

## Marketing Operations Planning— ●●●●● MOM's special sauce



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**By Mayer G. Becker, Principal, Intellilink**

The most effective marketing communication (marcom) organizations are those that are constantly evaluating their operations. With hundreds of projects underway at once — direct-mail campaigns, catalogs, Websites, e-mail, ads, posters and slide shows for meeting and trade conferences — you name it — marketing operations planning is at the heart of an effective marcom function.

Some progressive marcom departments have adopted an automation platform such as a marketing operations management (MOM) application. A MOM application can bring order into chaos, helping to prioritize activities, schedule tasks, track project status, and easily retrieve valuable digital intellectual property such as logos, photographs, and graphics. Before jumping aboard the MOM bandwagon, though, organizations need to be sure their internal processes are working efficiently. As a wise person once said, the worst thing in business is to automate a bad process.

### PLANNING IS KEY

Whether or not your organization is moving to automate its operations management, you would be well advised to review your processes with an eye towards improving them. The most important steps to take initially are to develop a taxonomy, conduct an inventory and locate all digital assets, establish workflow and labor standards, and define evaluative metrics and reporting intervals.

- **Taxonomy.** It's very important to have a common language that describes the steps in a marketing project. Lacking a standardized taxonomy, one group would call a step “x” and another would call it “y.” The same is true for digital assets used in marcom projects; “BW” and “B\_W” might both refer to “black and white.” Standardizing the taxonomy is crucial if you intend later to automate your processes; without a common language, critical information could get lost within the system.
- **Assets inventory.** Once the taxonomy is clarified, a further step is to make an inventory of marketing assets so they can be categorized with the new taxonomy. You should also gather important facts about ownership and licensing if the assets were obtained outside the company. Digital asset management software is available to automate the storage and retrieval of digital assets; many MOM applications like Aprimo and MarketingCentral include such a feature.

“Are your day-to-day processes Documented?”

- **Workflow and labor standards.** Are your day-to-day processes documented? How are your direct-mail campaigns carried out? How is the Web site updated? How much time is required of a marcom resource (e.g., writer, artist, approving manager) for each step? Laying out the process and timeframe for these and other activities is necessary for standardizing tasks and clarifying expectations among the

internal “clients” of a marcom department. If you then implement MOM software, you can create reusable templates for repeated operations based on the defined workflow.

- **Evaluative metrics.** “Is my project on time?” “Do I have budget left?” “What should I be working on today?” Clients, marketing department executives, and marketing staff need to know the status of marketing operations. Metrics, or Key Performance Indicators (KPI), must be developed and a reporting process put in place so that everyone has access to the status of projects and relevant information about the budget for marketing communications.

### TOWARD A CALENDAR-DRIVEN OPERATIONS PROCESS

Once these preliminary tools and programs are in place, the next important step is to integrate information from four calendars into your workplan: the public calendar, the calendar for your industry, your product calendar, and your company calendar.

- **Public calendar.** The public calendar tells you which days of the year are not available: Labor Day, Thanksgiving, and any other public holidays when employees do not work.
- **Company calendar.** Every company has its own scheduled events that affect marcom. Public companies, for example, report their financial results on set dates, and certain types of information can and cannot be communicated around these times. The company calendar can be obtained from the finance department, investor relations, or corporate communications.
- **Industry calendar.** Every industry has its yearly cycle of trade shows and other events, from Interop to the Paris Air Show. For complex organizations, that might mean multiple shows in multiple markets, each requiring a hefty marcom effort. An industry calendar also shows consumer cycles: the Christmas selling season, for example, requires that marketing materials be ready by a certain date to get them into stores and to channel partners on time.
- **Product calendar.** Many companies, from the auto industry to software, schedule new product releases for a specific date, sometimes coinciding with a trade show, user group meeting, or other industry event. Also, product calendars are closely tied to financial projections for a product, product line, or market segment; they may be found in written marketing plans. When integrated, these calendars provide extended visibility into the work schedule for the year to come. The resulting schedule gives a clear picture of what everyone must do by clearly specified milestones and deadlines.

### ALWAYS A TEAM EFFORT

Marketing operations planning is the responsibility of marcom leadership. The Director or Manager who heads

marketing communications is the logical person to be in charge. Other participants might include the creative director, a head writer, and a production manager, depending on how the organization is structured.

To develop the integrated calendar, Marcom leadership meets quarterly with product managers or other internal clients for a “tactical planning” exercise to decide the deliverables required to support revenue goals. True to its role as a service organization, marcom team members advise their clients during these sessions and guide them through creation of an integrated marketing plan for each product or product line. Where a company has agency partners, account management should also participate in these planning sessions.

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By initially fleshing out the schedule for a full year and then focusing on quarter by quarter (one quarter ahead, since many projects have long lead times), the team can think through the bigger picture and see opportunities for cross-utilization of content and materials. The result? An efficient, well-run marcom organization!

### CONCLUSION

Without clear-cut processes, the default procedure within marcom organizations is to work on the task facing an immediate deadline. With proper planning, it becomes easier to keep priorities, rationalize timelines, and track project status. A well-constructed marketing operations plan also helps when handling emergencies that arise, such as the need to quickly counter a competitive threat, by providing visibility into the impact of diverting resources.

And if you automate your processes, a taxonomy, asset inventory, workflow and labor standards, metrics, and an integrated calendar are ingredients of the special “sauce” that makes “MOM’s” process smooth. With marketing organizations asked to do more with less, a highly efficient marketing operation benefits the entire company and helps position marketing as a leading contributor to its clients’ success.

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