

The New Roles That Will Power Your Marketing Operating System

by Sheryl Pattek
February 8, 2016

Why Read This Report

As empowered customers take control of their relationship with brands, CMOs must redefine their organization in the form of a marketing operating system (MOS) that best supports the full customer life cycle. A MOS-based organizational design requires roles that don't exist in today's marketing structure.

This report is an update of a previously published report and defines the new roles that CMOs need to turn marketing from a set of silos into a smooth-running operating machine. Forrester reviews and updates its research periodically to ensure continued relevance and accuracy. This revised edition includes additional supporting research.

Key Takeaways

New Roles Will Be Needed To Power The Marketing Operating System (MOS)

CMOs will execute strategy faster, with more flexibility and adaptability, by adding five new marketing roles -- customer segment owners, operations leaders, a marketing technologist, a content chief, and process managers to their team. Each new role helps fill a void that currently exists in traditional organization structures.

Customer Segment Owners Will Lead the Charge

Appoint customer segment owners whose job is to match customers' needs to your products, services, and go-to-market tactics. These segment owners will prioritize contextually relevant customer experiences at every stage of the customer life cycle ahead of marketing channel optimization.

The MOS Needs A Strong Marketing Operations Center (MOC) To Thrive

Unite the leadership of operational processes, measurement, data collection and analysis, technical capabilities, and digital platforms under a single umbrella -- a MOC. The MOC will help bridge marketing needs and internal technology management capabilities.

The New Roles That Will Power Your Marketing Operating System



by [Sheryl Pettek](#)
with [Michelle Moorehead](#), Ryan Trafton, and Kara Hartig
February 8, 2016

Table Of Contents

- 2 CMOs Need New Team Roles To Make Modern Marketing Hum
- 3 The New Roles Provide The Critical Links To Marketing Success

Recommendations

- 12 Transform Your Organization With New Roles And Hiring Practices

Notes & Resources

This report references previous research and interviews to define the new roles that will strengthen modern marketing.

Related Research Documents

[The Evolved CMO In 2014](#)

[Reboot Your Organization For Modern Marketing](#)

[Use The Customer Life Cycle To Power Your Transformation To Customer Obsession](#)

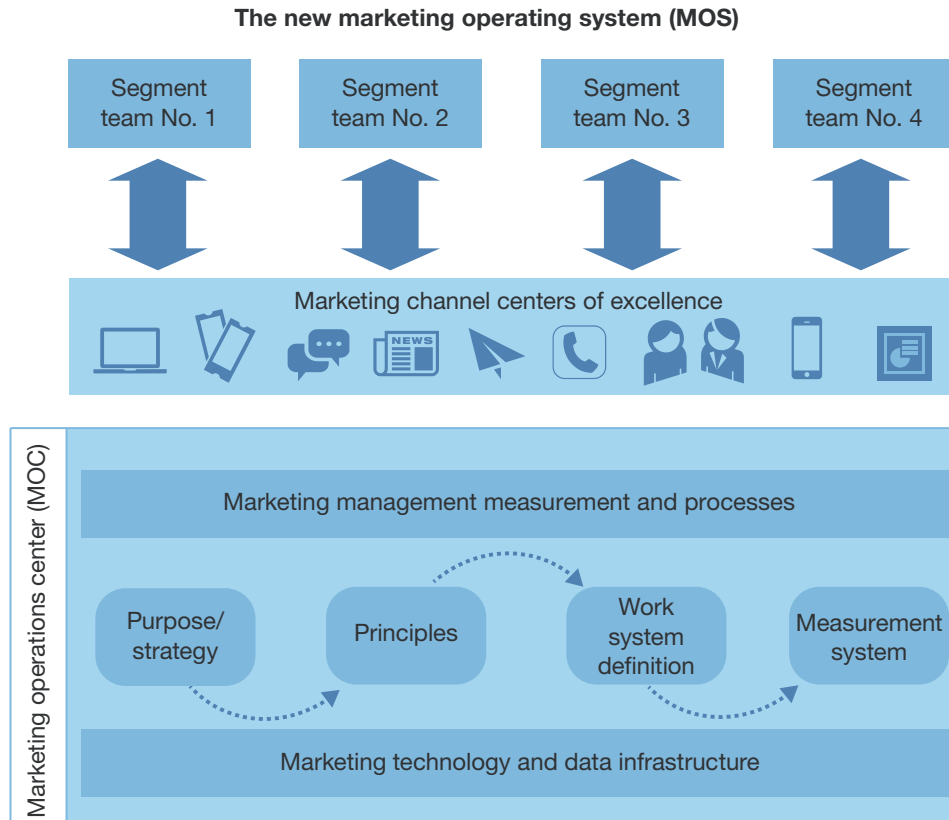
CMOs Need New Team Roles To Make Modern Marketing Hum

