10 Urgent Questions for Marketing Operations, Answered

Real-World Strategies to Scale Your Marketing Operations
Your ability to “defend the spend” is the key to job security in a B2B marketing organization. But do you ever get tired of playing defense? Isn’t it better to be on offense—to not only justify the budget dollars you receive by highlighting the ROI you deliver—but also to inspire confidence in your company’s finance team and enthusiasm in its sales group? To be recognized as a driver of the business?

We sat down with Danny McKeever, Sr. Director, Marketing Operations and Technology at Integrate, to explore answers to the urgent questions marketing operations (MOPS) leaders are asking today. We also talked about the secret to MOPS success, and Danny shared great tips that can help you stop playing defense and go on offense instead. You can listen to the entire conversation here.

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Bonnie: In the last year how has MOPS changed with everything going digital?

Danny: The pandemic impacted us in a big way. It forced us to become more resourceful by taking a buyer-driven approach. We can no longer rely on the events channel to drive sales outcomes. The entire marketing team, including MOPS, had to scramble to figure out how to shift budget and strategies to continue to drive revenue.

The MOPS team pivoted quickly as the pandemic accelerated the need for an omnichannel approach across first- and third-parties. That was necessary to make digital channels more robust and capable of building journeys for buyers.

One major change we’ve experienced is an increase in the number of marketing touches. If you go back five years or so, the average number of touches was between eight and 10, and it gradually increased. Just before the...
pandemic, we were dealing with 12 to 18 different people in a decision-making unit, and now those touches are typically between 20 and 25. COVID has expedited engagement and pushed more people into these other channels.

So, that’s what I’ve been looking at recently, identifying tools and technologies where I can help speed up processes and focus on getting those key interactions across the journey while events are either digital or not happening at all.

**Bonnie:** How did you structure your MOPS team at Integrate and how do you approach your role and divide up the work?

**Danny:** That’s a great question. To structure the team at Integrate and divide up the work, I think of four big buckets that define how we organize MOPS:

1. Data
2. Process
3. Tools and technology
4. Reporting and analytics

We think about data from different perspectives, i.e., having the right data on contacts and accounts so we can understand who people are and where they are on their journey so we can deliver the right messaging. The other data component is what I think of as “response to revenue,” i.e., the data that allows us to interpret responses in terms of opportunities and value so we can defend marketing spend.
For the process component, we have a project management officer (PMO) who oversees how work gets done in the marketing organization, from planning through execution. She keeps everyone organized in a way that minimizes fire drills.

The tools and technology component includes digital. We oversee the entire technology stack, which includes the content management system and other solutions. Lastly, our reporting and analytics function focuses on enabling marketing to measure and show impact. These are the four buckets that make up MOPS at Integrate.

Bonnie: How do you defend the marketing spend at Integrate?

Danny: I focus on three key areas to justify spend:

1. Alignment with finance and sales on goals
2. Optimizing conversion rates at the campaign level and shifting budget accordingly
3. Enabling ROI reporting for paid spend

Marketing needs to be able to partner with the business from finance and sales for budgeting and planning through execution. Historically, one of marketing’s biggest challenges has been to define how much money is needed and what the return will be, from pipeline created to close. So, I start by getting in alignment with the finance and sales teams on that up front.

I ask specific questions about how much revenue marketing programs should generate, how much pipeline marketing is on the hook to create, etc., and then back that out of the funnel from the initial response and align goals across the organization. It’s the first step because without that, you can’t measure and keep yourself accountable for reaching goals. It’s critical to understand what drives sales outcomes.

The second step is to work with the marketing and leadership team to understand what’s working from a conversion rate perspective and adjust spend accordingly. Pipeline metrics are important here because we’re dealing with multiple buyers as I mentioned earlier, so we need to understand the influence of marketing touches. It’s not about assigning “credit” as much as
understanding impact to allocate the budget efficiently to enable sales.

Lastly, I calculate the ROI where we have direct spend so we know the cost per lead or marketing qualified lead and can determine the cost of customer acquisition. With this information, we can demonstrate that marketing is spending money wisely.

**Bonnie:** Can you describe your current technology stack?

**Danny:** Here’s a snapshot of the majority of the technology we use:
Not all of the digital solutions are pictured, like the content management system, but the green bar at the top represents the buyer journey. Below that, I loosely map out the technologies we use to get the right messages to the right people at the right time, no matter what channel they’re in. Pictured under that is the technology backbone — four key pieces of technology I always use that support everything else.

By using this approach and mapping technology to the buyer’s journey, marketers can understand where they have gaps in their technology stack and what they need to add. There are thousands of solutions out there, so this approach can help marketers avoid “shiny object syndrome” and identify real gaps.

The backbone consists of Integrate delivering the right people on the right accounts into the marketing automation system, which is Marketo. With Marketo, we run nurture programs and align intent data, engagement data and personas—the standard approach. Salesforce is my system of record that enables me to understand response to revenue.

