



## **The Promise of Marketing Operations Management: How to Harness Technology for Marketing Success**

Insights from a webinar presented in association with the Institute for International Research (IIR) and SAS

Featuring:

Chetan Saiya, Executive Director, Global Sales,  
Marketing Operations Management, SAS

It could be a marketer's dream – or a nightmare – to consider the way the marketing environment has evolved in just a few years. With the proliferation of contact channels, you can connect with customers in many new ways. Conversely, customers have more ways to connect with you and broadcast their own messages about you. Even the smallest company can have a global presence. Products come and go at an accelerated pace. Online sources yield terabytes of customer information that can be used to tailor offers at a more personal level than ever.

Whether these realities represent opportunity or chaos depends on how prepared you are to deal with it all. Complexity and intensity in marketing are at an all-time high. So are the expectations for accountability and return on marketing investment.

How can marketers keep pace with the ever-expanding volume of campaigns, customized offers, contact channels and product claims? More than keeping pace, how can they make sure that marketing resources are allocated in a way that delivers the best possible results for the dollar?

In a webinar co-hosted with the Institute for International Research (IIR), Chetan Saiya of SAS described technologies and best practices that enable marketers to not only survive, but thrive, amid these challenges. Saiya's advice stems from more than 14 years of SAS and Assetlink experience working with marketers and their vendors, suppliers and agencies in a variety of industries across the globe.

## **Why Marketing Is More Promising – and Perilous – Than Ever**

Saiya noted that across industries, almost every marketer faces common issues in four broad categories.

### **Fragmentation of the Marketing Medium**

*What is the best way to distribute marketing dollars across so many broadcast and interactive channels?*

The practice of marketing started with a broadcast model: Put out your message in print or on the radio, television and outdoor advertising. In the decades to follow, marketing progressed to include direct mail, telemarketing, email blasts and other forms of outbound communications. Now the messages flow fast and furious in all directions through a variety of interactive online channels, particularly social media.

Some of these new media channels have proven to be more effective than some of the older and more traditional ones. Some new channels are very inexpensive, but people are not convinced they are as effective. Even the low-cost channels that prove to be effective are not a free-for-all, because you have to consider customer preferences. You can't inundate customers with irrelevant offers or excessive communications.

As a result, one of the biggest questions that comes up among marketers is, "Where should I put my money?" Should the big chunk of the media budget that had been used for traditional media be shifted to new media? If so, to what extent? What is the best balance across all these different channels?

### **Globalization**

*How do you maintain global brand consistency while respecting local market differences?*

Thanks to the Internet, even small companies are rapidly expanding their reach. "Just about every brand has been globalizing," said Saiya. "The important issue here is you want to have a consistent brand experience across global markets, but you still need to empower local marketers to adapt to the local cultures, languages, demographics, preferences and so on."

Marketing leaders are conflicted over issues of how much control to retain at the central organization versus how much flexibility to grant to local/regional business units to create products and brand experiences that are appropriate to their markets.

### **Shrinking Product Life Cycle**

*How do you make marketing operations more efficient to improve productivity and go-to-market times?*

Consider how quickly a telephone or PC, for example, goes from being the hottest new gadget to the electronic equivalent of day-old bread. Product life cycles that used to be measured in decades might now be compressed into months or weeks. The pace of change is spiraling faster, and each new innovation and upgrade requires a new set of marketing activities, said Saiya. "How do you continuously churn out the sales collateral, product packaging and all kinds of other marketing materials in this rapid fashion, across the world, in a consistent manner? This has become a very big issue."

### **Regulatory Pressures**

*How do you act faster across global markets, within regulatory and cultural constraints?*

The pharmaceutical industry has long been held to regulatory scrutiny of its marketing practices, but recent years have brought an equal amount of regulatory issues in other industries. Financial services organizations, consumer goods manufacturers and food processors are accountable to standards governing the advertising claims they make. Car makers must answer to environmental and safety concerns as well as performance claims. In an already complex marketing program, how do you ensure that your messages are not only ethical and comply with regulations but are also consistent across campaigns, channels, product models/releases and geographies?

