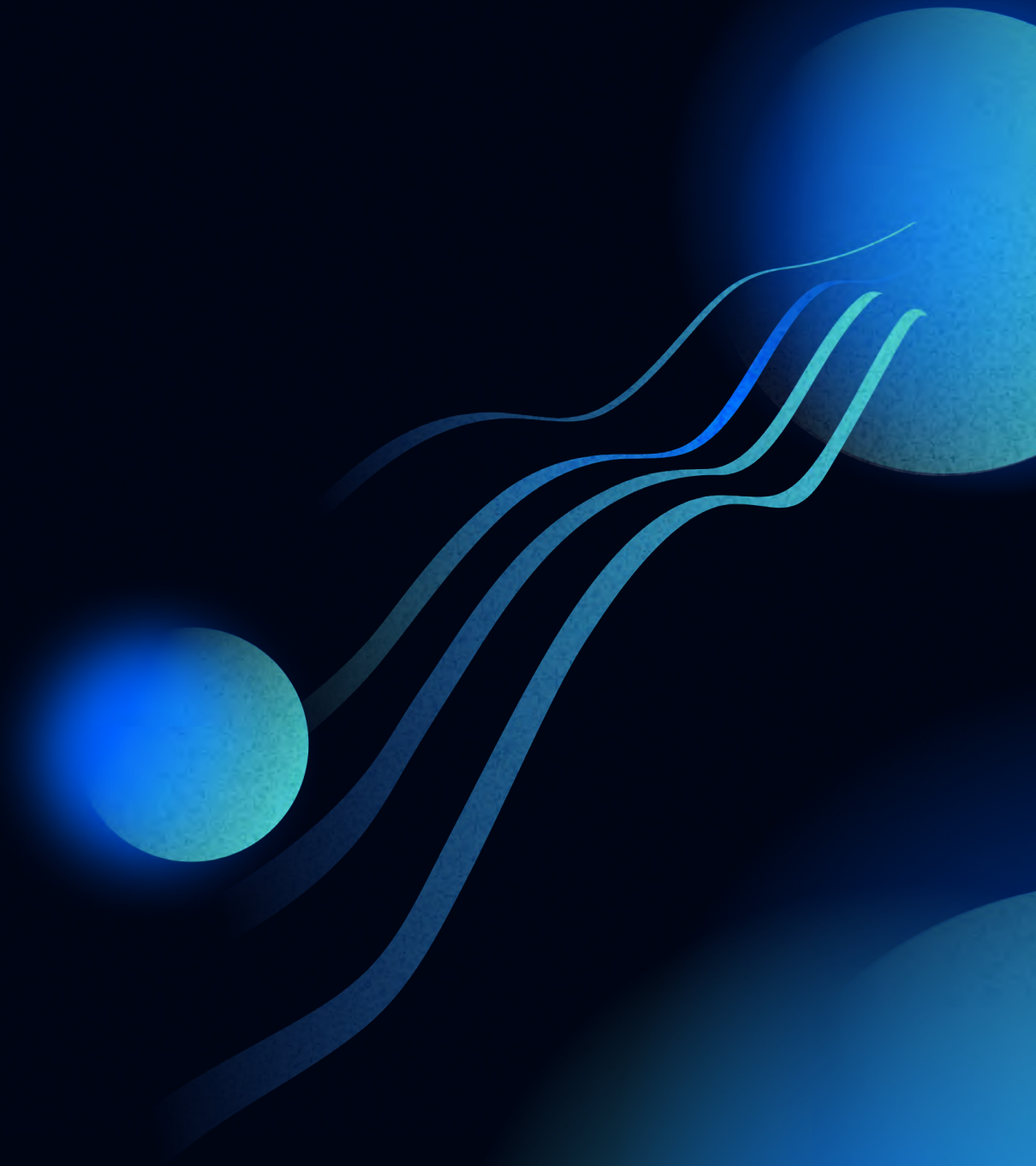


The Ultimate Marketing Operations Efficiency Checklist.





