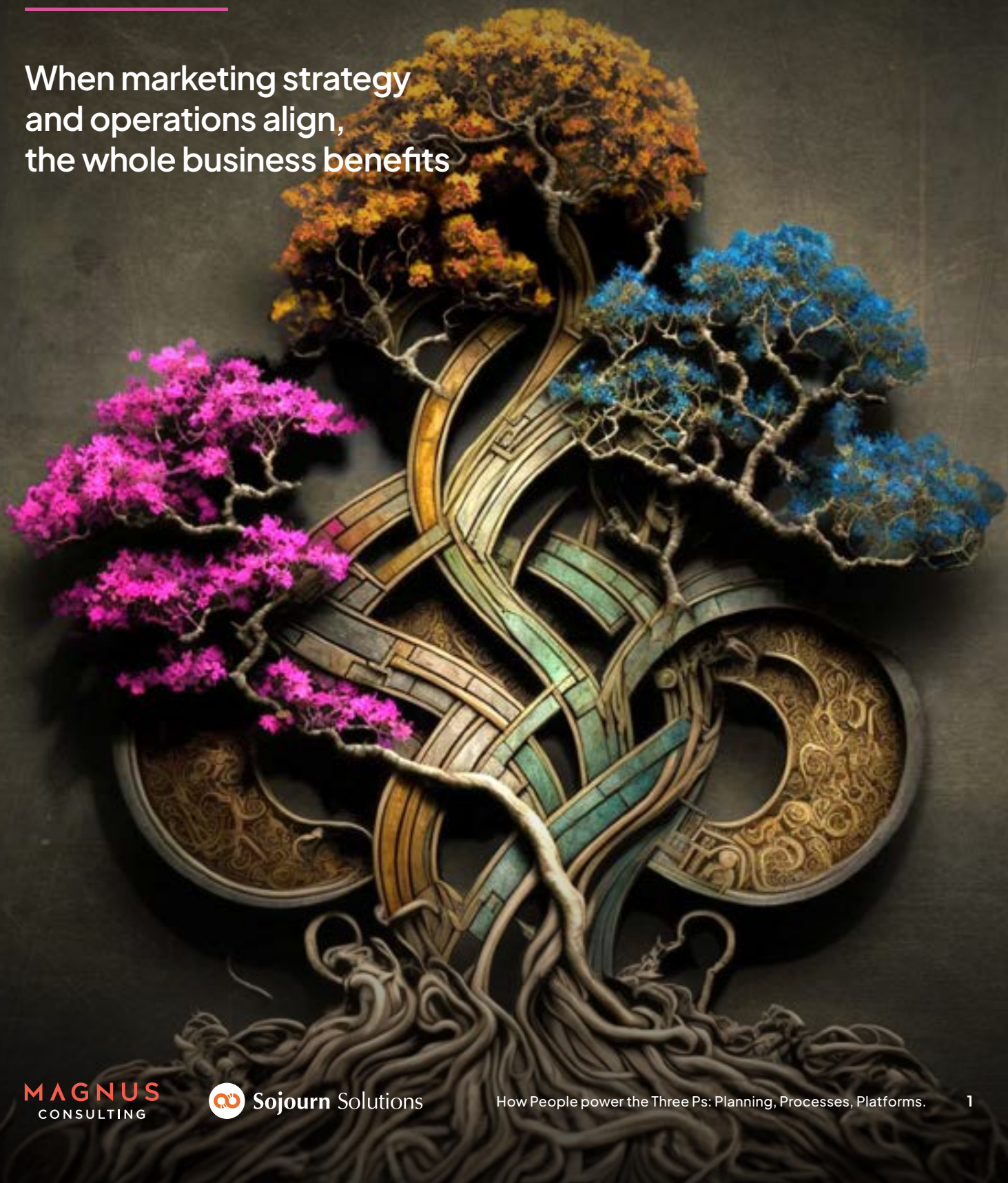


How People power the Three Ps: Planning, Processes, Platforms

When marketing strategy
and operations align,
the whole business benefits



Executive summary

To make your marketing team smarter, more efficient and truly effective, it's essential to ensure marketing strategy and marketing operations are aligned. Clear planning, strong processes and the right platforms sit at the heart of successful marketing teams. Yet, it is people that power the effective development of each and benefit most from their alignment.

