



The Ultimate Buyer's Guide to Marketing Operations Software

How to select the right planning, budgeting, and
workflow capabilities to meet your specific needs

Choosing the Right Marketing Ops Solution

Performing an efficient evaluation of new technology can be daunting and is typically resource-intensive. Making the best decision for marketing operations software includes getting buy-in from other stakeholders such as finance and requires time to conduct research along with careful due diligence. That's why we've created this guide to ensure you have practical tools and tips such as a handy scorecard to help you evaluate software and make the best choice for your marketing team.



"To position marketing as a business driver and be proactive amid changing market conditions, marketers must incorporate stronger end-to-end planning and coordination. This starts with connecting financial planning to marketing performance."

FORRESTER MARKETING RESOURCE MANAGEMENT WAVE™, 2022

In Deloitte's 2022 Global Marketing Trends Survey¹, following are three outcomes² executives hope to achieve:

Top three outcomes executives hope to achieve

Improve productivity and efficiency

42%

Accelerate your move to digital platforms/technologies

39%

Improve engagement with your customers

37%

To achieve these goals, first understand that not all marketing operations software is created equal and significant change management will be required to truly transform how you run the business of marketing. Consider these six factors when selecting the best solution:

Critical Factors	Questions to Ask
Purpose-built for marketers Marketers' need a system built for marketing, not the CFO. That's because marketing planning is fundamentally different from Enterprise Performance Management. The solution must bridge the gaps between marketing strategy, budgets, campaigns and performance. If not, marketers will just spend their time trying to connect the dots in spreadsheets, instead of marketing.	<ul style="list-style-type: none">• Does the system connect all marketing processes from planning to investing to executing to measuring performance?• Is the system able to support marketing taxonomies that cascade plans, budgets and work streams?• Does the solution enhance collaboration between teams or support content reviews with external agencies?

1 2022 Global Marketing Trends, Deloitte (2022) www2.deloitte.com/content/dam/insights/articles/us164911_gmt_2022_master/DI_2022-Global-Marketing-Trends.pdf

Able to meet the needs of complex enterprises

Organizations need a solution built to serve the enterprise; one that can scale to support a limitless number of marketing activities and transactions without impacting performance. The solution must support complex workflows tailored to unique enterprise requirements. It must support stringent measures to protect its systems and customer data. And it needs to offer a wide range of integrations with enterprise marketing and financial platforms.

- Can the platform seamlessly integrate with other systems and extend into the broader business technology ecosystem?
- What type of third-party validation is conducted?
- What's the vendor's data protection policy?
- How are users authenticated in the system?
- Is there single-sign-on and authentication that complies with enterprise security standards?

A true partnership

Marketing business acceleration software requires change management, which isn't easy. Having a vendor that understands best practices and can support you and your organization with the internal process changes required will help set your team up for success.

- Are best practices offered on a continuous basis?
- How does the vendor guide and challenge your team to improve their level of sophistication?
- Does the vendor have a maturity framework or model in place?
- How does the vendor support change management within your marketing organization?

Positive customer validation

Any vendor can claim their software will deliver results. The real proof is in their marketplace standing and longevity through its ability to continually evolve with customer needs. The right vendor can also demonstrate a track record of success with a range of enterprises across industries, backed by case studies, reviews, and testimonials from those whose words matter most: customers.

- Does the vendor offer case studies and testimonials to that prove real business benefits for customers?
- Are you able to speak to the vendor's customers directly?
- Are there product reviews available? If so, what are the themes including both the good and bad?
- What has been the outcome of industry analysts' evaluations?
- What other offerings, services or programs are offered to connect you with peers across the vendor's customer base?

A strong product vision

Having a solid product roadmap and vision that will meet the needs of marketers in the future is imperative. Check to see that the vendor has received top points for their product vision from industry analysts by downloading [Forrester's 2022 Marketing Resource Management Wave™](#).

- How does the vendor see the world of marketing operations evolving?
- Are there different user experiences offered in the platform, such as for marketers or finance?
- How will the vendor's product roadmap support your journey?
- How did they score on product vision in Forrester's Marketing Resource Management Wave?

Key Capabilities Scorecard

Use the following scorecard for each vendor when evaluating a marketing operations suite or platform. Add up scores and look at which areas you have the highest ranking. Ultimately you want to choose a vendor with top scores in the areas you care the most about.