We spend a lot of time getting the marketing data right because if our numbers don’t line up with sales numbers, marketing’s data is automatically discredited. There are two approaches you can take—either get your data right in Salesforce, or you can take everything out of Salesforce and put it into a third party system to try to stitch together marketing’s story. But it makes life so much easier when sales and marketing use the same reports and the numbers match up.

When there’s alignment, you don’t have to spend so much time defending marketing spend, which means you can go on offense, finding new ways to innovate and add value. If your data doesn’t align with sales, you’re inherently on the defensive. And that brings me to the fourth piece of our technology backbone: Full Circle Insights.

Full Circle is what helps me bridge the gap and tell the story of what’s working and what isn’t working. As users know, Salesforce has so many different objects, from the lead and contact and account opportunity to campaign and campaign member. When you build a report, the first thing Salesforce asks you is what objects you want to build the report from.

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Marketing needs a lot of objects for reporting—leads, contacts, accounts, opportunities, campaigns, campaign members, etc.—but you can’t build a report like that. You need a mechanism that aggregates your journey—that response to revenue across all these different objects—to a single object to tell the story. Full Circle makes that possible, and that’s why Full Circle has always been a critical piece of my technology backbone.

**Bonnie:** As the MOPS leader, how do you partner with Integrate’s sales team and the rest of the marketing team?

**Danny:** My team supports the marketing group from end to end, and we meet with the marketing group’s leader weekly to talk about what’s coming up. The PMO on my team helps the marketing leader’s team plan and execute campaigns. We align well, which is one of the benefits of the PMO and MOPS roles—the structure inherently forces alignment.

Secondly, we contribute by analyzing buyers—making sure we have the right accounts, the right people and the right data on hand. So, we’re prepared when the Integrate marketing team asks us to execute programs to reach people at a particular stage of the buyer journey—we have the ability to provide support and automate the process.

Clean data and team alignment between marketing and MOPS is critical. In addition to helping the marketing group defend the spend, we help them understand campaign-level performance—the ability to understand that response to revenue at the individual campaign level is critical. Marketing and MOPS co-present reporting and analytics back to the business on a monthly basis. A monthly meeting cadence works for Integrate because of the length of the sales cycle.

We also align with sales overall and support sales squads on specific functions. We help them target accounts, and we also partner with sales squads on strategies to target greenfield accounts in territories, identifying the 10% to 15% of accounts with current buying intent. With our help, sales can determine what they need to do next to follow up or adjust their strategy.

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Bonnie: Can you discuss in more detail how you align with the finance team at Integrate? For example, do you share marketing forecasts and models with them?

Danny: Aligning with finance is a very important step. Not only are you deriving marketing goals from that conversation, you are gaining alignment at the executive level across the organization. At every company I’ve worked with as a MOPS leader, one of my goals was to build a productive relationship with the CFO or someone on their team because collaboration with finance is essential for MOPS success.

You have to work cooperatively with both sales and finance to understand the revenue goals for the business and what the expectation for marketing is, down to details like new business vs. expansion and cross-selling and up-selling. When you understand what’s expected of marketing in terms of revenue, you can drill down to details like what percentage of revenue by product should come from the different teams. From there, you can back out the win rates and conversion rates across the funnel to get a ballpark understanding of where you need to be to hit targets.

We can report back to finance with conversion rates to let them know what we’re doing and what we’ve driven so far in terms of revenue. We can also let finance know where we’re spending our time now and, even more importantly, what we’re not doing anymore to make a business impact.

It’s critical to be on the same page on current activities and to keep expectations clear. With finance, that clarity usually comes in the form of models. Models rule the finance team’s world—they have models for everything—so we build a marketing and sales model, and from there, we derive the response to revenue goals across the funnel.

In a perfect world, I want revenue goals to come from either finance or sales operations. I prefer not to have marketing people set the goals for marketing. I want our objectives aligned with the business. Everyone gets a better outcome that way, in my experience.

Bonnie: What’s your cadence for meetings with your finance team, and how do you keep data aligned inside Salesforce?
Danny: At Integrate, we have a weekly meeting for sales operations, finance and MOPS, and it focuses expressly on data. We talk about data at every stage, including the top of the funnel, the middle of the funnel and pre-close data. Salesforce is our system of record for reporting, so any change made to Salesforce can potentially impact everyone else. That’s why it’s extremely helpful to get everyone in a room on a weekly basis so we can discuss the current data, talk through any challenges and collaborate on activities like updating or cleaning the data.

For example, if someone is making a push for EMEA accounts and wants to make a change to identify those contacts, the data meeting is an opportunity to ensure that any actions taken for that purpose don’t affect the functioning of technologies downstream that other groups use. Regular meetings help us prevent issues like that from occurring, and they are also a driver to maintain data integrity.