This 10 step guide, created as a partnership between strategy experts Magnus Consulting and operational specialists Sojourn Solutions, will help marketing leaders empower their teams and improve their campaign success. It covers the following key tenets of great marketing functions:

1. [Putting your people first](#)
2. [The Three Ps aligned in service of people](#)
3. [Planning that supports people](#)
4. [Processes that enable people](#)
5. [Platforms to empower people](#)
6. [Training that enables people](#)
7. [Fostering a culture of improvement](#)
8. [Bringing your people along](#)
9. [Making it happen](#)
10. [P Assessment: People, Planning, Processes, Platforms](#)

Putting your people first

An often-forgotten truth: business is all about people. And marketing is about people reaching other people – decision-makers. And even with the best martech stacks in the world, the most embedded processes and the biggest budgets, businesses who forget to put people first in their thinking are likely to finish last in the battle for eyeballs and actions.

And it's not just the people you are marketing to: it starts with the people doing the marketing. When they are given what they need to succeed, they will be the people bringing tangible and intangible benefits to the business, providing innovation, creating value and delivering for customers – and ultimately for the bottom line.



“1 in 4 employees say their organisation doesn’t celebrate accomplishments or learnings”

Officevibe data¹

In both marketing strategy and operations, at a macro and micro level, it is your people who are defining and implementing plans, driving things forward, optimising campaigns and working out how to make the most of all that shiny martech.

There are countless products and techniques out there that claim to drive efficiency and effectiveness, but are they the right ones for your team? If you don't start with understanding your people and the people they market to, you may well end up with misaligned planning, processes and platforms in place, rather than ones that will support them to achieve your business goals.

Looking at both strategy and operations – what you want to achieve and how you can achieve it – in parallel, rather than as separate concerns, is always going to be a more effective way of delivering as a marketing team.

That's why partnerships, such as that between strategy consultancy Magnus Consulting and marketing operations consultancy Sojourn Solutions, are so impactful in increasing the effectiveness of marketing in delivering value to B2B organisations. Magnus Consulting delivers growth through marketing transformation, delivering the overall strategy, while Sojourn Solutions works with marketing leaders and their teams to prove and improve the value of marketing through robust marketing operations. Aligning the two creates a significant increase in the contribution of marketing teams to achieve business goals.

The Three Ps aligned in service of People

The power of three is a popular concept, and in this case it's entirely justified. The triumvirate of Planning, Processes and Platforms – the Three Ps – is a structure at the foundation of successful marketing teams.

If one of these three is out of alignment with people, the whole enterprise is in peril. For example, your organisation might have a clear long term strategy in place supported by a strong ecosystem of effective martech platforms. But if the processes are weak at a foundational level, interaction between individuals, teams and functions could be affected, data siloed, insight untapped and value ultimately wasted.

“When an organisation’s sales, marketing, and product functions are aligned, that organisation achieves 19% faster revenue growth and 15% higher profitability.”

Forrester, 2022²



While Planning, Processes and Platforms are all needed to ensure the structure is stable, it is People that power the effective development of each and benefit most from their alignment. When all are aligned, you have the strongest structure you could hope for, with peak performance in marketing, high efficiency and optimum effectiveness.

It's essential, then, to consolidate and harness your organisational strengths, from planning and processes to the real-time end-to-end data you collect through platforms, creating a powerful, single-minded unit that puts the customer unequivocally at the heart of every business objective.

So how can you identify weaknesses in your marketing structure that mean planning, processes and platforms aren't performing as one?

8 challenges in broken structures

If you see one or more of these key challenges occurring in your marketing function, you almost certainly have some imbalance within your structure.

1. MISALIGNMENT BETWEEN INDIVIDUALS, TEAMS AND FUNCTIONS

You may see, for example, Marketing and Sales teams not sharing revenue targets, or changing the qualification criteria without talking to one another. Perhaps your Marketing and IT teams disagree on the use of martech and data to enhance customer experience (CX). Any number of other sources of friction could be causing misalignment in your organisation.

2. WASTED TIME, EFFORT AND BUDGET

What might this look like? From ineffective campaign briefing with an obscure audit trail and no agreement on SLAs, to martech that is barely leveraged or no longer meets its purpose, to duplication of efforts in campaign and programming QA. A lack of communication leads to wasted resources and shows imbalance across all planning, processes, and platforms.

3. COMPLEXITY CAUSING INEFFICIENCY, INFLEXIBILITY AND CONFUSION

Over-complicated processes or an ad hoc approach to platform adoption can lead to confusion for the people who have to work with them. For example, multiple lead management processes might exist even when divisions have similar customer journeys, martech tools might not have kept up with business changes, and valuable data can remain in silos rather than being leveraged and optimised.