Score		Level of Importance	Prioritize by asking yourself...
4	Feature is highly developed	High	Is this requirement essential to my organization or objectives?
3	Feature is adequate	Medium	Is this requirement highly desirable, but not necessarily essential to my organization or objectives?
2	Feature is sub-optimal/poor	Low	Is this requirement optional, and not a barrier to the success of my organization or objectives if it is not met?
1	Feature is not available and is not on roadmap for at least 6 months	Not required	Is this feature simply a nice-to-have and will not drive any real value for my organization?

Top Capabilities Only

Essential Functionality Questions			
Questions to Ask	Purpose of Asking	Score	Level of Importance
Does your solution follow enterprise-grade security parameters?	Robust security practices are in place to protect your organization's marketing data		
Are you able to set configurable roles and permissions?	Protects marketing data within your organization and only those that need access to certain aspects of plans etc. are granted		
Is your solution configurable to the specific needs of my organization?	Ensures the software can be customized to align with your own internal marketing processes		
Does your solution offer Single Sign-On (SSO)?	Decreases the attack surface – making systems more secure and saves your IT team time and money with automation, integration and password resets		
Do you provide out-of-the-box analytics and dashboards as well as custom reports?	Ability to report on marketing performance in the way that matches your business needs		
Essential Functionality Subtotal:			

Planning, Calendaring & Collaboration Questions		Score	Level of Importance
Does your software enable users to align and track marketing plans against quantifiable goals and aggregate them to different summarization levels?	Ensures plans are aligned to corporate goals		
Can I view the marketing calendar from multiple angles and highlight what's in market?	Enhances visibility and collaboration across marketing		
Will I be able to send a segmented portion of the marketing calendar to a specific audience with automatic updates?	Improved alignment with other teams including sales		
Does the software enable my team to predict the performance of marketing plans in real-time?	Model expected outcomes before taking any action or utilizing resources		
Is there a planning hierarchy that assigns meaning to the levels in a consistent manner across the organization?	Common and consistent taxonomy so planning is approached in the same manner across teams and it's easier to find and compare information		
Can I route marketing activities for approval through multiple levels, with or without signing limits to the right people at the right time?	To provide a seamless approval process with an audit trail		
Is it possible to manage media plans with additional media types and specific segmentation?	Better analyze the performance of media agencies and channels		
Does the solution enable "multi-stage" planning, so that marketing plans can be routed to different people for their input prior to or in conjunction with the review and approval process?	Supports a seamless planning process		
Can project task data be synced with a work management system to ensure the plan expectations are embedded?	Connects tasks with expected outcomes		
Does the solution allow for what-if scenario planning?	Reduce costs and resource utilization and enable marketers to plan for the unexpected		
Planning, Calendaring & Collaboration Subtotal:			

Budgeting & Financial Management Questions		Score	Level of Importance
Does the solution support both bottoms-up and top-down planning?	Ensures budgets allocated down from a high-level and planned costs are entered at the lowest level to enable comparisons and vice versa. This provides a sanity check for marketers.		
Can actual spend data be imported from ERP/EPM and PO systems and linked to corresponding planned activities and investment in the marketing plan?	Real-time spend management with always-on reconciliation		
Does the system track over- or under-spend for each budget line item, program, and department and re-allocate budget as needed?	Flags areas of spend concern and enables greater agility by being able to quickly shift budget to what's working		
Is there a flexible multi-currency management structure which rolls up all spend to a master currency?	View results in the currency that needs to be reported on globally and ensures current exchange rates are applied to marketing costs		
Does the system support separate marketing and finance hierarchies?	Marketing can plan against both campaign and finance budgets, visualize spending from the angle that matters to each team and improve alignment		
Is there the ability to connect, at a granular level, the cost elements of the marketing plan to the GL accounts and cost centers of the finance budget?	Automates budget mapping and eliminates duplicate data entry		
How does the system enable budget requests, manage approved transfers and audit the entire process?	Boosts agility and helps marketers seamlessly request and track budget movement in and out of their marketing plan, including transfers, and adjustments		
Is the system able to manage and track campaign tactics and costs that span multiple years?	Enables marketers to easily schedule and manage recurring tactics and associated costs that span across multiple fiscal years		
Is it possible to analyze cost and budget projections, make comparisons to prior years, forecast future expenditures, and prepare compelling visuals to tell the story?	Financial granularity builds trust in marketing teams and reduces wasted spend		
Can purchase requests be generated with custom forms and approval workflows?	Provides a seamless PR process		

Can detailed purchase orders, receipts and invoices be aggregated into the marketing plan?	Supports a closed loop process		
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Budgeting & Financial Management Subtotal:

