).

MARKETING CHANNELS / CHANNEL ANALYTICS

Marketing channels are how companies generate awareness and attract people to their website. These include social channels like LinkedIn, Facebook, and Twitter; search channels (paid and organic) like Google and Bing; email; PPC/display networks like the Google Display Network; influencers; and more.

However, this entire marketing and sales technology core is not a one-way street. Marketers must use data from each of the technologies to make the others better. One example, as shown in the framework above is that data from web analytics can be used to improve marketing channel efficiency. This can happen a couple of ways: 1) by dropping a tracking cookie on website visitors and using that data to build retargeting lists for retargeting ad networks (e.g. AdRoll), and 2) using website visitor data to target your marketing channels by persona.

Data Process:
Many of these channels include proprietary data tracking and analytics for their respective channels. Generally, they track things like impressions, clicks, and if you choose to implement their conversion pixel on your website, they can track conversions (a specific user behavior on your website, typically a form fill).

Marketing channels will also, with a few exceptions, pass referral data to your website and ensuing analytics. Referral data includes what website the user was on before they came to your website, which allows marketers to know which channels are sending them web traffic and how much.

Key Question To Answer:
Are your marketing channels effectively pushing the right people to your website?

WEBSITE / WEB ANALYTICS

This part of the data core is pretty self-explanatory. It comprises your website, including all the content on your blog, landing pages, and downloads (e.g. ebooks and whitepapers). The information included in your website should be the draw, the offer, that you use in your marketing channels.

Websites are typically built in a content management system (CMS). This could be something like WordPress or built into a multi-solution system like Hubspot.

Data Process:
Web analytics tracks user behavior on your website. Starting with referral data, as mentioned previously, web analytics tracks where your visitors came from, what pages they interacted with, and for how long. Using this data, particularly the website conversion data, website marketers can see which pages and what offers are efficiently engaging and converting visitors and which aren't.

Key Question To Answer:
Is your website effectively engaging visitors?

Lead Nurturing / Automation

You're already the expert here. But to quickly summarize, this is the stage in the foundation where visitors become leads through filling out a form on a content offer or requesting a demo. It's the first time contact information is recorded and it is the stage in the process where email becomes increasingly powerful.

Data Process:
From a data perspective, marketing automation technologies are seen as a key marketing data warehouse because it is the first time specific lead data (name, email, company, etc.) is recorded. Combined with website data, marketers can put leads into the proper lead nurturing email sequence.

Key Question To Answer:
Is your website effectively converting visitors into leads? Then, are your emails being opened, clicked on, and are the recipients re-engaging and moving further down the funnel?

ATTRIBUTION

Attribution is the ultimate measurer and connector of the marketing and sales technology core. The primary function of attribution is to connect all marketing efforts to their downstream impact on revenue.

More than just connecting data, though, through attribution modeling, an attribution solution will determine each marketing channel's impact on revenue. And because the attribution is done through a centralized system, there's no double-counting of revenue credit. This allows marketers to calculate true ROI for every marketing effort at any level of granularity, from channel to campaign to keyword.

Data Process:
Through API integration and/or UTM parameters, the attribution solution connects all marketing data to sales data in the CRM, effectively turning sales data into marketing data.

Key Question To Answer:
Are each of your marketing efforts — marketing channels, website, and lead nurturing — resulting in new customers and revenue? How much revenue is each effort contributing to?

CUSTOMER RELATIONSHIP MANAGEMENT

The last piece of the marketing and sales technology core is the customer relationship management (CRM) solution. This is the primary data warehouse for the sales team and sales data. It's the go-to place for customer information, and helps the sales team understand opportunity and customer data.

Traditionally, the CRM was for the sales team only, but as more marketers are being held responsible for revenue, the CRM is increasingly becoming part of the marketing domain. This is possible through attribution.

Data Process:
While some information, like data in form submissions, is pushed to the CRM through platform integrations, much of the CRM data is inputted by the sales team. This includes account information, notes about particular accounts, potential revenue, and more.