To transform marketing organizational design from product- or channel-centric models into a structure that best serves the customer throughout the entire customer life cycle, CMOs must realign their team in the context of a MOS.¹ A MOS creates a fluid design with more collaboration across silos to execute strategy faster, with more flexibility and adaptability, nimbly moving your organization toward winning, serving, and retaining customers (see Figure 1). This new structure:

- › **Prioritizes customer expectations over marketing channel or product approaches.** Today's buyers are channel-agnostic and expect enterprises to deliver on promises consistently, irrespective of the path they choose to take on the road to purchase and engagement. They don't want or expect to be exposed to internal marketing organizational inefficiencies. Adopting a MOS approach to marketing organization prioritizes contextually relevant customer experiences ahead of marketing channel or product needs. It enables marketers and customer experience professionals to match customers' needs and expectations for key journeys at each stage of the customer life cycle.²
- › **Shifts thinking from silos to a holistic view of customer engagement.** To meet these newly empowered customers' engagement demands, CMOs must transform their marketing planning. They need to transition from an approach that optimizes the performance of individual channels to an integrated view that prioritizes all marketing channels and interactions working together — to drive customer purchase, retention, and advocacy.³
- › **Favors agile skills and attitudes ahead of deep domain expertise.** Given the pace of change in marketing today, the ability to innovate quickly and flexibly will separate leaders from laggards. Success will favor diverse marketing teams comprised of professionals who are hired to be dynamic, iterative, and nimble. Teams that prosper will use an agile test-and-learn approach, adopting an “appropriately accurate, not perfect” mantra to quickly capitalize on market opportunities.⁴

The New Roles That Will Power Your Marketing Operating System

FIGURE 1 Marketing Operating Systems Will Define The Future Of Marketing Organization Design



The New Roles Provide The Critical Links To Marketing Success

A MOS-based organization structure requires new roles at both the leadership and the facilitator level (see Figure 2). The MOS approach defines how these new roles must work together to 1) foster engagement across each stage of the customer life cycle; 2) create a holistic view of the customer; and 3) develop an innovative culture of continuous improvement.⁵

At the leadership level, a MOS requires three new roles, reporting directly to the CMO:

- › Customer segment owners to ensure that the needs of each segment are met.
- › A content marketing chief to lead a content strategy that provides the valuable information and stories that attract audiences, build valuable relationships, and generate positive business outcomes.
- › A leader of the marketing operations center (MOC) to provide the strategy, operations, data collection and analysis, measurement, and infrastructure support that the MOS needs to function.⁶

The New Roles That Will Power Your Marketing Operating System

On the marketing frontlines, CMOs need to hire:

