



Creating a Strategy Roadmap for Marketing Operations By Laura Patterson, VisionEdge Marketing

Not long ago few B2B companies had a marketing operations function. Today, this function is becoming an important facet of the marketing organization. The marketing operations function enables the marketing function to operate more like a business, with formalized processes, infrastructure, and reporting. The bare essentials marketing operation function should perform at least three functions:

1. • Drive the processes for budgeting and investment decisions and more effective strategic planning.
2. • Lead the charge for marketing performance measurement processes.
3. • Identify and implement the required infrastructure to maintain the consistent implementation of processes.

As this function matures, it is critical to have a strategic roadmap. Nikki Tyrer of Accenture articulated this need when she said, "While vision is a key aspect of marketing strategy, the failure to create a roadmap to move from concept to implementation leaves strategy on the starting block." Marketing Operations is a critical driver of Marketing Performance Management. High performance marketing operations strategy roadmaps address the processes, data, resources, talent/skills, systems, and metrics needed to realize the strategy. A roadmap describes a future environment, objectives to be achieved within that environment, and plans for how those objectives will be achieved over time.

The purpose of a roadmap is to communicate the overall direction, priorities, and how the strategy will be executed. The operations strategy roadmap should be aligned with the specific objectives for the business, build on the organization's strengths, and provide a blueprint for future capabilities.

What are the basic components for the marketing operations roadmap? A marketing operations roadmap should address these areas:

- Technology, Systems, Tools. Technology, systems and tools serve as key enablers for creating performance-driven marketing organizations. The identification, implementation and deployment of these enablers are now in the domain of marketing operations.
- Work Force. Marketing operations is responsible for ensuring the marketing personnel are adequately trained, educated, and have the skills necessary to be accountable for their work.
- Processes / Process Improvement. This is one of the primary responsibilities of marketing operations. It is important that the key processes are defined, monitored, repeatable, routinely evaluated and refined.
- Performance Measures. Also one of the primary responsibilities of marketing operations, this section of the plan should identify the standards and the timeline for defining and deploying new metrics.

- Capital Allocation/Requirements. This section should identify the capital investments and the timing of the investments needed to execute the operations strategy.
- Supplier Management: Most marketing operations organization need to leverage the expertise of third parties. The types of suppliers that will be needed, the timing, and how these suppliers support the roadmap should be documented.

We have successfully deployed a strategy roadmap development process designed around three key steps: strategy, assessment, and blueprinting. This process is designed to develop a marketing operations roadmap that focuses on those areas that will have the maximum value and contribution to the business.

1. Strategy: A marketing operations roadmap needs to reflect both the company's and marketing organization's strategy. This initial step provides important context. A roadmap cannot be created with first understanding the vision and strategy, what the organization believes is the role of marketing and the role of marketing operations and planning in achieving the organization's business outcomes. Strategy development requires understanding the strategic priorities the company has set for marketing and how marketing operations is expected to help achieve organizational goals. The best way to understand this context if you don't have a strategy document is to ask key members of your leadership team.
2. Assessment: It is difficult to determine where you are going to go and how you are going to get there if you do not know where you are and the current capabilities, particularly in relation to the organization's strategy. Once you have the information from the first step, the next step is to assess the current marketing operations capabilities and performance and to compare this against other marketing operations practitioners. For this step you will want to review existing processes, data, metrics, analytics, plans and strategies and marketing operations best practices in preparation for the roadmap development.
3. Roadmap Document: Once the strategy is clarified and the assessment is completed, a specific action plan/road map can be developed to close gaps and leverage opportunities. One way to create the blueprint is to conduct a cross-function strategy session. The purpose of the session is to identify requirements and elements to create an executable plan focused on building operational capabilities.

Creating a strategy roadmap communicates that the marketing operations has evolved into a bona-fide force within the organization. A strategy roadmap enables marketing operations to go beyond metrics and dashboards to serving as a key player within the marketing function. The strategy roadmap enables marketing operations to manage marketing from an end-to-end perspective.