Key Question To Answer:
Are your opportunities being converted into customers? Are customers churning or upgrading?

ACTION ITEM

Does your organization have each piece of the marketing and sales data core?

Marketing Channels: ______________________ ______________________
______________________ ______________________ ______________________

Website/Blog CMS: ______________________

Lead Nurturing / Automation: ______________________

Attribution: ______________________

CRM: ______________________

PART II:

Becoming The Marketing Technology Consultant And Expert

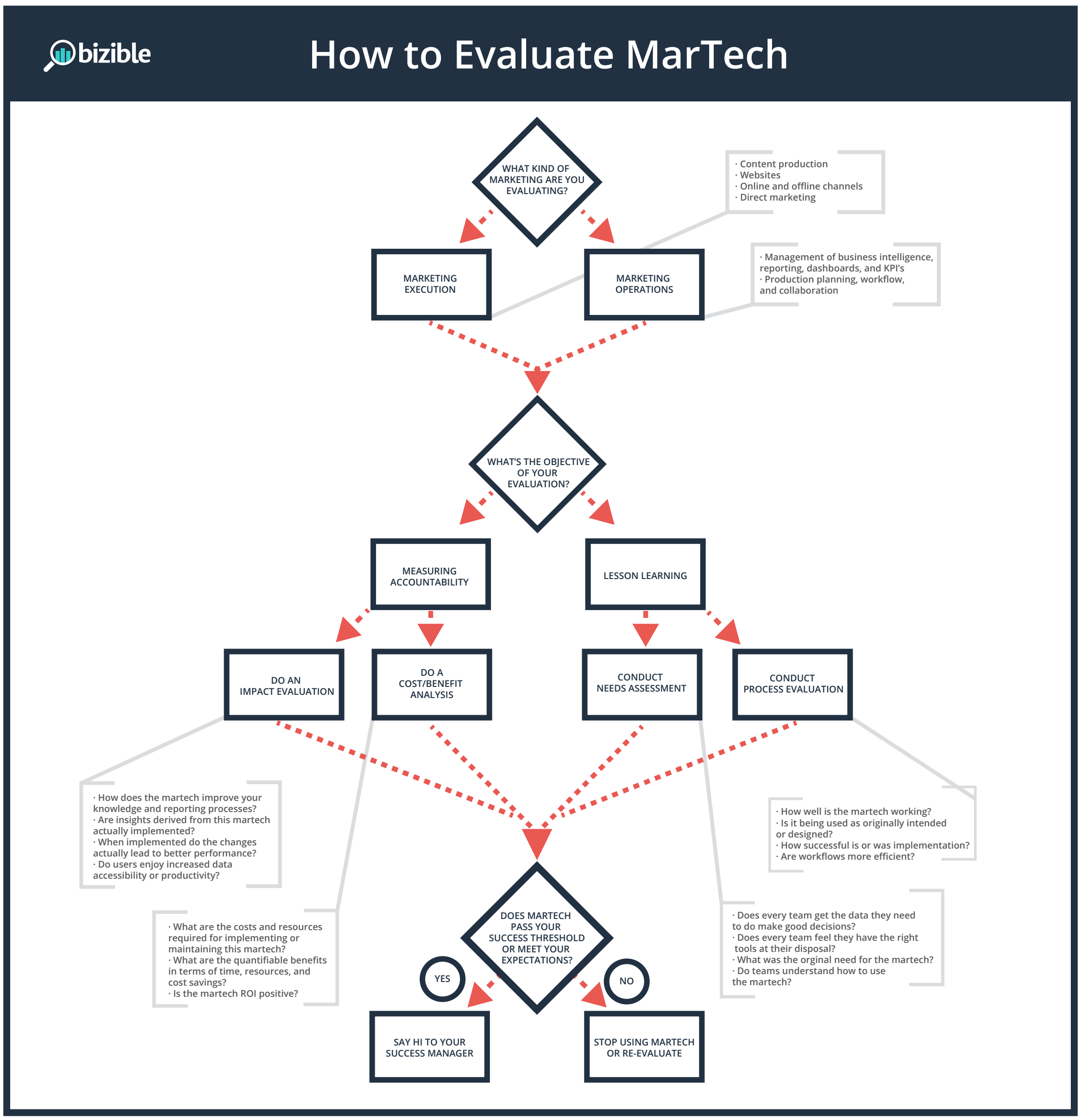
After establishing the core, it’s time to start thinking about the other technologies your team needs. Every organization has different competitive forces that it needs to address when it comes to running demand generation or account-based marketing strategies. So it’s essential that you as a marketing operations manager understand how to identify gaps and evaluate whether new marketing technology can fill those gaps.

