



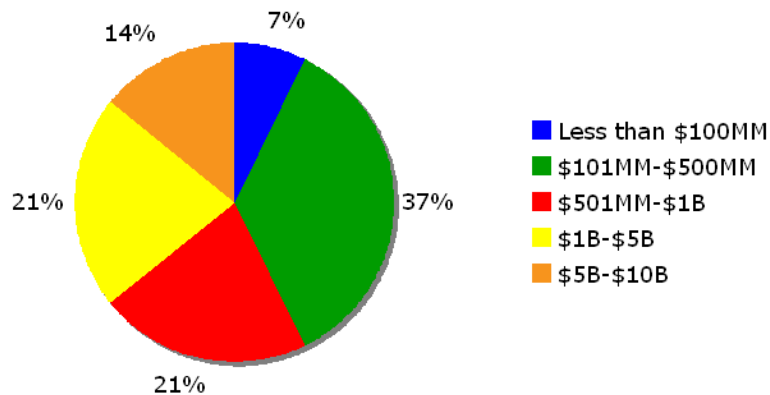
Where Sales and Marketing Meet

MOCCA
Marketing Operations Survey Results

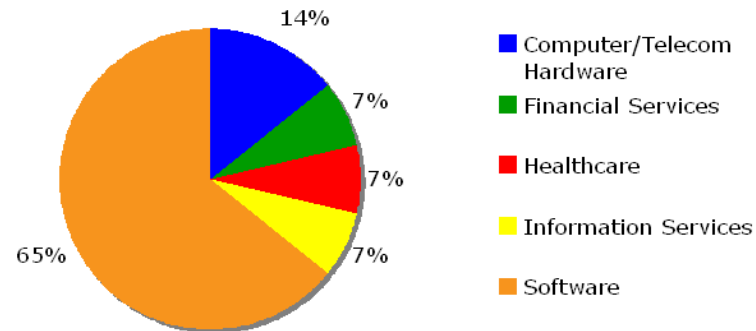
November 2007

Demographics

Revenue Breakout



Industry Breakout



Analysis

- 15 companies have taken the survey to date. This report represents the first draft of findings.
- Data will be redrawn once more people have taken the survey in the next 30 days.
- Report also includes a few SiriusDecisions findings.

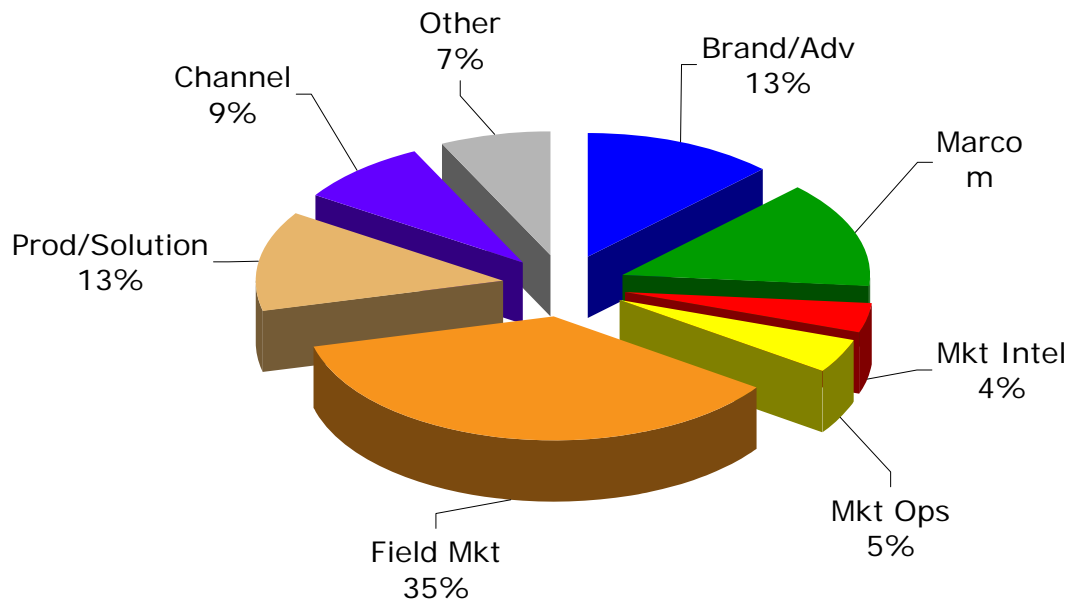
Source: MOCCA Survey

Program Spending

SiriusPerspective:

Marketing operations gets 5% of the total marketing spend today.

Marketing Breakdown



Analysis

Marketing operations programs appear to be a mix of items with very often demand creation being part of the spend.

Over time we would expect less focus on demand creation programs in marketing operations and more focus on leveraging best practices for the enterprise.

SiriusDecisions has found this investment to be 4-6.7%. With a broader peer set this data may change a bit.

