


Getting buy-in from stakeholders for your marketing operations software investment

Implementing new marketing operations software involves change and requires alignment with key stakeholders during the buying process. According to Gartner, complex B2B solutions typically involve six to 10 decision makers who must gain consensus despite having different priorities.

Before evaluating software options, identify an executive sponsor or champion (typically marketing operations) who establishes project goals, outcomes, and timelines. It's best to engage all stakeholders early and often, including CMO/Marketing Leadership, Marketing Finance/budget, Technical/IT, and Procurement. Next, work with each stakeholder to help them understand the benefits and capabilities of the solution and how it will benefit their area, so they can adapt their internal skills and processes to maximize outcomes.

Primary Stakeholder	Why Include
 <p>Marketing Operations Leaders</p>	<p>Marketing operations will be a key user of the platform and need to see and understand how the solution connects processes and what reporting insights are available.</p> <p>This software helps marketing operations be MORE informed, so they focus on strategy versus martech.</p>
What they care about	Questions to engage them
<ul style="list-style-type: none"> • <i>Real-time visibility of marketing plans, budgets and performance results.</i> Marketing operations has difficulty confidently reporting on impact as disparate systems, inconsistent tracking and unstructured data makes it difficult to get the full picture of performance. Without seamless integrations and one source of truth, it is arduous to analyze marketing's impact within the context of the initial plan. • <i>Boosting marketing efficiency.</i> Operations leaders need to be able to help improve decision-making when campaigns and programs are still in-flight. 	<ul style="list-style-type: none"> • Would you like to be able to predict marketing outcomes and run scenarios before deploying resources and dollars? • Do you wish you could spend more time on strategy recommendations versus reporting? • Do you want to shorten the decision-making process with real-time insights on how marketing is performing? • Would you like to significantly shorten planning cycles? • Interested in improving budget accuracy within 1 or 2%?

- *Ensuring marketing meets KPIs and adheres to compliance requirements.* Marketing operations managers need to constantly prove marketing's value, even despite ongoing shifts in strategy and resource constraints.
- *Supporting agile teams and processes.* With uncertain market conditions and as technology continues to advance rapidly, marketing operations teams need to be able to adjust processes, resources, systems, and data to support agile planning and execution.

Primary Stakeholder



CMO or someone who represents their interest such as a **Marketing Chief of Staff**

Why Include

To ensure the software meets the CMO's reporting needs for the rest of the C-suite and board of directors

This software helps CMOs be **MORE strategic** with plan, budget and performance visibility at their fingertips.

What they care about

- *Instant access to all marketing plans and budgets.* CMOs need to understand what's happening, where they are spending, and why — quickly and easily, so they can capitalize on market opportunities.
- *Greater team productivity.* Improving workflows, approvals and integrations reduces latency and errors, allowing CMOs to do more with less.
- *Enabling their teams to pivot when they need to shift strategy quickly.* Any project, technology, or change that happens must set their team (and themselves) up for success. And they need to be able to move dollars and priorities around, and with greater agility and speed.
- *Providing accurate reports and insights to share with the C-suite and board members.* They must be able to confidently report on plans, budgets and results. And they require the ability to look at spend from a variety of perspectives including spend type, region, product, initiatives and more.

Questions to engage them

- What is your level of confidence in your current performance reporting?
- Do you want to understand which campaigns are delivering the highest ROI at any point in time?
- Are you able to determine the best marketing mix for your investments today?
- Do you know how to allocate the budget if you receive a 20% increase this year?
- Looking for a better way to ensure top-level strategic decisions are carried down to the tactical level?
- Need to know where to spend your next dollar and why?