4. SHORT TERMISM

With short-term KPIs and no clear long-term strategy, it is a challenge to give customers a sense of consistency and to create campaigns that are compelling and optimised. For example, following mergers your martech and processes may not be revisited to reflect updated goals. Equally, if campaign results are not measured and revisited with test-and-learn, then future initiatives will lack valuable insights.

5. PROBLEMS WITH PERFORMANCE, MORALE AND RETENTION

A lack of clarity around roles and responsibilities can mean work is duplicated or omitted completely, while a culture that never celebrates wins small and large, especially during transformation, leaves people unmotivated. Constantly changing goals and objectives, as a result of poor planning, will frustrate people and leave them unable to bring their best to the job.

6. LACK OF EMPOWERMENT

People need to feel a sense of ownership and accountability if they are to feel empowered to contribute effectively towards business goals. When marketing is not viewed as having the leadership or skills needed to drive revenue, the people working in that function feel powerless.

7. INADEQUATE CUSTOMER FOCUS

Where the marketing function does not champion the customer and suffers from a lack of customer insight to lead the marketing strategy, that impacts the customer experience, acquisition and loyalty. A narrow-focused, inward-looking marketing team will find it hard to galvanise the customer and increase revenue.

8. POOR CREDIBILITY

Without effective measurement and proof, marketing is often seen as a cost centre rather than a revenue driver. That means the team may lack the autonomy to design and execute its own strategy and is instead seen as merely a support function for the sales and product teams.



Ask the following questions to **assess whether your people are being supported by the Three Ps**:

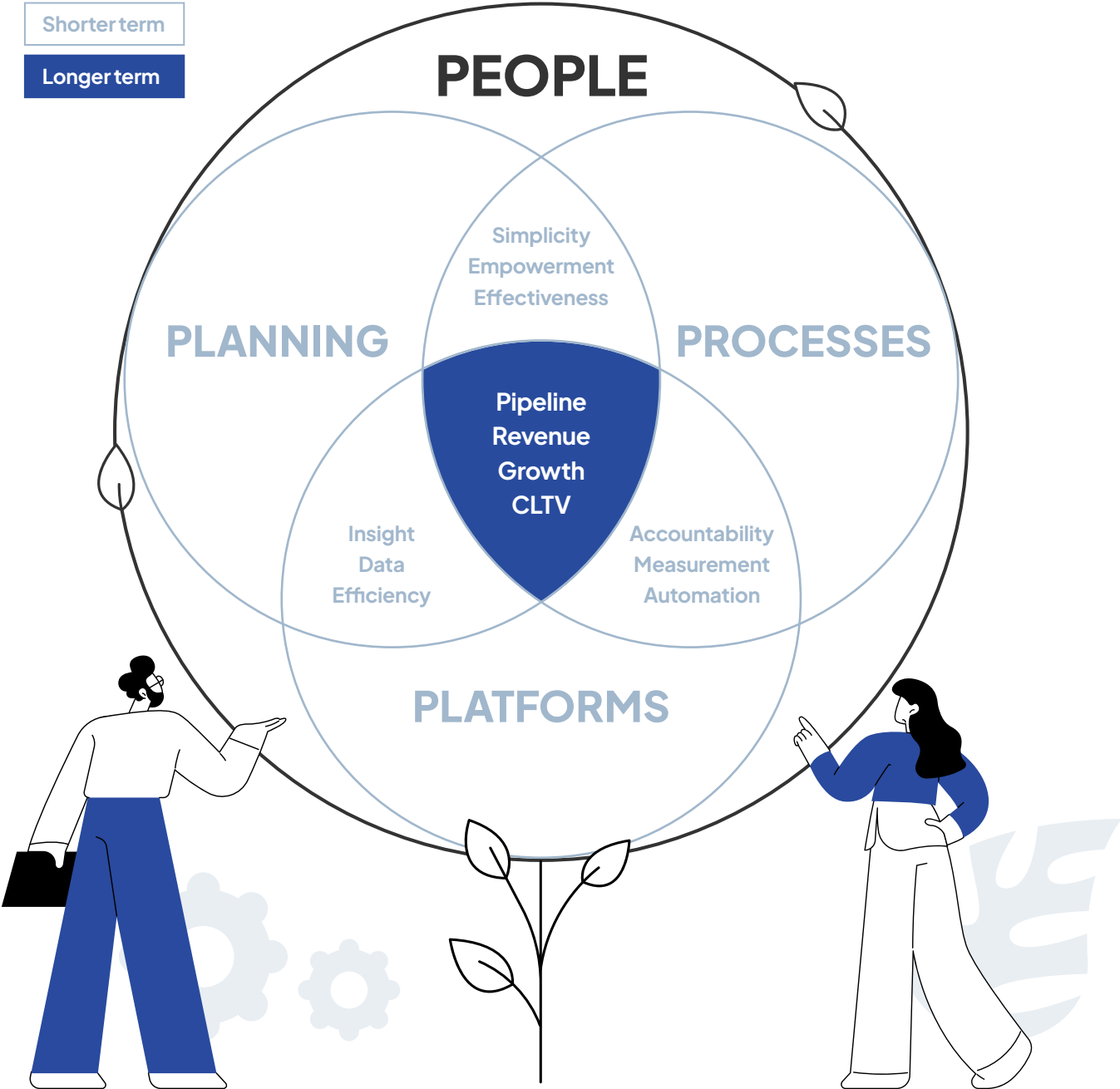
1. Does the marketing team **have the skills, plans, processes and platforms** needed to fully support the business objectives within your organisation?
2. Do they know **what success looks like**, and what they are measured on?
3. Do they **actively participate in your organisation's multifunctional governance committee**, for example by working with members of sales and customer success teams to deliver a holistic approach to customer experience?