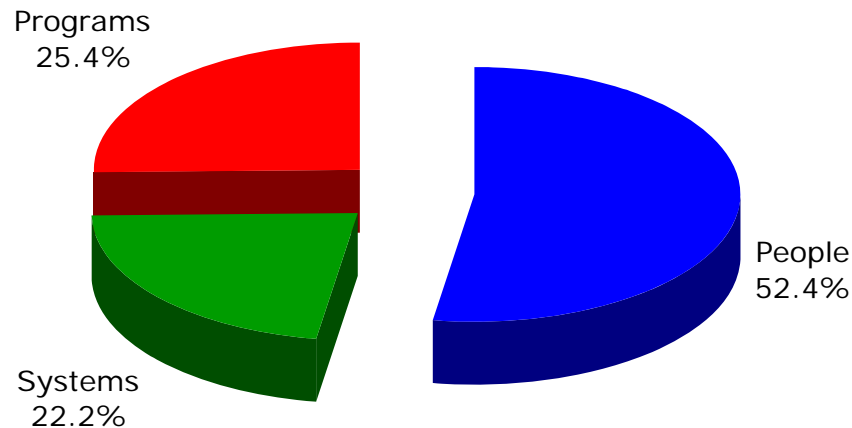
Source: MOCCA Survey

Marketing Operations

SiriusPerspective:

Marketing operations requires more people than program and system investment today.

Mkt Ops Budget Breakdown

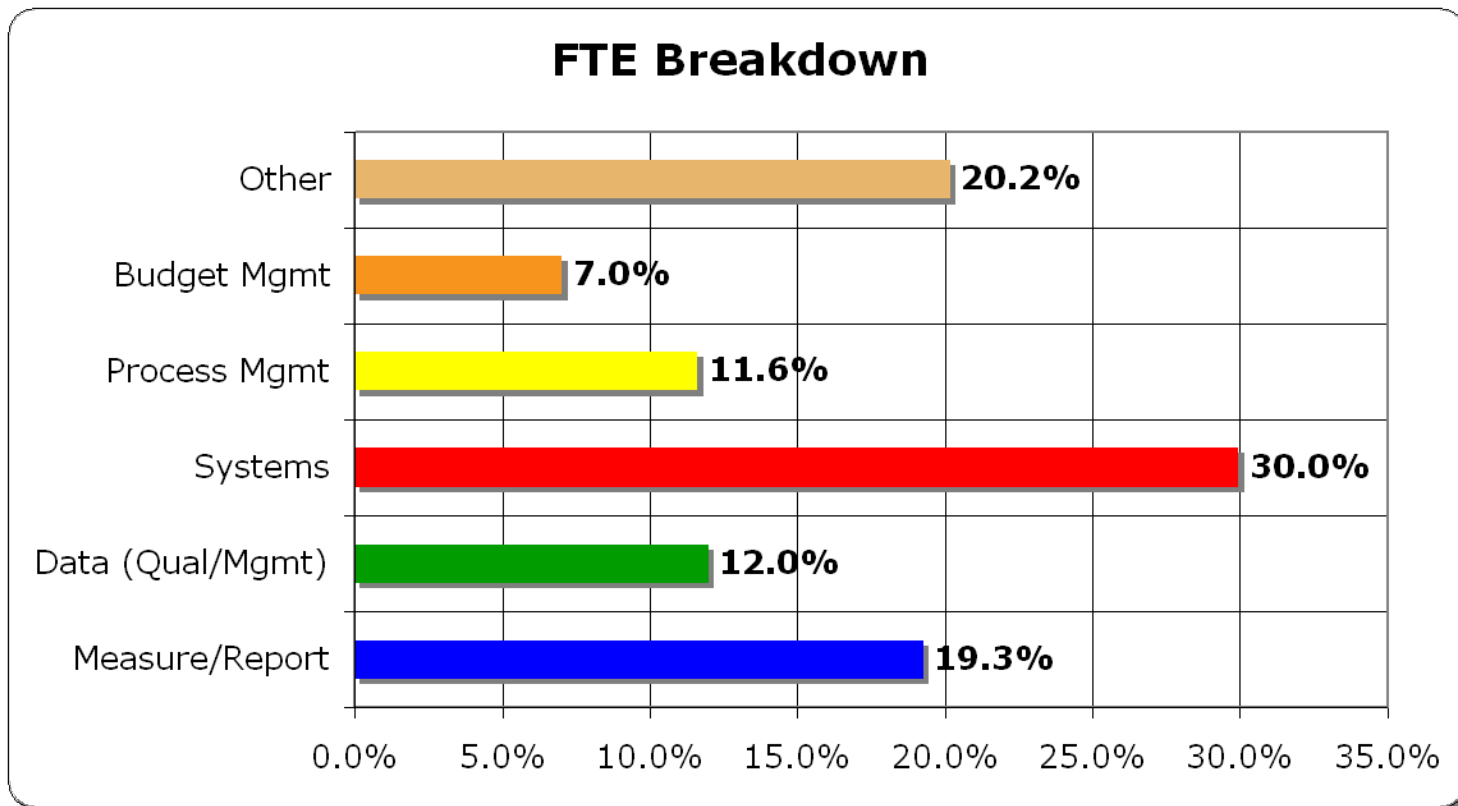


Source: MOCCA Survey

Personnel Deployment

SiriusPerspective:

38% of the total marketing operations investment is focused on systems.



Source: MOCCA Survey

New Responsibilities

SiriusPerspective:

The central role of marketing operations will continue to be focused around process, technology, and marketing investment.