1. **Customer segment managers to apply marketing to distinct audiences.** From the smallest gas station or store to the largest enterprise, every business that generates revenue typically has a manager responsible for ensuring its ultimate success. CMOs must approach the business of marketing with the same mindset and appoint customer segment managers (CSMs) who use analytics and insights to understand a specific customer's needs and match those needs to the organization's products and solutions (see Figure 3). CSMs' business plans must engage the right mix of products, services, and marketing resources to create customized strategies, programs, and deliverables for their audience. CSMs must have an innate customer-first mindset and a clear understanding of how to best win, serve, and retain customers for the firm. CSMs must also be collaborative by nature in order to influence and build consensus for the operational plans and measures that ensure profitable customer segment programs and resulting revenue growth.
2. **A content marketing chief to lead the editorial effort.** Content marketing has become a critical way to establish dialogues with buyers as they travel through the different phases of their customer life cycle. The content marketing chief (CMC) is a key leadership role that provides the intellectual property fuel that supports effective engagement with each customer segment (see Figure 4). The CMC should provide leadership and guidance to manage and orchestrate delivery of cross-channel content. The CMC should be accountable for: 1) audience understanding; 2) content message alignment across all marketing programs and channels; 3) style and voice alignment; 4) internal and external resource team collaboration; and 5) the editorial calendar and schedule.⁷

Staff your CMCs internally to ensure that they have an in-depth understanding of the business, the organization decision-making, and the pockets of internal knowledge. But ensure that they have the strong coaching and mentoring skills to work with both internal and external resources to produce the volume and type of required high-value content.

3. **MOC leader.** Similar to sales and service operations, your MOS needs a marketing operations expert to run marketing as a fully accountable business. Marketing operations experts translate the work of marketing into language that aligns to sales, technology management, operations, finance, and business goals. Serving as a key leader in a MOS environment, the MOC leader must set the vision for the organization's technology needs (see Figure 5). Your MOC leader must have a sharp focus on marketing efficiency, performance, financial/budget management, plan monitoring, key performance indicator (KPI) measurement, and dissemination of marketing information throughout the enterprise. These operational enthusiasts should come from finance, sales operations, technology management, or other process- and metric-dominated roles.

Supporting the MOC leader will be two new roles that ensure that technology and process are delivered jointly:

The New Roles That Will Power Your Marketing Operating System

1. **A marketing technologist.** Technology is intertwined into every facet of marketing from digital output to data-driven decisions. CMOs must place the technology decisions across digital channels, data analytics, customer engagement management, digital asset management, and content management under a single skilled player on the marketing team. Serving as the liaison with the technology management organization, your marketing technologist ensures successful planning and timely implementation of the marketing technology stack (see Figure 6).
2. **Marketing process and project experts.** Critical to the success of the MOC will be marketing process experts who facilitate the overall operation of the MOS to ensure that work is continually prioritized, aligned with business goals, and staffed with the appropriate level of resources (see Figure 7). These experts help keep the marketing team humming by managing the process of marketing work, moving the work crisply along from initial concept to delivery. They must possess a unique combination of technical understanding, strong business leadership, people management finesse, political acumen, fluency in data-driven analysis, and strategic thinking skills.