The benefits of alignment

These challenges can all be mitigated to some extent by building closer alignment between strategic and operational objectives – in other words, between Planning, Processes, and Platforms for the benefit of People.



- Shorter term
- Longer term



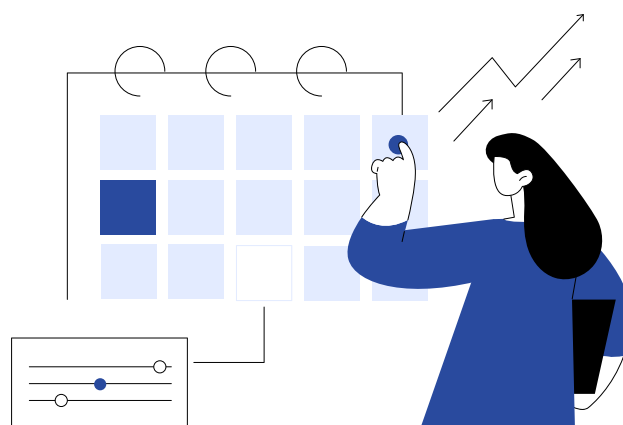
Planning that supports people

By failing to plan, you are planning to fail. So goes the well-known adage, and it couldn't be more relevant to marketing teams responsible for driving growth within their organisation. A clearly defined plan gives the whole function a long-term common goal and a set of objectives to execute from – avoiding the pitfalls already covered in section 2.

Yet while the benefits of a long-term strategy are widely accepted, short-termism is increasing when marketing performance is measured, with

33% of global executives stating reporting cycles are getting shorter, with only 12% saying they are getting longer

according to 2019 research by the Financial Times and Effworks³.



And with shorter reporting cycles come more reactive teams, chasing quick wins and responding to the requests of other functions rather than planning for consistent effectiveness.

How to overcome this? Firstly by putting an overarching strategy in place to act as a roadmap for marketing and marketing operations (MOPS) teams. Secondly by empowering teams: giving them the right roles and responsibilities to deliver on the plan and deliver growth for the business.

CREATING A ROADMAP FOR TRANSFORMATION

To understand the current state of the marketing function within an organisation, Magnus Consulting undertakes a diagnosis using its Magnify framework, resulting in a one-to-three-year roadmap for marketing transformation.

The process begins with a detailed deep-dive into your business, to understand the motivations, ambitions and ability to change, informed by internal interviews, desk research and surveys. This gap analysis leads to a strategic planning workshop looking holistically at the Purpose, Product, People, Process and Performance of marketing in your business.

Planning that supports people

By undertaking a genuinely thorough analysis of each of these areas, it is possible to create a robust plan for marketing transformation, from job descriptions to an implementation approach, that will support the people involved to fulfil their potential for the marketing function, eliminating the uncertainty that can lead to low morale.

Perhaps most importantly for the long-term health of the marketing team, this will allow more rigorous measurement, proving marketing's importance in the business not merely as a support for other functions such as sales but as a revenue driver in its own right.