Dashboards

Budget Planning

Infrastructure / Technology

Data Quality

Inside Sales

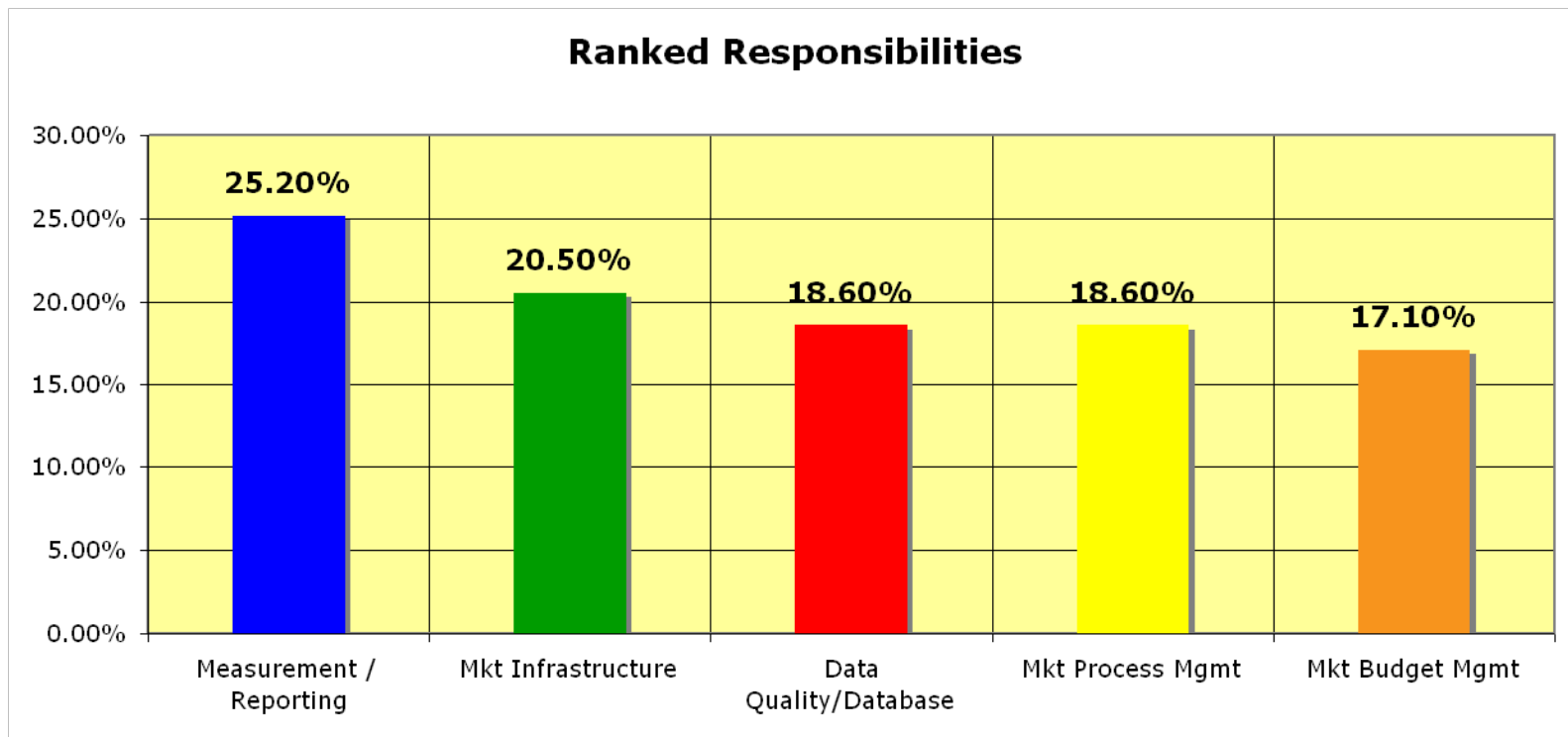
Process Outsourcing

Source: MOCCA Survey

Ranked Responsibilities

SiriusPerspective:

Marketing operations role centers around consistent measurement and supporting infrastructure.

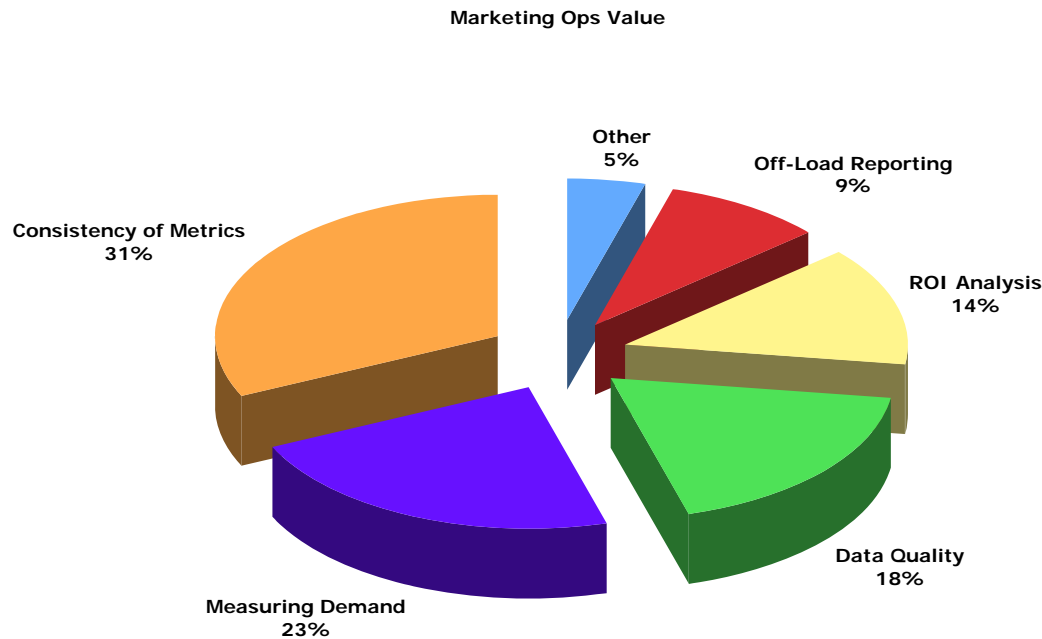


Source: MOCCA Survey

Marketing Operations Value

SiriusPerspective:

Marketing operations delivers value through consistent measurement practices, quality data and being attached to the "demand center."