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Work and Resource Management Questions		Score	Level of Importance
Is there an ability to view prioritized work queues assembled from properly routed assignments?	Ensures team members understand which projects are a priority		
Are templates provided in the app so that project work can be quickly set-up and launched?	Pre-built project forms enable quicker execution		
Are there custom workflows available depending on the job type?	Alignment to your own way of working		
Is there an ability to view resource needs for each project and their availability?	Faster allocation and re-allocation of resources		
Are marketers able to tag and organize their view of the digital assets in ways that are meaningful to them?	Quicker execution with a customized home screen		
Is it possible to assess the risks of a project or job being completed for various reasons?	Reduce risks and provides greater transparency		
Can labour costs be tracked?	Obtain a truer cost that can be applied directly to the piece of content or project		

Work and Resource Management Subtotal:

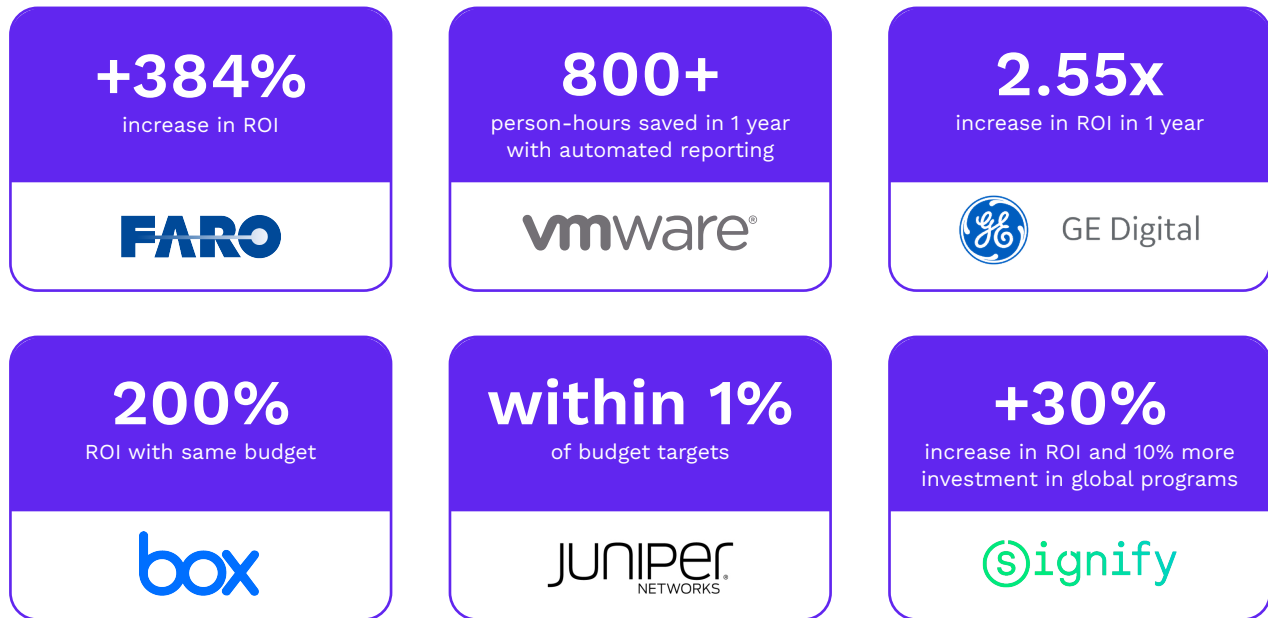
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Asset Management Questions		Score	Level of Importance
Can a large number of assets be uploaded at once with tagging rules?	Boosts content upload efficiency		
Is there a structured, guided process for content creation, review and approval before assets are published?	Provides streamlined and consistent processes		
Is there rights management and version control?	Secure content availability and quality		