The New Roles That Will Power Your Marketing Operating System

FIGURE 2 New Roles Power Each Part Of The Marketing Operating System

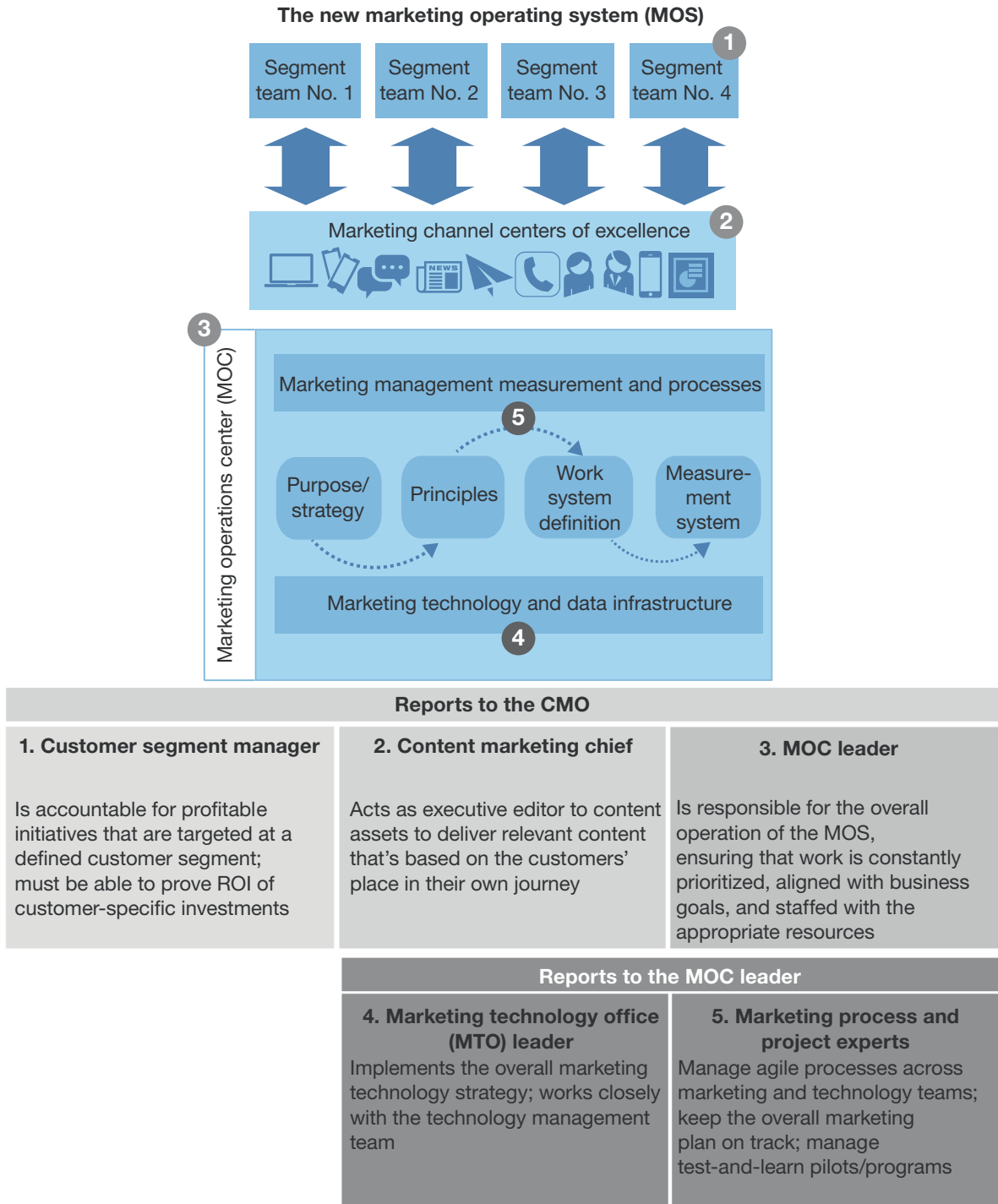


FIGURE 3 Job Descriptions Help Source New MOS Roles — Customer Segment Manager

Customer segment manager

Job summary

Individual is responsible for all aspects of specific, defined customer-segment go-to-market strategy to grow profitable revenue. A customer segment demonstrates differentiated buying behavior. It is defined to meet the needs of a specific business and as such is defined in a wide variety of ways including demographics, psychographics, life stage, customer life-cycle stage, and industry.

Job responsibilities

- Transform customer-segment-specific insights into actionable go-to-market strategies
- Develop segment-specific value propositions, identify appropriate product-mix offerings, develop key marketing programs, and measure results
- Drive the implementation of cross-channel marketing and media plans that are tailored to the customer set
- Balance budget and the right mix of marketing resources to grow revenue in assigned high-opportunity customer segments
- Collaborate internally and with agency partners to ensure that the most effective marketing strategies are put into practice

Desired skills and experience

- Demonstrated ability to lead multidisciplinary teams to successfully grow revenue and market share
- Demonstrated ability to champion change and influence and facilitate results in a complex organization
- Extensive experience in consumer segmentation, database marketing and/or customer relationship management (CRM) solutions, digital marketing, and campaign management
- Excellent relationship-building skills and proven ability to work with others, especially across team boundaries
- Strong leadership, planning, project management, and problem resolution skills
- Superior communication skills, both written and verbal

FIGURE 4 Job Descriptions Help Source New MOS Roles — Content Marketing Chief

Content marketing chief

Job summary

Individual provides leadership and guidance to manage and orchestrate strategy, creation, and delivery of content across all marketing channels.