## **Traditional marketing processes and practices are not enough.**

Global 2000 companies spend more than \$600 billion annually to purchase marketing services, develop collateral, run campaigns and sponsor events. Much of this activity is managed in an ad hoc and uncoordinated manner by means of emails, spreadsheets and other rudimentary tools. The resulting inefficiencies lead to higher costs, time-to-market delays and weakened brand value.

Most companies, even small to midsize businesses (SMBs), tend to have multiple lines of business, each with its own marketing programs. There are probably separate teams to manage product launches, integrated campaigns, collateral and events. Within each team there may be separate responsibility for broadcast media, direct marketing and interactive media. Within each of these areas are a variety of tactics, vendors, services, resources, schedules, metrics and so on.

“All of these activities tend to be carried out in silos,” said Saiya. “Information about marketing activities and results sits within individual desktop documents, such as Excel spreadsheets and Word documents. As a result, there isn't a good view of who is doing what, when, what was generated and how well it performed.

“This scenario was fine when the media budget was distributed among one or two agencies in broadcast media, but as you start diversifying across multiple media, the communication and coordination among all of them becomes much more important. Without a central perspective, there is a lot of duplicated effort and little institutional learning to improve the next time around.

“Most marketers that we talk to have made it clear that the status quo of doing things in an uncoordinated and manual fashion – or in organizational silos – is no longer relevant. They need a much more comprehensive and integrated framework for managing marketing across the enterprise, a framework that streamlines and optimizes marketing activities in alignment with enterprise strategy.”

## **Technology Answers for the Perennial Questions**

Saiya described technologies that are available today to address the four key challenges.

### **Manage the fragmented marketing environment with an integrated process flow.**

A technology platform for marketing operations management or marketing resource management enables you to manage marketing processes and deliverables in a far more efficient manner, even when marketing activities take place across multiple teams, business units and geographies. In an integrated, closed-loop process:

- **Planning** pertaining to calendars, resources, budgets and performance targets is all centrally managed and approved.
- Approved management plans drive **execution**, supported by built-in capabilities to optimize workflows and track expenditures.
- The process of creating or collecting marketing **content** is automated, with tools to promote collaboration, information access, customization and consistent use.
- **Analytics**-driven reports and dashboards provide an integrated view of anything and everything going on in the greater marketing organization, at summary and detail levels, along multiple dimensions.

“You don’t necessarily have to apply heavy mathematical models to optimize everything because the biggest problem today is about visibility: who’s doing what and how it is being done,” said Saiya. “You can gain some very significant advantages with things like interactive dashboards that display all your marketing calendars, how much money is being spent on various media types, and when we are going to market with which messages. This type of information is readily available today, but it is not being shared correctly.”



Figure 1. With an integrated process flow, marketing activities can be efficiently managed in a broader context.

## Manage global brands with controlled marketing customization.

Enterprises want to manage marketing content in a way that preserves the overall brand experience while customizing it for local market requirements. This is achievable, even simple, with the help of Internet-based technology.

**Think globally.** “The first and simplest thing to do is to create a global repository of all your digital content,” said Saiya. “A lot of companies have already begun doing this. It’s very easy to do, and it promotes consistent use and reuse of existing content, versus reinventing information over and over again. This digital repository brings your whole marketing community together and saves a tremendous amount of money.”

The digital content platform can also provide an engaging, live forum for sharing brand guidelines and rules. What does a solution-level brochure look like? What colors are included in the corporate palette? What are acceptable uses of the company logo?

“Historically, that information has been stored in PowerPoint files and thick binders,” said Saiya. “Making brand guidelines more instructional, live and dynamic – with specific examples demonstrating how to use a brand in different situations – has proven to dramatically improve consistency and strengthen the brands.”