Source: SiriusDecisions Inc.

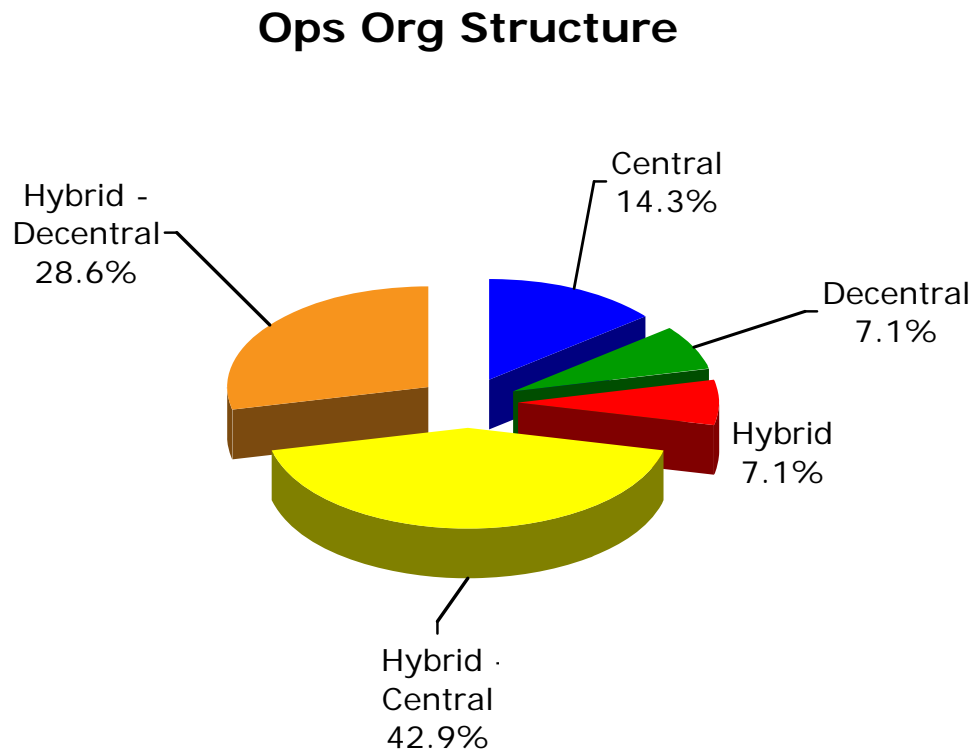
Analysis

- Marketing operations executives are required to deliver value in many ways to the organization. In many cases, expectations of the what marketing operations can deliver is too broad.
- SiriusDecisions believes the more streamlined the role can be on measurement practices, system support, and data quality the greater the value the enterprise will recognize from the function.

Organization Structure

SiriusPerspective:

Marketing operations is centrally focused for the majority of organizations.



Analysis

- Central: All marketing resources central at the corporate level.
- Decentral: All marketing resources centralized at the regional/business unit level.
- Hybrid: Evenly balanced
- Hybrid-Central: Tilted toward centralized
- Hybrid-Decentral: Tilted toward decentralized.
- The central focus is consistent with the charter of the function.

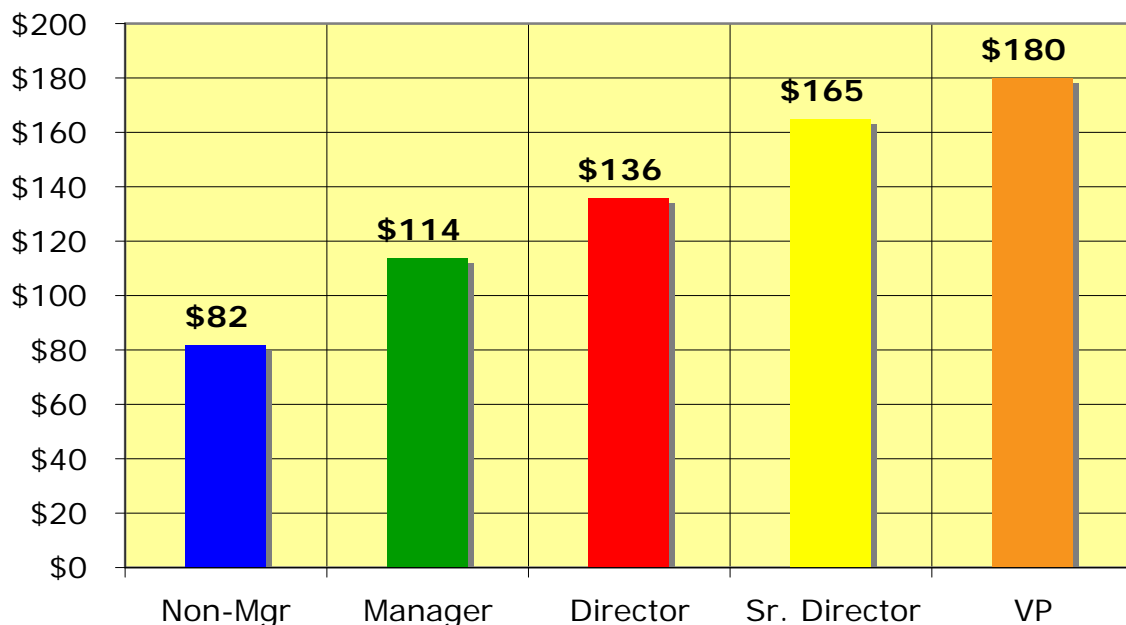
Source: MOCCA Survey

Compensation

SiriusPerspective:

Marketing operations has a logical of compensation today.