BUILDING A BEST-IN-CLASS MARKETING ORGANISATION

Proving the point, Magnus Consulting's role with Acacium Group – the UK's largest healthcare solutions partner – involved working within the largest division of Acacium to assess the current role and effectiveness of marketing and the people within it, and to provide outsourced marketing.

That meant developing a future definition, vision and structure for Acacium Group's marketing, as well as marketing strategy, working processes, measurement framework, tech stack and transition plan. Magnus led the marketing transformation inside out, as interim marketing director, and appointed new FTEs within the new team structure.

The result was a unified centralised team with goals clearly aligned to the private equity-led business strategy. Marketing was positioned and organised to be a growth driver with measurable value and a clear strategic role in the organisation and a highly capable and motivated team.



Ask the following questions to **assess your planning**:

1. Do you have a **defined marketing strategy (roadmap)**?
2. Is it **clearly communicated** and universally understood?
3. Is the marketing **roadmap linked to the overarching strategy and vision** of the business?

Processes that enable people

Process might sound like the least exciting element of marketing effectiveness, but getting it right can lift every element of the function, enabling people, activating the plan and leveraging platforms to the maximum extent.

And it's getting just that right balance that makes the difference. Too much process and you have a cumbersome, frustrating juggernaut. Too little and you have no accountability, consistency or accuracy.

Process is certainly the least sexy of the three enablers. Having standards and best practices around operational processes doesn't erode marketing creativity; it empowers people with consistent ways of working that drive overall business value.

Untangling and re-establishing the processes in a marketing team is a delicate business that, if undertaken carelessly, can cause unintended consequences. But the results can be exceptional.

As a result of Sojourn Solutions role for UK telecoms company O2, a transformation of process in the marketing department led to a 27% increase YoY in the number of campaigns executed, and 100% accuracy in campaign execution – even with a 50% budget cut.

“We re-organised our team internally and upskilled their capabilities. We worked with Sojourn to introduce Smartsheet for brief logging and workflow management within our team and cross-functionally with our external agencies. It's made a big difference. Now we're constantly reviewing processes and optimising ways of working in weekly collaboration sessions.”

Nicky Clarke

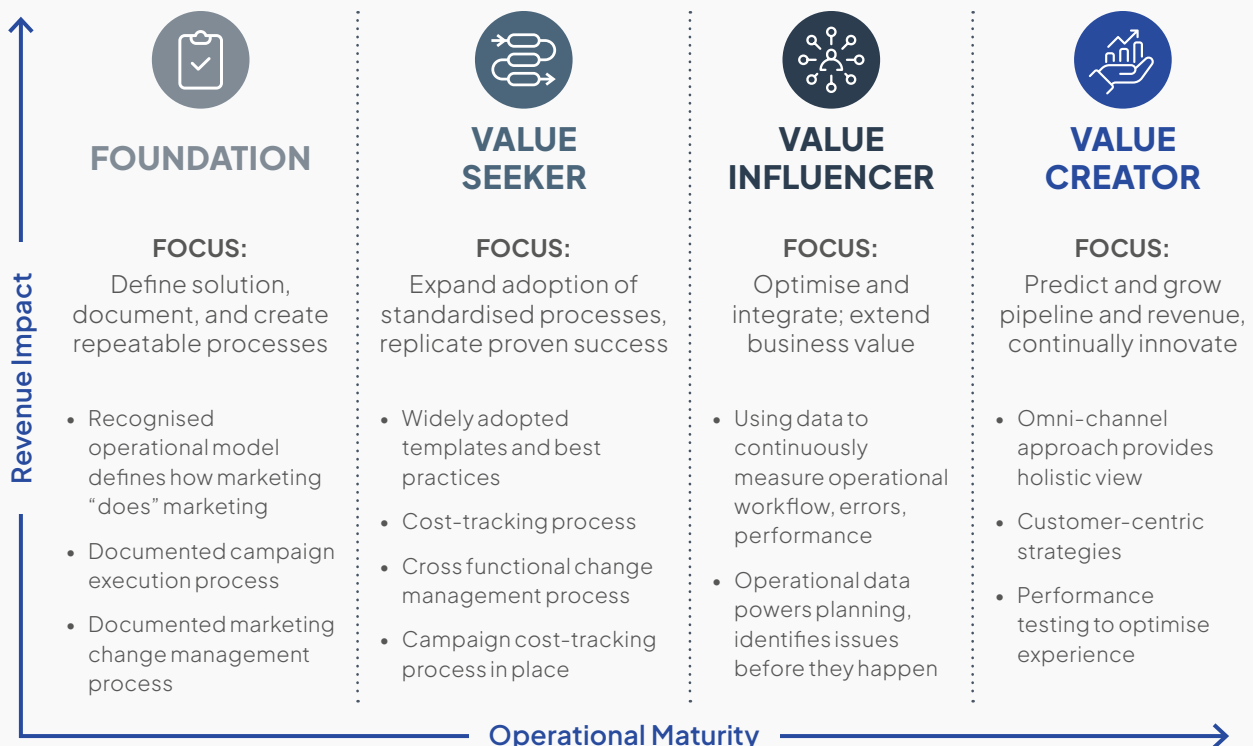
Senior Marketing Operations Programme Manager
Virgin Media O2