Job responsibilities

- Drive the brand's internal and external content strategy across all marketing channels
- Develop and implement meaningful content effectiveness measurements and continuous improvement processes
- Optimize content distribution to ensure that relevant content is delivered to the customer at the right point in the customer's life cycle
- Develop and implement needs-based storytelling using words, images, or audio that draw the right audience to the brand
- Establish content development standards and ensure that content is structured appropriately

Desired skills and experience

- Ability to translate customers' needs into differentiated stories in support of the brand's promise
- Ability to adjust strategies using market input data to maintain alignment with external audience's needs
- Experience in multichannel content creation or multichannel marketing demand creation program management (e.g., publishing, journalism)
- A passion for how to use technology to curate and assess content readership
- Ability to define and manage a set of goals involving diverse content contributors and content types
- Strong project management skills for complex programs
- Successful history of managing editorial schedules and deadlines
- Excellent leadership, negotiation, and mediation skills
- Fluency in web analytics tools, social media marketing applications, and leading social media monitoring platforms
- Experience as a journalist and/or managing content creation resources (a plus)

FIGURE 5 Job Descriptions Help Source New MOS Roles — Marketing Operations Center Leader

Marketing operations center (MOC) leader

Job summary

Individual directs the development and implementation of processes, tools, technology, data collection and analysis, metrics, and initiatives that support and improve the operations of the marketing operating system.

Job responsibilities

- Direct the systems and processes that help manage and measure marketing performance in a systematic, predictable fashion
- Capture and disseminate marketing information including performance metrics, initiative results, and budget status across the entire organization
- Develop and implement tools to provide insights into customer trends and buying behavior
- Collaborate with customer insights professionals to turn data into the insights needed to enhance customer engagement
- Develop, maintain, and distribute marketing dashboards and campaign reports as well as general marketing intelligence, ad hoc queries, and reporting to provide recommendations to all levels of the marketing organization
- Manage the marketing budget and provide regular budget reporting

Desired skills and experience

- Successful track record of leading operational support for complex marketing organizations
- Proficiency with marketing, technology, marketing programs, product marketing, and digital marketing terms and concepts
- Prior successful experiences in interacting effectively with sales operations and eCommerce
- Skills in managing, integrating, and aligning information from multiple sources into actionable insights
- Aptitude to understand data and information and develop related insights to drive business changes
- Demonstrated ability to deliver executive-level and ad hoc reporting including dashboard development
- Ability to develop, implement, and manage processes to improve program effectiveness

FIGURE 6 Job Descriptions Help Source New MOS Roles — Marketing Technologist

Marketing technologist

Job summary

Individual defines and manages the technology strategy and infrastructure delivery to support effective customer engagement.

Job responsibilities

- Define the marketing technology strategy and embed technology understanding into marketing DNA
- Define the business requirements for marketing technology investments to deliver brand differentiation
- Serve as an internal champion for marketing technology initiatives
- Manage the necessary transformational change for marketing technology investments to achieve anticipated impact
- Educate the marketing organization on new technology advances that can enhance customer engagement across the entire customer life cycle
- Serve as the ongoing business owner for data, applications, and systems that support marketing
- Analyze performance and return on marketing technology investments
- Act as the liaison with the technology management organization to ensure that the right technology is selected and implemented in a timely manner