How to Improve Marketing Operations

As digital marketing becomes more complex, the role of marketing operations becomes much more critical.

The Gartner Marketing Operations Survey 2020 reports that “organizations with a dedicated marketing operations leader are more effective and better utilize their investments – including marketing technology – than those without.”

Marketing operations are even more necessary in fast-growing organizations. Hyper-growth companies often experience inefficiencies and disorganization, which lead to wasted time and resources.

In this eBook, we’ll show you how to create efficiencies in your tech stack, reporting, budget, and project management system that will improve the way your marketing department functions. Let’s get started.

Tech Stack Efficiency Checklist:

- Establish strong governance and a clear approval process
- Define and expand your buying committee
- Streamline and consolidate your tech stack
- Check for strong integrations and scalable automation

Tech Stack

As your company grows, you'll naturally find yourself adding more tools to your tech stack – but more isn't always better. Between acquisitions, mergers, and too many decision-makers at the table, you might end up with a myriad of tools you don't need.

The solution? **Establish strong governance and a clear approval process.** Centrally manage every tool that your marketing department uses and make executive decisions about their necessity. If people buy their own tech without running it by marketing ops, you could end up with a slew of tools that create silos, inefficiencies, and rising costs. A fragmented tech stack could also create legal liabilities, such as inaccurate reporting or failing to comply with regulations such as the EU's General Data Protection Regulation.

Another issue you might face is frequent turnover, making buying decisions and their aftermath difficult. For example, a marketing leader might buy a tool and then leave the company before it's implemented. For this reason, it's important to **define and expand your buying committee** to get buy-in from multiple stakeholders.

Next, **streamline and consolidate your tech stack.** Are you wasting money on multiple tools that do the same thing or sit forgotten? Are you paying for more seat licenses than your team is using? Figure out what your team needs, frequently reevaluate, and cut the waste.

“One of the biggest challenges marketers struggle with is getting their data to flow efficiently across their revenue systems,” says Arjun Pillai, senior vice president of products and growth at ZoomInfo.

If you're considering purchasing a new tool, check it for **strong integrations with your existing tech stack.** Remember that not every integration is created equal, so make sure to vet the quality of an integration before making a purchase. You should also ensure that the tools have **scalable automation** that will keep delivering value as your company grows. The goal here is longevity: you don't want to buy a new tech stack in a couple of years because you didn't account for growth.

Reporting Efficiency Checklist:

- Establish a reporting structure
- Build out a KPI framework
- Create a reporting schedule
- Automate your reports

Reporting

Your reporting and tech stack should go hand in hand. If your tech stack is disorganized, your reporting is probably inefficient. A marketing ops team may report directly to the CMO, so it's especially important to share the correct information in a digestible format.

“The biggest inefficiency in reporting is not operating from the same set of shared definitions with your sales, marketing, and finance counterparts,” says Mitchell Hanson, director of demand generation at ZoomInfo. If your team has shared definitions but they're pulling reports from different systems, you still don't have a single source of truth, and the margin of error increases.

To combat this confusion, **establish a reporting structure**. Pick one universal system for your sales and marketing teams to share information. Everybody should be looking at the same data set and have a clear understanding of what to report on.

Then **build out a KPI framework** for all marketing leaders on your team. Run it by the CMO to confirm what they want to see. While each marketing leader might look at a dozen or more metrics to manage their individual teams, they should have clarity on which KPIs the executives want to see. (Hint: it's probably only two or three).

You should also **create a reporting schedule**. Depending on your business, schedule daily, weekly, monthly, and quarterly roundups. Only invite stakeholders who absolutely need to be present to avoid wasting time. For example, at ZoomInfo, we have a Slack channel where marketing ops reports daily on the entire funnel. The team also reports weekly to the CRO and all sales and marketing leaders, and monthly to the C-suite.