How good are your processes?

So where do you start in assessing the quality of your processes? Sojourn's team uses a model of Process Maturity to establish where an organisation sits on the journey to operational efficiency. This places a business in one of four groups of increasing excellence in process maturity: Foundation, Value Seeker, Value Influencer and Value Creator.

OPERATIONAL PROCESS

Process alignment to drive **marketing efficiency and effectiveness** and business growth



Ask the following three questions to **assess your processes**:

1. Does your Marketing team have a **consistent process** to define and evaluate your contribution to the business?
2. Do you have an **internally recognised operational model** that defines how your team members support the full marketing organisation? If yes, have you developed templates and best practices that have been adopted within the function?
3. Do you have a **Centre of Excellence** to innovate and test new processes, tools and approaches?

Platforms to empower people

Marketing Operations maturity is key to realising the full value of martech, from strategy to integration to adoption and beyond.

Marketing Operations optimises the relationship between marketing and technology. It's no accident that the stronger a company's marketing operations function, the better they do (1) deciding on the right technology and (2) integrating that tech into their organisation, meaning, not just systems integration but also having the right people with the right training so that the technology actually delivers value.

Designing your martech stack should be a strategic choice – not just buying the latest martech because other marketers are buying it or a vendor promises you eternal joy and sunshine.

Time, people, and money are limited resources, and while it might seem that the cost of upfront strategic work is high, the costs of NOT doing it are absolutely devastating for any marketing organisation. Buying martech without a strategic focus is marketing malpractice at its wasteful worst. Ideally, it should be driven by Marketing Operations to support and enable the long term plan.

Of course, once those decisions are made, martech integration is a high-stakes process. The long and often arduous process of integration must be completed before any value can be extracted from martech and even then, few organisations take full advantage of a given technology's capabilities. Companies with a named operations function are more than twice as likely to say that martech integration is a significant strength⁴. That's why planning your integrations well in advance is key.



You need to get everybody involved in the same room at the start and build a roadmap. You should have discussions around what needs to happen, hash out disagreements, and then define a consensus around who does what and when, what data should flow in and out, the timing of everything and how to handle potential disruptions, along with what steps are required to make the whole integration process work.

Driving the adoption, use, and optimisation of martech is important, because only martech that is successfully leveraged will make a measurable difference on marketing outcomes.

Marketing Operations professionals, and everyone else involved in the adoption and change management process, should listen for red flags and feedback – such as, “We’ve never done it this way before,” “I don’t know how to use the new tool,” or “Are you sure this new tool is going to work for us?”

Your martech adoption plan should address how the new martech fits into your existing playbooks and processes, including whether new resources are required to help deliver on its value. It is essential for marketing organisations, led by Marketing Operations, to track and analyse the innovation in technology trends, with business goals and the technology roadmap for context, and to maintain an ongoing conversation with IT partners about what’s necessary today and what’s emerging for the future.

A mature Marketing Operations function helps support the change management that exists in/around martech, and other areas of marketing. The organisations that are best positioned to manage change will have a clear competitive advantage.

When you hire and develop curious people who are willing to adapt and change, you also drive the adoption and optimisation of your martech stack.



Ask the following three questions to **assess your platforms**:

1. Does your **martech strategy** begin with choices and priorities based first on a clear understanding of your customers, their journey/touchpoints, and how you seek to address their needs with the resources you have?
2. Are your core **marketing technology platforms fully integrated** with a clear plan to manage current data flows and future changes?
3. Are your martech adoption and maturity levels **measurably aligned to increase business value**? For example, extending and leveraging the tech increases pipeline and revenue?

Ensuring your people are supported to deliver

Whilst the first half of this guide has demonstrated that people drive planning, processes and platforms. The second half will highlight how we can support and empower our people with the right training, culture of improvement and change management in place.

