TAKING TECH AND OPS TO THE NEXT LEVEL

OVERVIEW

New technology has transformed B2B marketing. However, making the best use of technology investments requires more than just buying it and doing some initial integration. By developing an effective operations function, your organization can get the most out of its tech investments, resulting in a better buyer experience and more efficient staff workflows. Follow this playbook to improve your operations and take the use of your martech to the next level. This playbook should be used by marketers that already have multiple marketing and revenue technologies in place and are looking to improve them through effective operations.

OUTCOMES OF THIS PLAY

Stronger alignment with teams outside marketing

A high-performing operations function helps others in the business do their work more effectively. This is especially important because of the rise of revenue operations and the critical data that flows into and out of martech systems.

Improved return from technology investments

Operations helps your organization to get the most out of its martech purchases. By having streamlined systems and processes in place, it will be easier to measure the value of the technology investments.

PROCESS

Assess your organization and appoint an operations leader

Organizations are at very different levels in terms of both overall marketing maturity and the maturity of their marketing operations function. This is to be expected given the rapid shift towards digital channels for B2B organizations, the diversity of technology solutions, and a variety of possible approaches to aligning the digital buyer experience to sales, marketing and customer success actions.

An effective operations function helps to tie this all together through developing and improving processes, making best use of technology and data, enabling people to perform at their best, and providing accountability on performance. Given that all organizations will continually shift their technology, people, processes and data, effective operations is an ongoing responsibility. It is not a one-off assessment and implementation when your organization happens to change or adopt a key technology system.

To understand where your organization sits, assess your current operations maturity. While a number of external assessment frameworks exist (such as the SiriusDecisions Marketing Operations Maturity Model), the areas of the ON24 Maturity Assessment provide a good foundation for asking key questions:

- Strategy and Process: Does your operations function align your marketing and organizational strategy to the delivery of digital experiences? Does it document and communicate its approach in delivering on strategy?

- Data and Measurement: Is your operations function able to easily surface and provide insight on data gathered from digital experiences? Is this data integrated and correctly structured across marketing and CRM systems to enable improved experiences?

- Action: Is your operations function driving progression across the buyer journey by crafting or enabling relevant and personalized actions? Is your operations team being proactive in improving the buyer experience and the handover between teams and roles (e.g. from marketing to sales, from sales development reps to account managers and customer success teams)?

- Technology: Is your operations team working across the business to make best use of tech, improving their workflows and the overall buyer experience? Are technology systems integrated in line with an improved buyer journey?

- Audience Experience: Is your operations team proactive in making improvements to the buyer experience? Are they continually looking to adapt engagement touchpoints to improve outcomes? Is your operations team proactive in using data and feedback from buyer experiences to develop a future roadmap?

Improving your organization's marketing operations function requires a leader or champion that can address each of these areas and look to improve them. Depending on your organization, this may require a dedicated leader with their own team, or could even be a single individual with the qualities and attributes to drive change– even if only a portion of their responsibilities. In the latter case, look beyond marketing if necessary to see if such a person exists — for example, in sales operations. See if they can take on a remit that looks at the entire buyer journey and the organization as a whole.

Speak to internal users and understand their needs

Whoever is given responsibility for operations, their first responsibility should be to speak to the internal users and uncover their needs — both met and unmet. In addition to the high-level assessment above, this will give visibility into the day-to-day actions that operations needs to support. Met needs will identify areas that operations teams should consider continuing to support through any change. Unmet needs will help provide a roadmap for future changes.

Internal users include anyone that interacts with the marketing or revenue technology stack. Aside from marketing, this might include sales, customer success, finance, or product teams.

An effective way to capture this is in the format of user stories. These take the format of "As a [user type], I want [some goal or feature] so that [some reason]." Some examples might include:

- As an email marketer, I want the sales opportunity stage for a contact in the marketing automation platform so I do not send free trial offers to those already speaking with sales.
- As a performance marketer, I want firmographic information against target accounts so I can adjust my bidding strategy.
- As a sales development rep, I want to see a contact's engagement history on their contact record so I can tailor my outreach.
- As a finance director, I want to see the marketing-generated opportunities for a given quarter so I can easily report to the board.
- As a product manager, I want to see the content that our target customers are engaging with so that I can design better solutions.

Note that these conversations may initially happen in stages, depending on the most pressing issues your business faces. For example, if few marketing-qualified leads are turning into opportunities, conversations with SDRs should be prioritized.