Visibility, transparency, and consistency are key. “It's crucial to be consistent in your reporting,” Hanson says. “You'll lose credibility fast if you're not reporting on the same set of metrics every time. You can't just cherry-pick the highlights and downplay the misses.”

Finally, **automate your reports**. This makes distributing reports much easier and saves your team time manually collecting data.

Budget Efficiency Checklist:

- Have a clear budget number
- Attribute and track money
- Allocate based on shifting priorities
- Re-evaluate frequently
- Review your leads and budget together
- Meet with finance and accounting often
- Leave room for overspending

Budget

In hyper-growth companies, simply knowing what the budget is can be a challenge. You might be familiar with the phrase “tell us what you need.” While this flexibility has its advantages, not having a clear budget can lead to spending too little or (more likely) too much.

Each marketing department head should **have a clear budget number**. If you don’t already have one, consider hiring a budget manager to check in with each budget owner and monitor how they’re tracking toward their number. Make sure you also have a budget management tool that can specifically **attribute and track money**, such as the campaigns and events you’re running.

Then, **allocate based on shifting priorities**. How to distribute your budget will depend on what matters most to your business at the time. For example, you might choose to lean heavily (70 percent or more of your budget) into product marketing if you have a product launch coming up. In another month, you might lean more into content marketing or customer marketing.

The key is to **re-evaluate frequently**. “I review the media spend against our budget weekly,” says Deeksha Taneja, director of marketing operations and analytics at ZoomInfo.

“How you spend your budget should depend on where you are in the month and quarter, and how you’re pacing toward your targets. You want to time it so you’re hitting your revenue goals while maintaining efficiency.”

When reporting to the C-suite, **review your leads and budget together**. This will save time and make it easier to identify where to distribute your money.

For example, if you’re spending a lot of money on webinars but not garnering a lot of leads, you should probably re-allocate.

Meet with finance and accounting often (at ZoomInfo we meet bi-monthly) so they can forecast properly. Establish a strong relationship with the CFO and their team – trust us, it will benefit you greatly.

Lastly, **leave room for overspending**. You may want to make the strategic decision to tell your department heads they have less money than they actually have, just in case they overspend. This bucket of wiggle room or emergency money should sit with the CMO or VP of operations to make executive decisions and adjust accordingly.

Project Management Efficiency Checklist:

- Hire people who can work at the speed of your company
- Document everything and over-communicate
- Automate scalable work streams
- Train your team

Project Management

Project management can encompass everything from a blog post to an entire product launch. However, managing projects in a hyper-growth company is very different from a traditional environment.

Lots of moving parts can create silos, resulting in a lack of communication and duplicated work. This can cause huge problems, which is why it's important to **hire people who can work at the speed of your company**.

Make sure to **document everything and over-communicate**. Keep a record of their work to hold each team member accountable and reduce the risk of project delays. The key is to keep the documentation simple and concise. Nobody wants to read a lengthy document. The same goes for work streams – keep tasks and subtasks simple.

Additionally, **automate scalable work streams**. “Build templates with automation. Create reusable toolkits – especially for a hyper-distributed workforce. That’s where you get lots of efficiencies,” says Ian Harris, marketing program manager at ZoomInfo.

Most importantly, **train your team**. Every marketer should know how to manage their own projects, and every new team member should go through training on your tech stack and processes.

“Manage everyone to become a project manager,” Harris says. “Your PMO team can be smaller if every individual marketer knows what they’re doing.”

Lastly, don’t use unnecessary jargon and buzzwords. The simpler, the better.

“Manage everyone to become a project manager.”

Ian Harris

Marketing Program Manager, ZoomInfo



Work smarter, not harder

What if your marketing team could share one all-encompassing tool with sales? A platform that has best-in-class B2B data, automated workflows, strong integrations, and built-in reporting. Now they can.

Consolidate your tech stack, simplify your processes and see unprecedented ROI with [ZoomInfo's MarketingOS](#).