Training that enables people

Perhaps the most important bridge between Marketing Operations and Strategy, training and enabling people will build solid opportunities to prove and improve on what Marketing does for the business.

And training is not purely the purview of Human Resources – it is a core remit of Marketing Operations. It must be prioritised if your people are to assume a marketing effectiveness mindset and support all the other initiatives in building a solid marketing function.

To get that training right, you have to start by understanding what you have already within the team. What gaps are there, and how do they impact the strategy and business goals? How can you benchmark performance and how will you measure improvements, optimise your plan and set the targets your people will be aiming for?

Of course, training is not purely about learning new marketing and martech skills. It should involve building a cultural focus on improvement, with Marketing Operations the custodian of this progress. Why? To steer the direction, monitor performance and accelerate progress, ultimately proving the value of marketing within the organisation.

Fostering a culture of improvement

While you might have a central leadership team for training, it's essential to instil a culture of ongoing improvement into your whole marketing team. Each member should not only be pulling their weight but should feel motivated and inspired to optimise their campaign performances constantly through their work.

This means ensuring teams develop the discipline of gathering learnings through wash-ups and debriefs after projects and campaigns, being honest about what worked and what needs to improve – without fear of blame.

When Sojourn Solutions worked with apps developer Progress Software to move from single to multi-touch attribution, one of the key takeaways for the leadership was the importance of honest, open assessment within teams.

“You’re not saving lives, you’re learning along with everyone else,” shared the Director of Marketing Operations at Progress Software, pointing out that it’s also important for leadership to give space for people to fail and learn from those failures, in a process of continuous learning.

Progress Software saw a significant improvement in the efficiency of its marketing function, which also boosted the credibility of marketing within the C-suite, and the culture of improvement was a key driver in that result.

“You’re not going to be done, ever. There’s always going to be something more that you want to know, a gap you’ll want to fill.”

Carmen Gardiner

former Director of Marketing Operations
Progress Software

As well as reviewing ongoing work, it is crucial to critically evaluate your marketing organisational model. Are you deploying your people appropriately? Should they be more centralised or decentralised? Is there an extended team that needs the same level of engagement in reviews as the core team?

This should be a careful process that involves considered decision-making, solid research and review processes, and input from other functional areas of the business, such as HR.

Bringing your people along

With the best will in the world, if your people don't feel engaged or involved with the strategic and operational changes you make in your marketing team, progress will be slow, difficult and can lead to consistent failure.

“Without effective organisational change management, company transitions can be unpredictable and expensive in terms of both time and resources,” according to an article by Tim Stobierski on Harvard Business School Online⁵.
“They can also result in lower employee morale and skill development.”

People are complex, their motivations often obscure, but one thing that almost everyone benefits from is being trusted and informed by their leadership teams. And that is not something that can be left to chance. It's essential to implement a programme of change management for successful organisational transformation that meets your overall business goals.

In fact, according to Prosci, initiatives with excellent change management are consistently shown to be six times more likely to meet objectives than those with poor change management.



“By proactively engaging, equipping and supporting people during times of change, you demonstrate in words and deeds that you truly value them. And the entire organisation benefits as a result.”

Prosci, Change Management Best Practices ⁶

The most important element of change management is communication – and that doesn't simply mean sending out a few emails. It means speaking directly to the fears and hopes of your people, in multiple touchpoints, whether that's informal chats or town hall meetings.

“In addition to using email as a tool, you should consider fireside chats, one-on-ones, leveraging frontline managers, an open Slack or team channel,” said Leigh Burger, Adobe's Principal Customer Success Manager, during a webinar called The Anatomy of Change⁷.

Bringing your people along

As well as addressing fears, it's important to articulate the vision for the future, while inviting input from the people who will work within it, to create a sense of conversation, to understand what they are thinking about, and to identify any potential obstacles or naysayers who might need a little extra care.

That vision can include the reasons for change, helping people appreciate the business need behind any transformation. It should also address the timeline of the changes being made and identify the teams that will be particularly affected, to mitigate any sense of uncertainty in the teams.

“The single biggest problem with communication is the illusion that it has taken place.”

Leigh Burger

Principal Customer Success Manager
Adobe



If strategic and operational transformation are on the cards for your marketing function, there are no shortcuts, but the steps in this article will offer you a strong framework for approaching this complex process.

1 PUT PEOPLE FIRST

Martech, processes and big budgets aren't enough: it is your people who are the key to achieving your business goals and making your marketing function successful. Everything you do should take them into account and support them to do their work better.