Primary Stakeholder	Why Include
 <p>2-3 Marketing Leaders who own large budgets</p> <p>Example: Leaders in Demand Generation, Brand, Field and Event Marketing</p>	<p>Marketing budget holders will be a key user of the platform as they will need to enter in their plans, track budgets and view performance results.</p> <p>This software helps marketing managers be MORE effective so they can focus on core deliverables versus administrative tasks.</p>
What they care about	Questions to engage them
<ul style="list-style-type: none"> • <i>Reducing complexity in their day-to-day job.</i> Every day, marketers have dozens of actions they could take — when new tools or processes are introduced it must provide clear value on why they should adopt it. • <i>Clearly communicate plans and budgets to their manager.</i> Marketers need to effectively communicate their approach and the progress of programs and campaigns to their manager. It's also important that finance and marketing are able to see the same views to enable better decision-making. • <i>Avoiding time wasted dealing with finance data and administrative tasks.</i> Marketers are not finance experts (it's a whole different language), they want to spend time on their job and not worry about things like reconciliation or accruals. 	<ul style="list-style-type: none"> • Is there a desire for real-time insights into which programs or campaigns are working or not? • Would you like to have immediate visibility into how much budget you have remaining? • Interested in a more accurate and easier way to measure how your programs are performing? • Want to reduce duplicate spend? • Do you want to be able to run more test and learn strategies with the same budget?
Primary Stakeholder	Why Include
 <p>Marketing Finance Leader or the most senior finance partner to marketing, often FP&A or the CFO and anyone involved in processing purchase orders or invoicing</p>	<p>Finance needs to see what controls are in place to manage marketing spend, and improve budget accuracy, especially now when companies are looking to cut costs. Including your CFO ally can help you model your marketing planning scenarios directly to incremental revenue, profitability, and cost savings.</p> <p>This software helps marketing finance be MORE aligned so they can be a trusted advisor and focus on ensuring efficient use of investment dollars.</p>
What they care about	Questions to engage them
<ul style="list-style-type: none"> • <i>Ensuring both marketing and finance agree on the numbers and greater confidence that marketing is driving growth.</i> CFOs need to be aligned with marketing leaders on how much is required to achieve goals and where spend is at. CFO's also want to clearly understand how marketing is driving business growth (ROMI), both in the short and long term. 	<ul style="list-style-type: none"> • Does your organization need tighter controls on marketing spending? • Do you want to save significant time on the reconciliation process with marketing? • Are you interested in having an accurate rolling forecast for marketing spend? • Do you know at any point if marketing will reach their revenue goals with their planned campaigns?

- *Avoiding time wasted dealing with reconciling marketing spend data.* Most marketing departments lack a standardized process, which results in delays in closing the month-end reporting. Finance needs to be able to see the full picture, from budget to actual results.
- *Balancing risk with performance needs, particularly in a turbulent economic climate.* Finance wants to ensure money is spent wisely and understands that a certain amount of investment is needed to meet corporate targets. They would like to see budget accuracy improve with marketing along with contributing to the growth of the business.

- Are you aware of where there are areas of duplicate spend in marketing?
- Would you like to reduce business risk by ensuring marketing is not over or underspending, so they are better able to hit targets?

Primary Stakeholder



IT/Procurement

Why Include

To ensure the software is compliant with your IT terms, security, and vendor policies.

This software helps IT and procurement gain **MORE visibility**, to support marketing purchase decisions.

What they care about

- *Integrating seamlessly with other marketing, finance, and analytics systems and meet the security standards and privacy protocols of the business.* Less work for the team to consolidate data.
- *Software that is easy to implement and maintain.* IT wants software that is intuitive for marketing teams to use and does not require heavy lifting from their team to implement.
- *Software investments that offer the best value for money.* IT and procurement needs to review a business case for the software which includes improvements to budget accuracy, reduction in time spend by marketers and finance to reconcile budgets etc.

Questions to engage them

- Are you interested in seeing 3 to 5% additional growth to your company's bottom line?
- Do you want to reduce marketing's tech stack with an end-to-end platform that seamlessly integrates into multiple systems?
- Are you interested in marketing teams using a system that reduces your Total Cost of Ownership?