You are technology consultant. Or, at least you need to become one in a marketing operations role.

In this section, we will cover the next step in our series on becoming a marketing operations leader. Every marketing operations manager can benefit from clear thinking around measuring the value of new tools.

When your role requires you to architect the right system for managing the sales and marketing funnel, you need to know whether every gear and cog is serving the right purpose and is functioning smoothly.

So let's discuss how to evaluate martech in your effort to build the perfect marketing machine.



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STEP 1: DEFINE THE PURPOSE OF YOUR EVALUATION

What do you care most about? Is it managing the funnel, understanding the customer, creating better content, optimizing paid media campaigns, or making sure team members have the access to the right metrics?

Whichever it is, you'll need to understand how well your current marketing technology is helping you achieve these goals. You'll also want a good way to understand whether you have a gap that requires new marketing technology to fill.

In the framework, we've broken down marketing technology into two categories: Marketing Execution and Marketing Operations.

Some call this front office and back office. Marketing execution refers to creation of marketing assets and the activities associated with filling the top of the funnel, as well as nurturing prospects to becoming a customer.

Marketing operations, on the other hand, refers to the analytic process and the management of workflows to improve marketing effectiveness and efficiency.

After identifying the marketing tool or solution you need to evaluate, it's time to narrow down the purpose of your evaluation.

STEP 2: DECIDE WHETHER THE GOAL IS LESSON LEARNING OR ACCOUNTABILITY

When doing research, it's often good to first understand the lay of the land. How are people using the technology? What's the current process for production? How do we know a need exists that requires investment in technology?

This step is called lesson learning. Your goal here is to observe and try to understand. This is great when you're at a new organization or becoming familiar with how a team operates.

On the other end of the spectrum is the goal of holding a team or technology accountable. With this goal you want to be able to measure performance in a quantitative fashion. You want to compare two teams or technologies using a method that gives comparable results. In other words, you are comparing apples to apples and finding the best one.

Once you have chosen whether you care about lesson learning or accountability for this particular evaluation, it's time to choose the best method.

STEP 3: CHOOSE THE BEST EVALUATION METHOD

Evaluating marketing technology is like when a teacher grades a homework assignment. There should be a threshold for passing and a clear way to tell the difference between an A grade and a C grade.

This part is up to you. You can choose more quantitative or qualitative evaluation methods, but either way you should be clear in your thinking on what you consider passing or failing.

It's now time to grade your martech.

Choosing the best method is more of an art. But the foundation of any skill is good common sense and common sense goes a long way in choosing a good evaluation method.

For example, if you care that a certain tool is saving your team time, then you'd choose a more quantitative evaluation method like a cost/benefit analysis. You'd attach a dollar amount to the time saved (the benefit) and compare whether it's more than the cost of the tool. If it's ROI positive, then you know that the tool does as it is supposed to: save you time and money.

Other evaluations of marketing technology may not lend itself perfectly to a strictly quantitative method. A great example of this is marketing analytics tools. They help you understand the customer or understand how different campaigns perform, so you can replicate what's working and address what's not working.

These tools lend themselves well to looking at the impact of the tool. What does it enable you to do? What would happen if the tool were to suddenly disappear — would it have a major or minor impact? Choosing to do an impact analysis is ideal in this situation.

Whichever you choose, you are sure to gain a better understanding of the value of the tool. By thinking critically about the purpose and impact of the marketing technology, you'll become an expert technology consultant.