2 ALIGN THE THREE PS WITH YOUR PEOPLE

Planning, processes and platforms are the three cornerstones of a successful transformation, supporting people within the organisation.

3 SUPPORT WITH PLANNING

An overarching strategy, understood by the whole team, is an essential tool to act as a roadmap for the marketing function, ensuring your people are aligned and working towards the same business goals.

4 ENABLE WITH PROCESSES

Process isn't just about setting parameters and rules. When carefully put together, at the right level, process offers a powerful way to empower your team, help build accountability and work to prove success.

5 EMPOWER WITH PLATFORMS

Platforms need to be successfully integrated and leveraged with high adoption – plus a focus on on-going optimisation – to ensure they are making a measurable difference to marketing outcomes.

6 SUPPORT WITH TRAINING

When you have fully mapped out the needs of your team, you can understand the gaps in training and, rather than leaving people to swim upstream, support them by giving them the right information on everything from your martech to strategy.

7 BUILD A CULTURE OF IMPROVEMENT

It's important to be able to constantly evaluate and improve on your performance, and this goes through all the layers of your team. Encourage reviews and audits with a no-blame culture that simply enables team members to identify what works and improve what doesn't.

8 COMMUNICATE ON CHANGE

Don't leave change management to chance – leaders who bring their teams along with them have a significantly higher record of success than those whose people suffer uncertainty and low morale because of poor communication.

9 BRING IN THE EXPERTS

This is a big job, so it makes sense to collaborate with people who've done it successfully many times over. Magnus Consulting's strategy expertise combined with Sojourn Solutions' experience in driving operational effectiveness is a partnership that offers efficient and effective transformation across the board, avoiding silos, disconnects and misunderstandings.

P Assessment: People, Planning, Processes, Platforms



To help you as a marketing leader empower your teams and improve the success of your marketing, we have created the P Assessment: People, Planning, Processes, Platforms.

These 12 questions act as a framework to assess whether your marketing strategy and operations are aligned with clear goals, processes and platforms. Specifically, they analyse whether your people are being supported by planning, enabled by processes and empowered by platforms.

PEOPLE

1. Does the marketing team **have the skills, plans, processes and platforms** needed to fully support the business objectives within your organisation?
2. Do they know **what success looks like**, and what they are measured on?
3. Do they **actively participate in your organisation's multifunctional governance committee**, for example by working with members of sales and customer success teams to deliver a holistic approach to customer experience?

PLANNING

4. Do you have a **defined marketing strategy (roadmap)**?
5. Is it **clearly communicated** and universally understood?
6. Is the marketing **roadmap linked to the overarching strategy and vision** of the business?

PROCESSES

7. Does your Marketing team have a **consistent process** to define and evaluate your contribution to the business?
8. Do you have an **internally recognised operational model** that defines how your team members support the full marketing organisation? If yes, have you developed templates and best practices that have been adopted within the function?
9. Do you have a **Centre of Excellence** to innovate and test new processes, tools and approaches?

PLATFORMS

10. Does your **martech strategy** begin with choices and priorities based first on a clear understanding of your customers, their journey/touchpoints, and how you seek to address their needs with the resources you have?
11. Are your core **marketing technology platforms fully integrated** with a clear plan to manage current data flows and future changes?
12. Are your martech adoption and maturity levels **measurably aligned to increase business value**? For example, extending and leveraging the tech increases pipeline and revenue?

See how we can support you

We help to make your marketing team smarter, more efficient and truly effective by ensuring the Three Ps are supporting your people.

If you'd like to explore how Magnus Consulting and Sojourn Solutions can help with your strategic and operational journey, please get in touch here.

GET IN TOUCH

MAGNUS CONSULTING

Magnus is a B2B growth consultancy. We identify opportunities, design the strategy and build the right team to engage your customers and unlock better growth.

This isn't about financial growth at any cost. It is moving forwards with purpose, doing things better, and adding value. Delivering growth that reaches and retains customers, withstands market turbulence, and sets the business up for future success.

Magnusconsulting.co.uk

Sojourn Solutions

Sojourn Solutions is a growth-minded marketing operations consultancy that helps ambitious marketing organizations solve problems while delivering real business results.

Our growth has mirrored the exponential growth of marketing operations capabilities globally as well as the influence of marketing leadership. Now more than ever, we are positioned to help you prove marketing's impact to revenue – from our proven approach, to our team, to our partners. Together we can!

sojournsolutions.com

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