

1

Create a Marketing Operations Charter

This document should articulate your goals, as well as potential job roles, for the operation. You may start small, assigning a single member of your marketing team to marketing operations. Or, you may plan to build a larger team, which may require you to hire a number of qualified candidates.

2

Assign or Hire a Marketing Operations Team

First, hire your marketing operations manager, whether by assigning someone from within the company to the position or by hiring someone from outside the organization. Then, instruct this new manager to hire additional employees for the team, if necessary.

3

Define Your Marketing Technology Stack/Structure

Enumerate all of the current marketing technology that your organization uses to track customers and sales and marketing results. Then, determine if marketing operations requires any additional technology tools in order to function properly.

4

Choose Effective MOPs Metrics

Select the metrics that your organization is going to track in order to assess its marketing performance. Identify the portion of such data that your organization is already collecting, and determine how the company is storing and using that data. Next, catalog the gaps in your current data. Now, you can begin developing systems that gather and monitor all of this data. Clearly indicate how and how often marketing ops is going to report on the most important data and marketing results.

5

Understand the Partnership Between Marketing Ops and Sales

A key responsibility of MOPs is to ensure that your marketing and sales departments work well together. Early on, marketing operations should collaborate with sales to define how the marketing and sales teams are going to work together. Such a roadmap should include how the teams are going to communicate about the following: marketing initiatives; prospective customers; and the movement of customers through the sales funnel.