Does your system deploy AI based pattern recognition to properly identify and tag images?	Faster content searchability		
Asset Management Subtotal:			
Performance Management Questions		Score	Level of Importance
Is there an ability to tag marketing activities based on their ability to contribute to specific goals?	Alignment of tactics to goals for more accurate tracking of results		
Does the system allow for defined waterfall goals at each stage for both conversion rates and stage velocities based on a demand model?	Analyze insights from your waterfall stages so you can quickly identify what's working and what's not		
Is there a way to set up custom quantifiable goals?	Ensures all activities can be measured against expected performance, even those outside the waterfall stage paradigm		
Can campaign activity data from a CRM or MAP system be ingested so that the plan receives all performance data for reporting and aggregation purposes?	Provides a complete picture of performance, saves time and reduces errors		
Does the system enable the analysis of media performance by medium, channel, creative format, creative agency, ad network?	Enables more productive placements		
Can the performance of plans, campaigns, programs and tactics be stack ranked by specific measures?	Shows which campaigns are performing best to allows for faster decision making		
Is it possible to compare the actual performance of campaigns and programs to model predictions?	Ensures models are kept as accurate as possible		
Are actionable insights surfaced?	Helps identify performance gaps and insights at specific stages that can be actioned		
Performance Management Subtotal:			
Integrations Questions		Score	Level of Importance
Supports integrations with an ERP/ EPM or Finance system	Reconcile actuals to plan in minutes instead of weeks for faster budget reallocation to activities driving growth		

Supports integrations with purchasing platforms	Enables full-cycle financial tracking and ongoing updates of what has been spent and what is outstanding		
Supports integration with work management	Provides a comprehensive view of project and budget status for rapid re-deployment of funds or resources to where they matter most		
Supports CRM/MAP integrations	Tie investment data to campaign and opportunity data, so you can better track performance and optimize spend		
Supports integrations with other DAMs	Gain full visibility of global assets and associated costs across all channels		
Supports integrations with desktop/creative platforms	Ensures that content flows go through the proper review and approval checks		
Supports integrations with marketing performance management systems	Centrally manage and monitor performance data from web analytics, paid media, SEM, social media, and more to automatically quantify KPIs and other metrics		
Supports data lakes and BI tools	Ability to create custom ROI and cost analysis reports		
Supports user management	Centralized access with secure authentication ensures compliance with enterprise security standards and frameworks		
Supports digital ads platforms and can aggregate data from multiple sources	Saves a significant amount of time on monitoring and reporting performance and ensures a consistent approach to measuring success		
Does your system provide enterprise-grade support including third-party assurances such as SOC II or ISO certifications?	Ensures your marketing data is protected		
Do their services include best practices, a phased approach to implementation and ongoing training to ensure your team's success?	Marketing operations software requires change management and if you don't have a partner to assist along the way, the entire project could fail		
Integrations Subtotal:			
Final Totals for all Areas of Consideration:			

The right solution should be able to deliver these benefits:



High-growth brands and Uptempo customers such as AMD, Best Buy, Box, Cisco, Land O'Lakes, Mercedes-Benz, SAP Concur, and VMware are ahead of their peers, as they've spent significantly more time on data hygiene, connecting their marketing processes, and aligning their teams. This ensures they are well positioned to measure the true impact of their marketing efforts.

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“What took us 850 hours in the last year is now much more automated. This year, we created the same market spend report, and it took us less than 50 hours to get the information ready and reviewed by our leadership team.”

CHETAN CHANDRA
FORMER BUSINESS OPERATIONS MARKETING AND FINANCE

vmware

Who is Uptempo?

Uptempo delivers marketing business acceleration, a new operating model to enterprise organizations, giving CMOs clarity on the financial and business impact of marketing programs, with the ability to course-correct, capture new opportunities, and fund innovation. Uptempo's marketing operations suite integrates marketing planning, financial, work, and performance management, so teams can plan better, pivot faster, spend smarter, and execute with confidence. A Strong Performer in Forrester's Wave™ for Marketing Resource Management 2022, Uptempo is trusted by more than 625,000 marketers at leading B2B and B2C brands including:



DAIMLER

Deutsche Bank



scJohnson



We'll help accelerate your team's success

Technology is just one part of it. We partner closely with your organization to provide industry-leading assistance and expertise to get your organization on the path to running marketing like a business.

We have over a decade of experience implementing marketing operations solutions, so teams can accelerate their time to market, resulting in a distinct competitive edge. Our teams will implement a common taxonomy, assist with new processes, provide change management best practices, and set up the KPIs that matter to your business.

30+

Years of helping marketers transform their operations

17,000+

Marketing pros like you trained globally

1,200+

Uptempo solution implementations

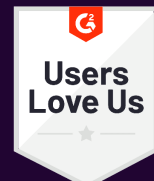
1,050+

Integration projects completed

In The Forrester Wave, Marketing Resource Management, Q3 2022, Uptempo received a perfect score for Supporting Services.



FORRESTER®



Ready to take the next step?

Contact us at sales@uptempo.io and we will help you build a complete business case for a marketing operations solution based on your unique capability enablement needs.



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