Avg. Salary By Ops Level



Salary Ranges

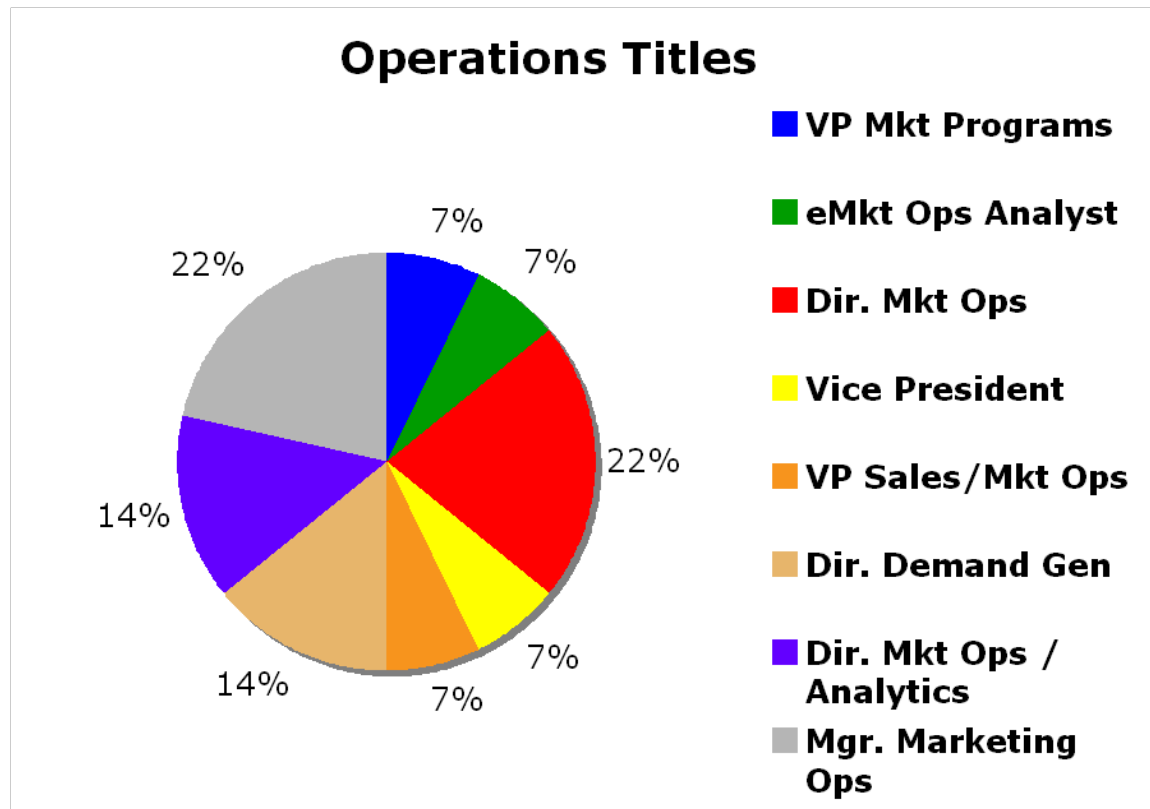
Non-Mgr	\$60-\$105
Manager	\$90-\$132
Director	\$100-\$140
Sr. Director	\$160-\$170
VP	\$150-\$200

Source: MOCCA Survey

Marketing Ops Titles

SiriusPerspective:

The marketing operations role continues to evolve.