In today's technology driven marketing teams, the technology expert is an essential source of guidance.

STEP 4: MAKE A DECISION

After completing your evaluation you should either have a score or have made a decision on whether the martech gets a passing or failing grade.

If it passed your test, then it clearly has a lot of value and you should keep using it. If it failed, then it's time to reconsider whether it has a place in your technology stack. At this point you should consider re-evaluating, asking questions that you didn't ask before, or simply stop using the tool.

ACTION ITEM

List the technologies that have weak connection to your marketing objectives. What would convince you that they are necessary and vital?

PART III:

Executing Like A Scientist

Once the marketing operations architect has established the technology core and has evaluated and incorporated other pieces of martech to fill out the stack, the next role is to help the marketing team use the tools to answer questions using data.

But as the number of marketing tools has greatly expanded, it's easy for marketing teams to become overwhelmed. There's so much technology, so many methods, so much data, and so many opinions. The marketing operations role has been tasked with evaluating, selecting, integrating and synthesizing these operations solutions into a functional marketing machine.

In this section, we will explain an interative framework to help marketing operations specialists optimize that process, so that it yields better solutions in less time. Once that core system of martech solutions is in place, there are numerous iterations to be made and critical, actionable questions to answer.

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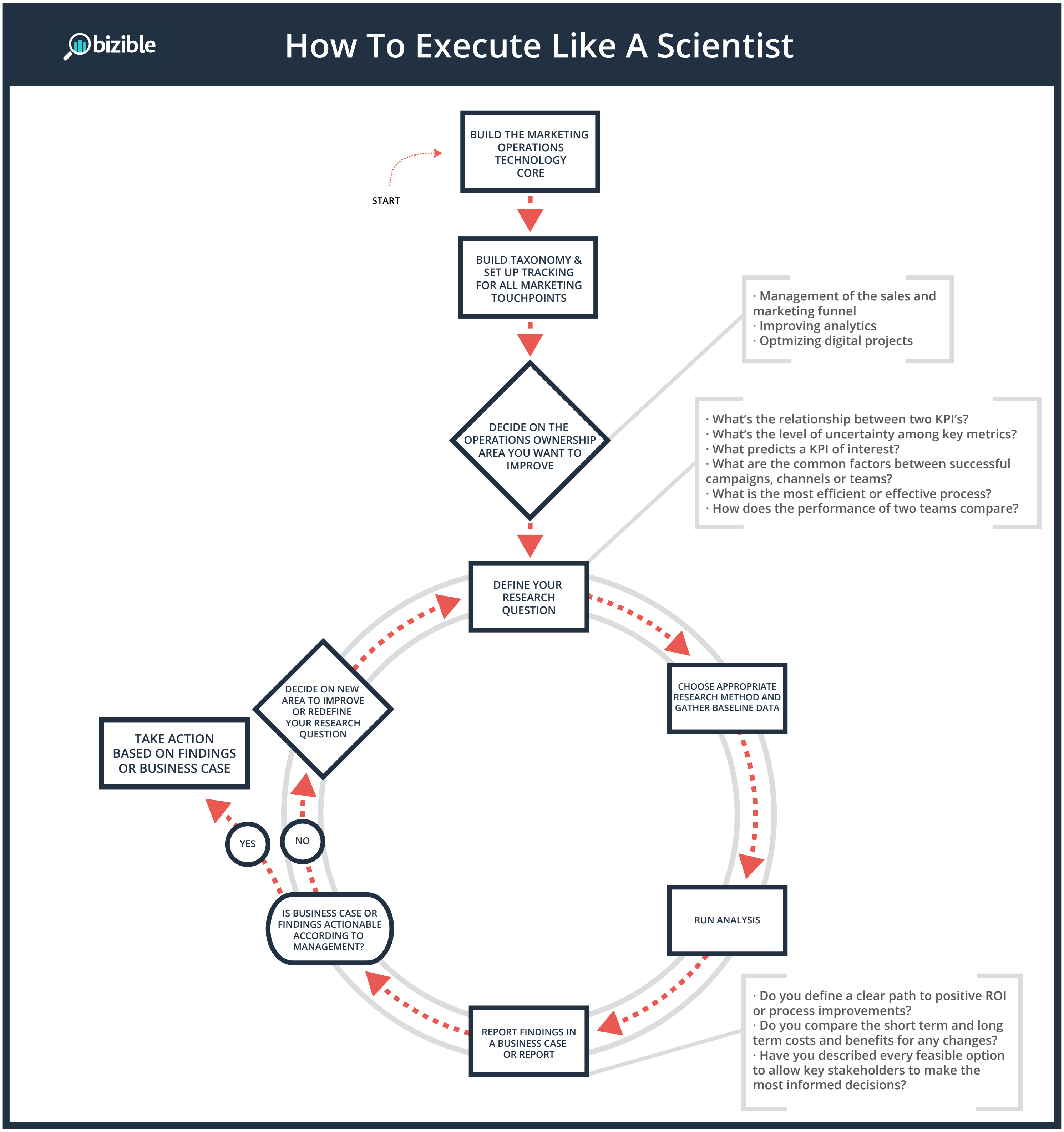
Using the time-tested scientific method to evaluate data and conduct usability tests is one way to confidently make these iterations. These iterations are geared toward finding ways that martech can yield more qualified leads, speed up pipeline velocity, and generate more deals — results that every Manager, Director, or Chief Officer care about. The scientific method identifies, analyzes, tests, and presents answers to research questions using the systematic, scientific method.