Bonnie: After you’ve established marketing’s goals with sales and finance, how do you make sure you’re on track for meeting those goals?

Danny: At Integrate, we have a simple dashboard in Salesforce that displays the status in relation to our response goals, e.g., marketing qualified goal, accepted lead goal, opportunity created goal, etc. We also look at the total amount and the pipeline value to goal. That’s all at the top of the dashboard.
Under that, we break it out around the next layer so we can look at things like how the different channels are performing from a conversion rate perspective. But the top of the dashboard gives us a sense of whether we are on track and what our pace is in relation to the goals. We’ve leveraged a lot of the dashboards Full Circle built and adjusted them to our business.

Bonnie: How do you improve conversion rates if you see them trending down?

Danny: We have a conversion rate committee made up of a sales operations person, several people from the Integrate marketing team and the manager of all of our sales development reps (SDRs) because performance varies across different programs, which may be at different stages. The committee helps us keep campaigns on track.

For example, the events channel is expensive. It has the potential to deliver great opportunities, but the cost is high, so it’s important to analyze the data and determine the steps on the journey leading up to the event and after the event. We’ll examine questions like are we getting the right people? Because if we have the right people in our database, the question is no longer how to get in front of the right people, it’s about how to get the conversion rates where they need to be.

To figure that out, you have to understand how to activate those people in those accounts by making sure you have content that resonates with them.

Understand what programs are driving the highest conversion rates.

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and by providing value. So the committee spends time understanding the various personas involved, what’s happening at the account level and what we can do to provide a meaningful experience on other channels and meet those people where they are.

On the other hand, if we identify a trend like a low inquiry to marketing qualified lead conversion rate, we’d look at if we’re driving content to the right people and examine ways to optimize spend to reach the right titles, around keywords, for instance.

Early stage pipeline is critical, but then it’s all about delivering the right experience and meeting people on channels they use. A potential customer might be engaging with us and also third-party channels that we’re not even aware of yet. We discuss issues like this in the committee meetings, asking if we have content on those channels, and when leads do engage with our brand, we want to know of any third-party interactions that they had previously so we can adjust for that experience.

Taking a cross-channel approach is one of the most important ways to optimize spend and drive revenue. That’s precision demand marketing—providing the right content to the right person at the right time, no matter what channel they’re on.

**Bonnie:** What are your top three marketing ops secrets for success?

**Danny:** The first secret to MOPS success is getting alignment across teams. That comes even before putting data and technology in place. You have to partner with people and take the time to knock down silos.

At Integrate, we partner with the marketing team across the buyer journey, and that’s important because buyers can engage with us across different channels, or they could be an existing customer and we’re expanding the relationship, so if we’re just focused on digital activities and we’re not on the same page about content syndication, social media, or events, the buyers could be getting mixed messages.

So, eliminating those silos is key, across marketing, sales, and finance. We shoot
for as much cross-functional interaction as possible.

The second key to MOPS success is alignment on goals, as we discussed earlier. You have to find out what marketing is expected to contribute to the business. You have to ensure that everyone agrees on what’s expected and be specific about deliverables. That solves so many problems up front. When you present to your executive team, you can frame it in terms of what everyone agreed to.

On a related note, it’s also helpful to have a way to maintain and validate your data internally. We use a Salesforce CRM-Slack integration tool called Troops. Every time an opportunity is created, I can see the data I need as it relates to the opportunity and alert people to follow up or take other actions as appropriate. It’s useful for making sure nothing falls through the cracks. Data is everyone’s job, but it’s critical to make it easy for them by putting it in their environment.

My third tip on MOPS success is about finding partners within the sales organization and aligning with them. It’s crucial to find people who are “on your side,” so to speak, and help them become successful. That’s because once other sales reps see that a program is successful, they want to be part of it, and that creates momentum. When SDRs see the impact marketing is having, they want to work with MOPS, and everyone is in a partnership. I believe marketing is sales—it just takes longer. Our job is to partner with sales and help them become successful, because if they’re successful, we all succeed.

Conclusion:

The single through-line for the majority of these tips is alignment. The MOPS leader, Danny, aligns with Integrate’s marketing, finance and sales leaders. The teams are aligned around data in the context of a single source of truth. And MOPS aligns with the company’s sales reps, creating programs that drive success for the reps, which in turn drives success for the company as a whole.

One thing to note about this strategy: it’s not all about defending the spend. By aligning with cross-functional leadership teams, collaborating within a shared source of data truth and partnering with sales reps to execute campaigns, MOPS becomes a driver of the business. Backed by credible data, MOPS can move on from the conversation about justifying the budget and

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propose campaigns based on proven impact. They’re playing offense!

Interested in hearing more about Integrate’s experience using Full Circle Insights? Check out their case study here.

If you’re also looking for a tool that can help show you a clear picture of pipeline, revenue sources, influence, and deal velocity—all in one source of truth. Look no further than Full Circle Insights. Watch a demo.

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