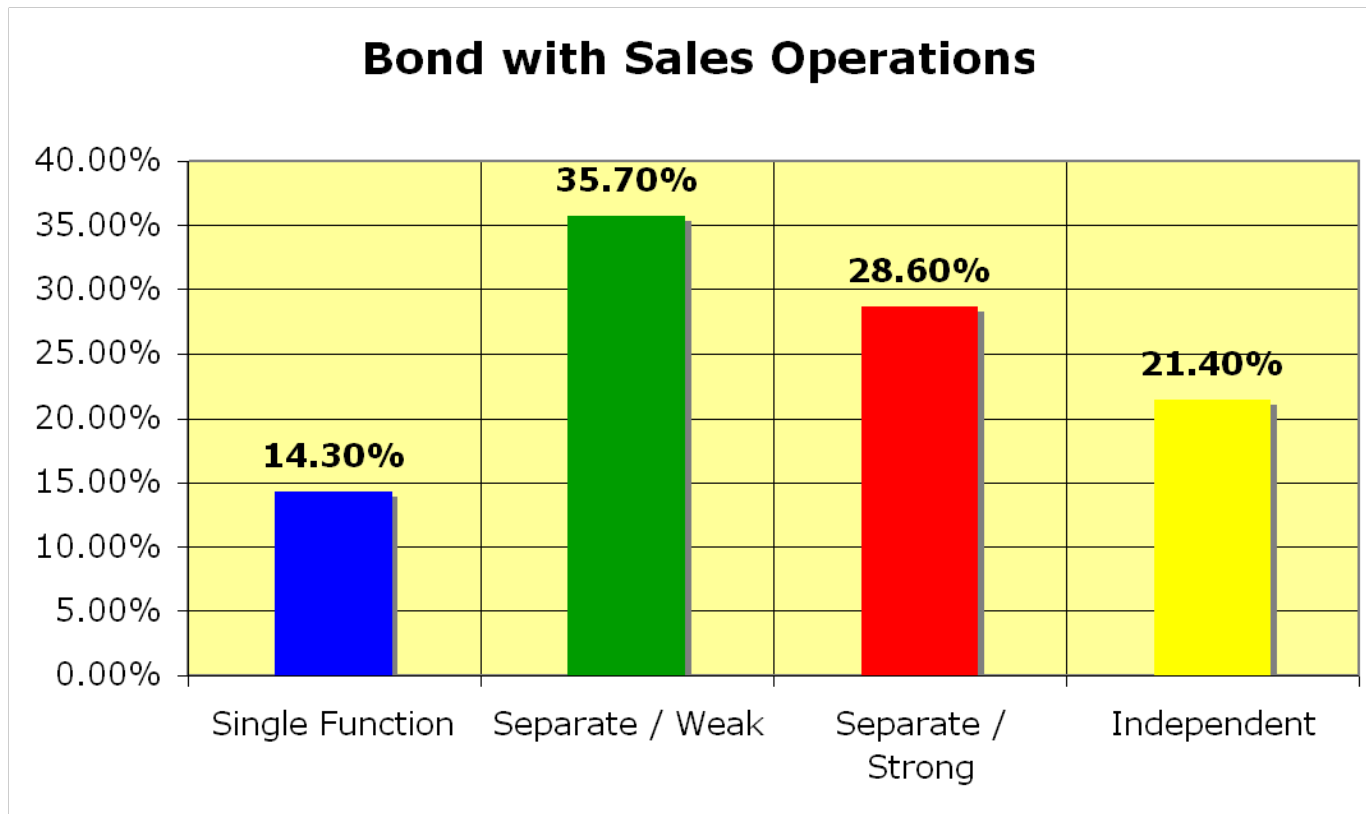


Source: MOCCA Survey

Sales Ops Connection

SiriusPerspective:

There is not a significant bond with sales operations today. This should be focused on in the future.



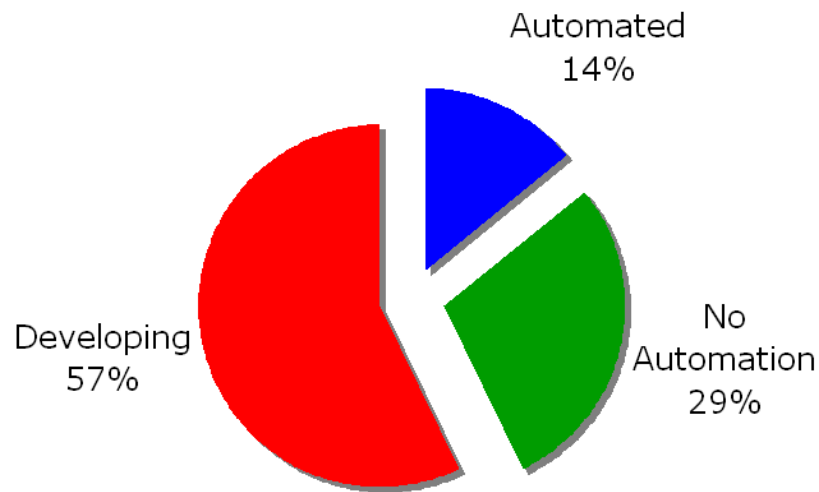
Source: MOCCA Survey

Marketing Dashboard

SiriusPerspective:

Marketing dashboards are work in progress for most organizations.