In collecting user stories, operations teams should also look to assess the impact of the outcome. A simple framework is to divide them into three areas using the MoSCoW method, those being "Must have", "Should have", "Could have" and "Would have". For example, in the user needs, an SDR might say they: must have a first name and email address; should have territory, industry or job title; could have a phone number; and would like to have an indication of buying authority.

Review key experience touchpoints and desired improvements

The other area that an operations team should investigate is the key experience touchpoints within the buyer journey. Detailed approaches are included within the playbooks 'Marketing Action: Optimizing and Improving Experiences' and 'Buyer Action: Experience Touchpoints That Drive Buyer Journeys'.

For improvements that need to be made, an operations team should in the next stage ask:

- What is currently happening vs. what is expected or wanted to happen?
- What data fields and processes might be responsible for this experience? What technology system(s) would be used for its delivery?
- Are there any gaps resulting in underperformance of key touchpoints? For example, is there tagging missing on key landing pages? Is webinar engagement data feeding into lead or account scoring? Are live chat logs missing from contact records within the CRM?

Audit existing technology systems, processes and data flows

With both internal user needs and key buyer touchpoints mapped and collected, an audit of technology systems, processes and data flows can be carried out.

This should start first from the high-level (i.e. key technology systems and platforms) and then progress into the granular (i.e. data flows and field mapping).

During this stage, operations teams should identify and make a note of problems, opportunities for improvement, unnecessary duplication (of tech, processes and data) and key gaps (e.g. areas where data may be missing).

To win kudos with the finance team and budget holders, operations teams should also note key tech renewal dates and costs so they can make the best use of investments.

For processes, it may be necessary to return to internal users to find out how they are currently performing key actions. These can then create new user stories. As an example, if a sales rep needs to use several systems or record pages before conducting outreach, this might turn into: "As a sales rep, I want this specific data all above the fold on the contact record page so I can call/email more marketing-generated leads per day."

See the full playbook on conducting a Martech Audit and Inventory here.

Create an agile roadmap and/or backlog of improvements to make

After the steps above have been followed, there will likely be a long list of improvements that need to happen.

Adopting aspects of agile project management can be particularly effective in helping to identify and deploy key improvements. These might include:

- Prioritizing user stories or tasks for both impact and effort needed. On the latter point, tasks can be assigned points or estimated time to see what can be realistically completed in a given time period.
- Involving key stakeholders in identifying which user stories or tasks should be at the top of the list.
- Running sprints to focus efforts on a defined list of tasks or user stories within a given period.

Operations teams should also factor in the need to upskill or train colleagues in key systems, as well as accounting for urgent ad-hoc requests. On this latter point, adopting a ticketing system can help to manage such issues and log their impact on sprint progression.

Deliver improvements, gain feedback and iterate

With your operations team now processing and delivering on improvements, they should look to gain feedback as they deploy them. This will help to address any unexpected issues as well as win ongoing support through effective iteration.

As this progresses, internal users will become more effective in their roles and generate improved outcomes. Buyers will experience better journeys through improved alignment and streamlined touchpoints.

If your operations team uses agile processes, retrospectives can also provide an opportunity to reflect and improve on their performance, thus becoming more effective over time.

Continually build and reinforce the business case for operations

As mentioned at the start, operations duties should not be seen as a set of tasks to be performed as one-off events, such as the initial integration of a technology platform. Today, organizations, technology platforms and buyer expectations are in continual flux.

However, there is a risk that without demonstrating value, operations teams can be seen as a cost center. For this reason, it is necessary to continue to demonstrate value and win support from key decision-makers. In addition to using data, operations teams should strengthen relationships with those in charge of the bottom line so they can champion their work as required.

DATA

Inputs

- Internal user stories and feedback.
- Buyer journey maps with key touchpoints identified.
- CRM, MAP and other tech data.
- Tech costs and budget.

Inputs

- Delivered improvements (i.e. tasks completed).
- Impact on pipeline, renewals and other KPIs.
- Improved martech satisfaction scores

NEXT STEPS

This playbook has been written to help organizations adopt best practice for operations. However, be realistic about what your operations function can become. The size, structure and initial digital maturity of your organization will play a significant role. That being said, build on key wins as you take a pragmatic approach. Effective operations functions take time to develop, especially if there is significant firefighting to be done or legacy issues to be dealt with. If you need to progress quickly or are dealing with a lot of complexity, consider bringing a partner agency to assist. Treat standard "Quick Start" or off-the-shelf offers with caution and make sure to collect references before any engagement.

Finally, don't underestimate the power of sales and finance teams as potential partners. Their responsibility for the bottom line can provide a powerful voice when you need to make the case for additional resources.