The process looks like this:



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STEP 1: IDENTIFY THE RESEARCH QUESTION

Identifying the proper research question is the first step of this process. For a marketing operations specialist, a classic research questions would be, "How can we improve our data gathering abilities?" or, "What tech capabilities does our team need to better optimize their campaigns?"

A good research question should have at least one of these qualities:

- The question should be actionable (help the team do something)
- The question should help make a necessary strategy decision (identify a need for new tech capabilities, integrations, tracking solutions, etc.)
- The answer to the question could be supplemental in answering an actionable question (analyze current data set to determine the company's readiness for a new martech capability)

STEP 2: GATHER DATA

The second step is to gather the right type of data that will support the expected hypothesis of the research question. This data can be gathered from a variety of sources.

However, it's important to note that many sources sources may contain "siloed" data. Data collected from these sources may only cover variables relevant to the specific function of the martech solution from which it originated. Therefore, the data may not comprehensively represent all the variables necessary to conclusively answering the research question — important, correlative data could be missing.

SOURCES OF DATA:

- Marketing attribution (comprehensive)
- Marketing automation (siloed)
- Website analytics (siloed)
- Ad network analytics (siloed)
- ABM platforms (siloed)

In order for the data and analysis to be indicative of actionable change, several characteristics should be represented in the data set:

ACCURATE — the data must be factually and structurally accurate in order for the analysis to yield actionable changes.

SIGNIFICANT — there must be enough data to reliably support actionable strategy inferences.

TRANSCENDS VARIABLES — there cannot be any outlying details that would influence the result of the analysis that were not included in the data set.

INFORMS A STRATEGY — the result of the data should inform a specific strategy or set of marketing activities, rather than only being a list of accurate, significant, comprehensive data.

STEP 3: RUN ANALYSIS

The next step is for the marketing operations professional to run their analysis. This "analysis" can take several different forms. The three most common types of analysis for a marketing operations role are exploratory, inferential, and predictive analyses.

EXPLORATORY — Exploratory analysis is likely one of the most beneficial types of analysis for a marketing operations professional. For instance, they can determine the types of new tech they need by considering holes in their data gathering processes, or a need for integrations between different pieces of martech.

INFERENTIAL — Inferential analysis begins with a set of data, and it makes inferences about the state of things based on the implications of the data set. Usually, data pivots are used in this type of analysis, where certain variables within a data set are compared against each other in order to make specific inferences.