Dashboard Status



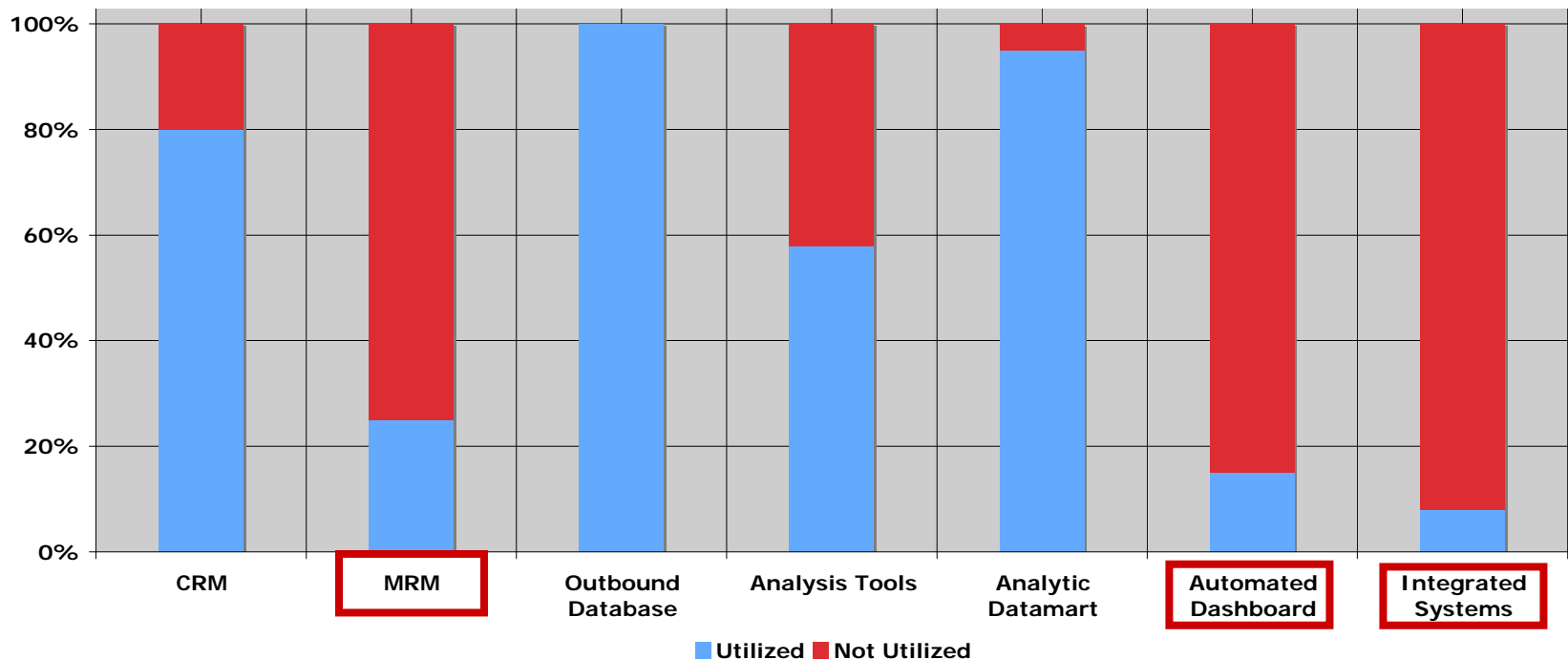
Source: MOCCA Survey

Technology Utilization

SiriusPerspective:

Marketing operations today has limited integration of sales and marketing systems.

System Utilization



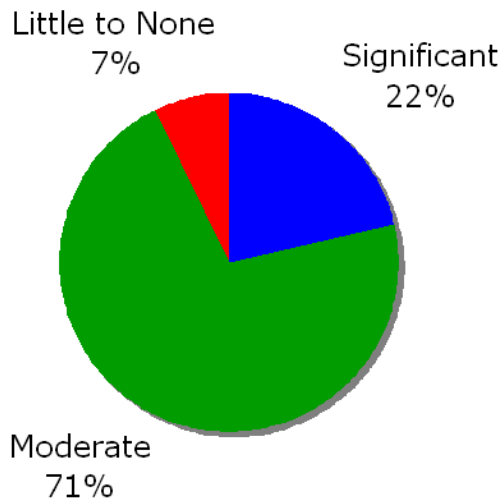
Source: SiriusDecisions

Dashboard Status

SiriusPerspective:

Continued focus on data quality will improve dashboard credibility.

Dashboard Credibility



Analysis

- In previous studies SiriusDecisions found it took six months or more for organizations to get used to a new marketing dashboard.
- Education is required to help determine decisions that should be made with dashboards and how to understand the measurements meaning.

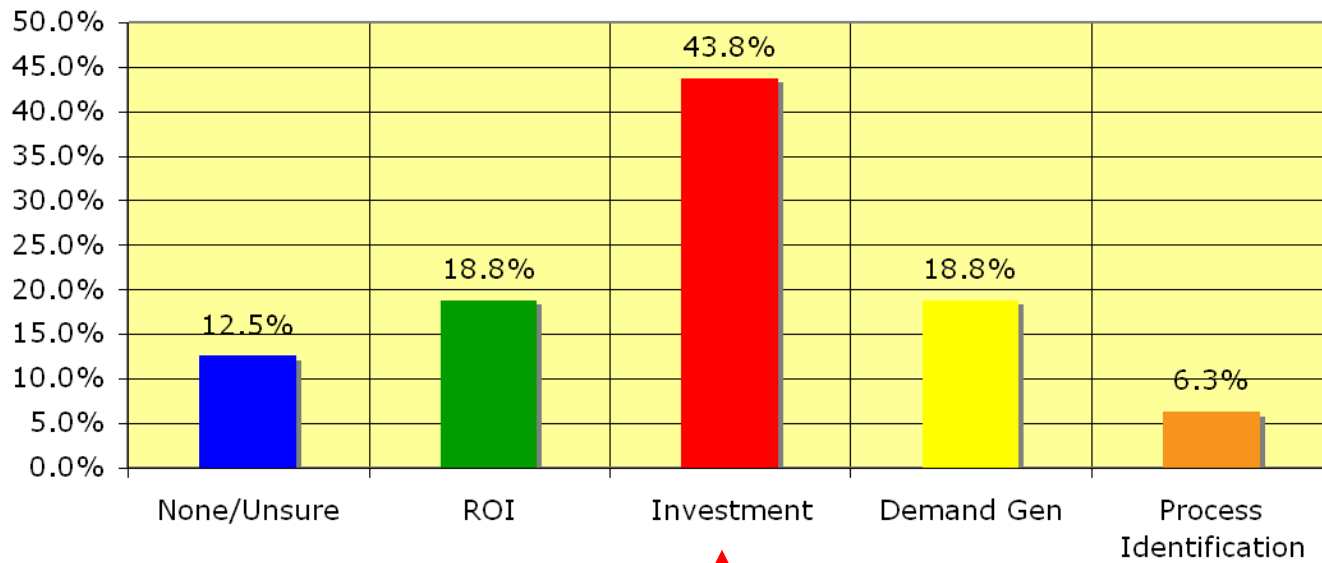
Source: MOCCA Survey

Decisions Made with Dashboard

SiriusPerspective:

Marketing dashboard decisions today have primarily been used for investment decisions.