Desired skills and experience

- Demonstrated success in establishing and implementing a marketing technology vision
- Ability to lead technology, software development, and agile project management processes
- Experience in managing the integration of marketing application software across an organization's marketing technology landscape
- Deep domain knowledge of the marketing technology application landscape
- Proficiency with content management, web, social, and mobile platforms and APIs
- Familiarity with the digital advertising ecosystem
- Demonstration of strong leadership and collaboration skills

FIGURE 7 Job Descriptions Help Source New MOS Roles — Marketing Process Expert

Marketing process expert

Job summary

Individual facilitates the overall operation of the marketing operating system, ensuring that work is constantly prioritized, aligned with business goals, and staffed with the appropriate resources.

Job responsibilities

- Manage agile processes to meet marketing organization goals
- Identify the skills and resources needed to deliver marketing executions
- Coordinate the timely delivery of the work across teams
- Provide budget estimates for marketing deliverables
- Manage marketing deliverables to completion on time and within budget
- Ensure that the organization is working as efficiently and effectively as possible to meet marketing plan commitments

Desired skills and experience

- Proficient at managing agile processes
- Demonstrated success in managing complex cross-discipline projects
- Professional certification in project management and/or Six Sigma methodologies
- Deep understanding of business and marketing strategies and concepts
- Ability to facilitate communication between a wide variety of sources, including senior management and across multiple functional areas
- Demonstrated ability to effectively prioritize and execute tasks in a high-pressure environment
- Aptitude to quickly adjust to shifting priorities, demands, and timelines through analytical and problem-solving capabilities
- Ability to work both independently and in a team-oriented collaborative environment

Recommendations

Transform Your Organization With New Roles And Hiring Practices

Your role and the role of your team are rapidly evolving as technology and data increasingly influence customer engagement. But finding the right skills to staff these evolving roles is no easy task. CMOs: To build the team you want:

- › **Identify the hidden talents already on your team.** Conduct a skills and attitudes assessment of your existing team to find the creative thinkers who are adaptable and comfortable with ambiguity. Task them with a pilot project to test their mettle and to demonstrate the effectiveness of a new way of working. Raja Rajamannar, the CMO of MasterCard, built a formal rotational assignment program to identify the right talent to bring a different perspective to the work. The result? Rajamannar identified the team members with the most potential to think differently and developed those skills along with a stronger understanding of MasterCard's overall business operations.⁸
- › **Source needed talent from unlikely places.** Not all future marketers will come with the familiar pedigrees of traditional career marketers. Instead, look in finance, technology management, and operations organizations for people with good product management skills and metrics-crushing consistency. Source marketing technologists from business-savvy technology management resources. Tap local business and engineering schools for project management expertise. Follow Nestlé Purina's, Casper's, and HubSpot's approach by staffing your content initiatives with experienced journalists.⁹
- › **Rethink where your agency can contribute to the new structure.** Establish competitive differentiation by building your internal core competencies on understanding customer segments and the best way to serve them. Staff your internal team with leaders who own customer segments, content, project management, operations, and technology infrastructure. Look to your agency partners to supplement your internal resources by providing deep marketing channel expertise to best execute your customer segment approaches.
- › **Get help from industry organizations or consultants to model best practices.** Look to industry organizations such as the Association of National Advertisers (ANA), Business Marketing Association (BMA), Information Technology Services Marketing Association (ITSMA), and Marketing Operations Cross Company Alliance (MOCCA). These organizations focus on business-to-business, marketing technology, and marketing operations, respectively, to build internal knowledge through education programs, peer teaming for career development, and exposure to best practices to inform your internal operations. Business process consultants like Aon and Deloitte Global Services can develop the required job routines and process designs to get the most out of these new team members.

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

Ask a question related to our research; a Forrester analyst will help you put it into practice and take the next step. Schedule a 30-minute phone session with the analyst or opt for a response via email.

Learn more about inquiry, including tips for getting the most out of your discussion.

Analyst Advisory

Put research into practice with in-depth analysis of your specific business and technology challenges. Engagements include custom advisory calls, strategy days, workshops, speeches, and webinars.