PREDICTIVE — This type of analysis is similar to inferential analysis, but instead of being centered on the here and now, it makes predictions about the future. Current and historical data can be used to identify trends, anticipate consumer behaviors, and create a framework of predictions that marketers can use to make decisions. For instance, predictive analysis can anticipate the types of martech an expanding company will need in the future based on touchpoint volume, company budget, and other contributing factors.

STEP 4: IS THE RESULT ACTIONABLE?

After the analysis is complete, the next step is to consider the results. In order for a data analysis to affirmatively answer the research question, the result must be actionable. An actionable result is determined by how well it answers the following questions:

ACTIONABLE QUESTIONS:

- Is the result overwhelmingly tipped in one direction?
- Do all of the variables tend toward one answer?
- Do all (or most) isolated pivots affirm the result?

If the result of your analysis doesn't conclusively answer the research question, that's okay. It's better to be honest about the data than to force it to support conclusions that it just doesn't support. However, it might be possible to reevaluate the research question or find new data gathering sources. Either initiative could yield a more conclusive result.

In either case, you're now in phase five.

STEP 5: PRESENT RECOMMENDATIONS (OR REEVALUATE)

If the answer to phase three yields an actionable result, then it's time to present the findings and recommend a course of action. Because the marketing operations specialist used this strategic framework for evaluating their decision recommendation, they'll be equipped to answer questions and defend their suggested plan.

If, however, the evaluation in phase three revealed issues with the data or analysis process, it is probably time to reevaluate the approach. For instance, if the question itself didn't yield an actionable result, perhaps the question needs to be refined. Or, if the data gathered wasn't accurate, data hygiene might be a top priority.

Or, if the data gather wasn't significant or comprehensive, perhaps the marketing team's data gathering technologies need to be increased. In many cases, marketing operations professionals find that they're not able to collect the data they need from siloed pieces of martech, and instead need a comprehensive attribution solution in order to systematically track the prospect and customer data throughout the entire funnel.

ACTION ITEM

Choose a functional area of marketing closest to you. Think about the current data analysis process used to inform decision making. What are the questions you could answer through applying the scientific method?

PART IV:

Empowering Your Entire Team

As the marketing operations function continues to grow in influence, the potential business impact is not limited to just the marketing department (Parts I, II, and III). With the right tools, the role can impact business decisions for the organization as a whole.

In this section, we'll cover three things marketing operations professionals needs to do to have the greatest impact at an organization: 1) communicating customer insights, 2) delivering the best metrics, and 3) helping the organization make better decisions through analytics.

Becoming a leader as a marketing operations professional requires more than the ability to analyze data. It requires understanding what information matters most to senior leadership and communicating it clearly.

The final competency area for marketing operations leadership is empowering the organization with the best analytics process.

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STEP 1: HELP THE ORGANIZATION UNDERSTAND THE CUSTOMER

A great customer experience is the result establishing a good marketing technology stack and helping teams understand funnel data. In other words, it's the results of the previous three steps covered in this book. Now, it's time to communicate what your team has learned from implementing and managing marketing technology.

Leadership cares about two very specific kinds of information: how marketing activities connect to revenue and what kinds of intelligents you've gained about the customer.

With the core marketing technologies in use you can run revenue reports that explain a variety of customer and revenue insights.

Reports to Run

1. Opportunity and Revenue Conversion By Content Topic and Type - This set of reports is focused on measuring content in terms of bottom of funnel conversions. In other words, which content did prospects who became an opportunity engage with? This is separate from content that prospects viewed who ended up closed-lost. This type of reporting helps you understand what your ideal customer cares about and what content convinces them to convert.

Leadership teams need know who the ideal customer is and communicating insights such as the content types and content topics tied to closed-won customers accomplishes this.

It's also the key to becoming a best in class content marketing organization. When you accomplish this, your brand and your content becomes a competitive advantage that makes it difficult for competitors to enter into your space.

2. Opportunities and Closed Won Customers By Channel - This set of reports is focused on helping you understand where your best customers come from.