Decisions on Dashboard



Based on Program Performance

Top Metrics

1. Response Rates
2. Campaign Conversions
3. Marketing Sourced
4. Marketing Influenced
5. Marketing Budget
6. New Customer Acquisition
7. Market Awareness
8. Average Deal Size
9. Pipeline Velocity
10. Sales Cycle Velocity

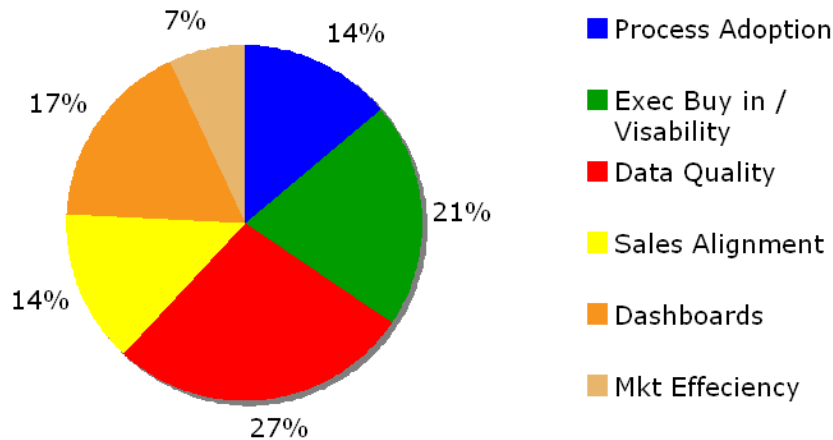
Source: MOCCA Survey

Challenges and Impediments

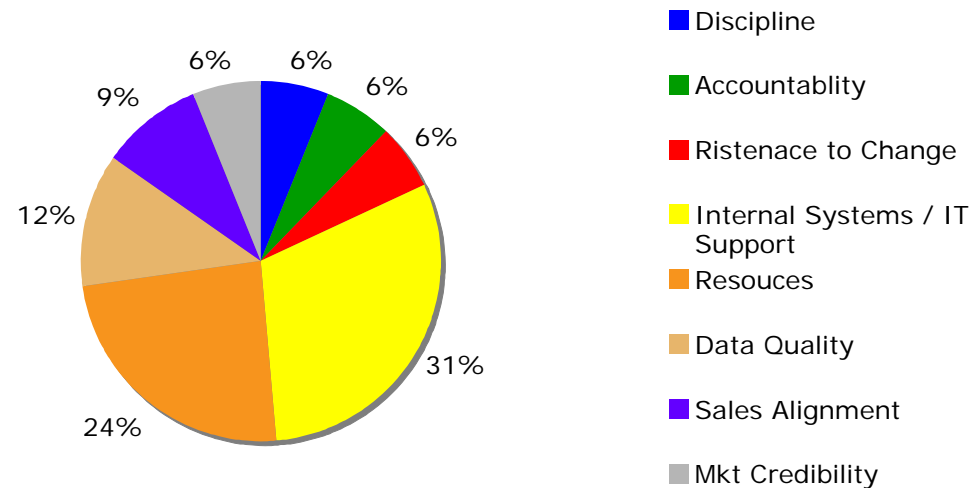
SiriusPerspective:

Data quality, resources and systems are the greatest issues faced by marketing operations today.

Top Challenges



Road Blocks



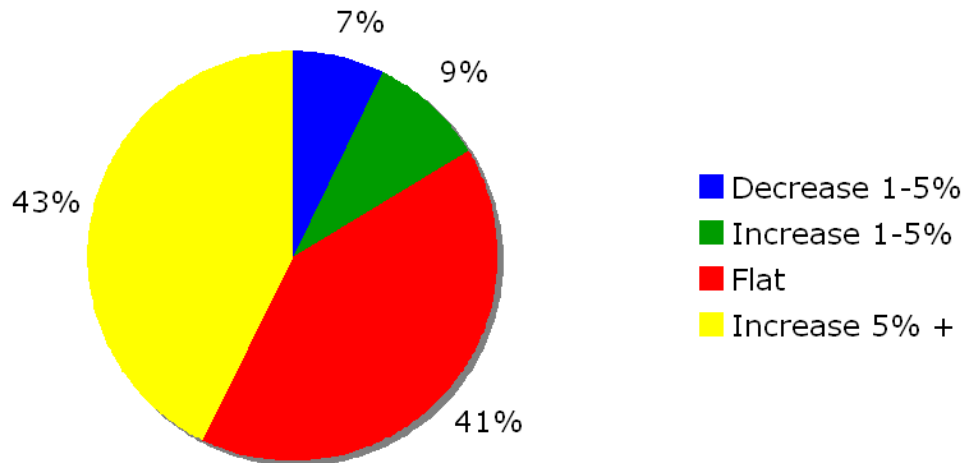
Source: MOCCA Survey

2008 Planning

SiriusPerspective:

Top line growth leads to marketing ops budget growth.

Mkt Ops Budget 2008



Breakout	Ops Budet	Revenue
43%	5%+	10%+
9%	1-5%	5-9%
41%	Flat	1-5%
7%	Decrease	Decrease

Source: MOCCA Survey

Practice Assessment

SiriusPerspective:

The majority feel they have best practices in certain areas.



Summary Findings

- Marketing operations is an emerging function with increasing Importance for the enterprise.
- The role is primarily focused on helping measuring marketing's impact, enabling infrastructure for marketing, and exporting best practice processes.
- Data quality is a significant challenge for marketing operations today.
- Measurement practices and technologies are work in progress for most today.