Learn about interactive advisory sessions and how we can support your initiatives.

Endnotes

- ¹ Organizational design has not kept pace with the way marketing works in the post-digital age. To meet empowered customers on their terms and prosper in the age of the customer, CMOs must tear down organizational silos and prioritize customer relationships over marketing channel performance. To adapt to customers' rapidly changing needs, rigid organizational structures must give way to a fluid operating system approach. A marketing operating system provides the foundation that ties marketing systems, processes, and outcomes together and allows customer-obsessed teams to deliver the most relevant marketing to defined segments. See the "[Reboot Your Organization For Modern Marketing](#)" Forrester report.
- ² To learn more about how to use the customer life-cycle framework and customer journey mapping tools to align brand, marketing, and customer experience, please see the "[Enrich Customer Life-Cycle Understanding With Customer Journey Maps](#)" Forrester report.
- ³ Campaigns are far less effective at winning and retaining customers than they once were. To achieve sustainable competitive advantage now, you must deliver self-perpetuating cycles of real-time two-way insight-driven interactions with individual customers. See the "[The Power Of Customer Context](#)" Forrester report.
- ⁴ Since 2013, twice as many companies are using agile techniques to create more value for their business, faster. See the "[The 2015 State Of Agile Development: Learn From Agile Expert Firms](#)" Forrester report.
- ⁵ To learn more about the customer life cycle, please see the "[The Customer Life Cycle: A Blueprint For Customer-Obsessed Enterprises](#)" Forrester report.
- ⁶ Consumers are no longer passive "eyeballs" to be tracked, targeted, and messaged to; they're now active and critical in how they hunt for, filter, and consume information and entertainment across thousands of channels. As a result, marketers who rely only on push messaging are struggling to deliver results. To learn more, see the "[Your Customers Demand Valuable Content](#)" Forrester report.

The New Roles That Will Power Your Marketing Operating System

⁷ Savvy CMOs know that contextual, relevant engagement helps their company connect with customers through all stages of the customer life cycle. But communication can become muddled as different stakeholders (marketers, executives, sales, or customer service) engage with customers without the connective tissue of a strong messaging architecture. See the “[Don't Let Muddled Messaging Compromise Customer Experience](#)” Forrester report.

⁸ We know and have proven that a better customer experience correlates with higher revenue growth. Customer-obsessed firms value creativity and speed that they ground in customers’ needs. They are customer-led, insight-driven, fast, and connected — both internally across functions as well as with partners. These principles underpin every aspect of the way they operate. Customer-obsessed firms point to success factors within the structure, culture, talent, metrics, processes, and technologies that run their businesses. Pulling all of these operational levers in concert delivers the biggest impact. See the “[The Operating Model For Customer Obsession](#)” Forrester report.

⁹ Source: Michael Meyer, “Should journalism worry about content marketing?” Columbia Journalism Review, March 2, 2015 (http://www.cjr.org/innovations/should_journalism_worry_about.php).

Source: Jack Marshall, “Mattress Company Hires Journalists,” CMO Today, May 4, 2015 (<http://blogs.wsj.com/cmo/2015/05/04/dont-sleep-on-content-marketing/>).

Source: Natalie Burg, “Top Journalists Are Flocking to Brands. Here’s Why,” Contently, February 19, 2014 (<https://contently.com/strategist/2014/02/19/the-great-journalist-exodus-begins/>).

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

- › Core research and tools
- › Data and analytics
- › Peer collaboration
- › Analyst engagement
- › Consulting
- › Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals

- › **CMO**
- B2B Marketing
- B2C Marketing
- Customer Experience
- Customer Insights
- eBusiness & Channel Strategy

Technology Management Professionals

- CIO
- Application Development & Delivery
- Enterprise Architecture
- Infrastructure & Operations
- Security & Risk
- Sourcing & Vendor Management

Technology Industry Professionals

- Analyst Relations

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.