This kind of customer intelligence helps organizations understand markets and the quality of channels in terms of customer generation. When you can understand and predict where customers from, you become the source of highly valuable information. You become the expert on the customer and where to find them.

3. Persona-Based Reporting For Targeted Media — If you're spending on targeted advertising, such as account-based retargeting or LinkedIn advertising then you have the ability to target potential customers along demographic and firmographic factors. When you connect this to opportunity and revenue data this builds a wealth of knowledge on industries and personas. For example, you can know which ad campaigns and content topics generate opportunities and revenue, thereby shedding light on what resonates most with your target audience and accounts.

Reports include opportunities or revenue by referral source and opportunities by ad campaigns that promote content.

With these reports you become the expert of the customer/persona. You also understand how to deliver the best in class content marketing experience by delivering industry leading information.

To learn more about how to run these reports inside your CRM, explore how Bizible's multi-touch attribution solution can connect top-of-the-funnel conversions to opportunities and revenue.

STEP 2: DELIVER THE BEST METRICS TO EVERY TEAM MEMBER

As a marketing operations manager delivering a great customer experience is only the beginnning. To keep the marketing on a continual cycle of success they need to have access to reliable metrics. There are two ingredients here.

Getting access is easier said than done. There are many forces at work here.

There are legacy systems, cost of marketing analytics software, current protocol, and current culture around data that marketing operations professionals often need to navigate.

Nonetheless, delivering the right metrics are important. As the saying goes, “you optimize for what you measure.” To do this, follow these steps:

- Understand the objectives and performance metrics that each different role is responsible for. You may have done this already as part of your needs assessment for investigating whether their is a need for new marketing technology.
- Understand whether performance is tied to metrics as far down the funnel as possible, e.g. opportunities and revenue.
- Gather feedback on whether team members feel like they have the best data to make decisions day to day and month to month.
- Gather feedback from leadership on whether they feel like marketing is accountabile to business value metrics. And whether they are satisfied with high level reporting coming from marketing.

STEP 3: ENABLE THE ENTIRE ORGANIZATION WITH BETTER ANALYTICS

Following these steps you’ll become the go-between for your organization and the knowledge and information that matters most.

As the person who understands the connection between marketing and business value the final step is being the enabler in the areas you discover opportunities resulting from the steps you’ve followed in this book.

This is certainly the most broad step because the answers and opportunities you find will be highly unique to your organization. Such is the nature of a marketing core competency: it’s the process unique to your organization that separates you from your competitors.

You may find access to new markets and audiences as a result of improvements to lead generation. Your management of the entire funnel may create insights on increasing the perceived benefit of your product or solution. All of these are difficult to replicate by your competitors if you can enable your organization to apply marketing operation insights to product development and marketing strategy.

Being the enabler requires that you focus on:

— Building relationships across teams and up the ladder
— Communicating effectively through good storytelling
— Focusing on results in your communications and presentations
— Being the champion of change and the customer

ACTION ITEM

Define the top three reports that help you understand the customer:

____

____

____

ACTION ITEM

Define the most important metrics for each of the following roles/teams:

CEO: ____

Director of Demand Generation: ________________________________

Paid Media Team: ________________________________

Email Team: ________________________________

Content Team: ________________________________

Events Team: ________________________________

Sales/Business Development Reps:________________________________

Final Thoughts

After mastering these four core competencies in marketing operations you are now ready to empower your organization.

Today’s marketing operations leadership skills are built on understanding the levers that control the marketing and sales funnel. When you can also communicate that knowledge and lead change with best in class marketing technology, you can become the architect that wields influence throughout the entire organization.

ABOUT BIZIBLE

Bizible is the leader in B2B marketing attribution with hundreds of customers including Optimizely, MongoDB, Xamarin and ADP. We provide a B2B marketing attribution solution dedicated to helping companies make profitable marketing decisions.

Our technology connects all marketing activity (both online and offline) to revenue, enabling revenue credit to be accurately distributed to the marketing channels that are making an impact. This advanced, multi-touch attribution technology allows marketers to do more effective and more efficient marketing.

To learn more, visit www.bizible.com.

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