**Act locally.** Marketers can take advantage of technologies that store and share templates for product packaging, signage, advertisements, product collateral and more.

“From headquarters, an organization can control the overall look and feel of a brand identity, control the kinds of messages that are allowed, but also provide the ability for local marketers to select appropriate messages for their markets from within the realm of preapproved ones.

“You get the best of both: central control and local customization. From a central headquarters point of view, you are providing a huge service by delivering the content through a central server, educating everyone as to how the brand should be expressed, and then empowering local marketers to align with local requirements and preferences. This is actually very easy to do. The technologies are available today and proven to show tremendous benefits.”

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■ “Headquarters can control the overall look and feel of the brand identity, as well as approved messages, while local marketers can populate corporate templates with messages selected from the realm of preapproved messages, to conform to cultural and demographic aspects of their individual markets.”

**Chetan Saiya**  
Executive Director, Global Sales  
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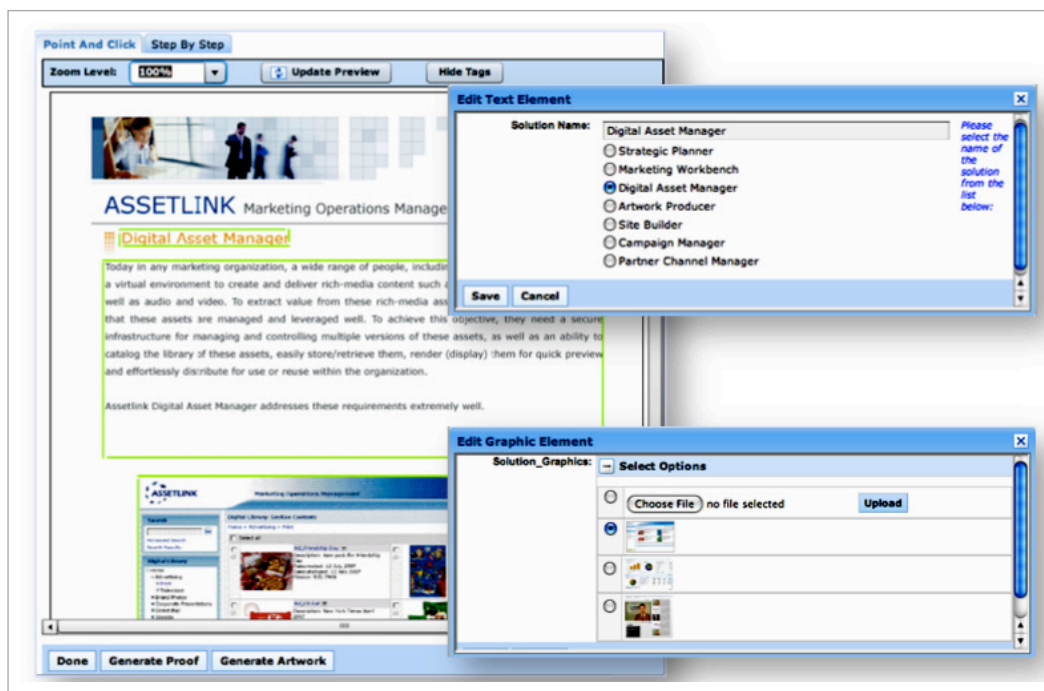


Figure 2. Central control of the brand identity, with the flexibility to adapt to local markets.

**Improve process efficiencies to match the accelerated pace of marketing.**

“Almost every marketer we talk to agrees that we cannot continue to execute marketing processes and activities in a manual manner, through Excel spreadsheets, emails and conference room discussions,” said Saiya. “They need online marketing collaboration tools.

“The good news is that there is a significant amount of commonality across almost all marketing organizations in how marketing programs are carried out and the key types of roles that are involved.” For example, there are requesters who brief the marketing services team on what needs to be done to execute a marketing strategy. There are project coordinators on the marketing services team who turn that briefing into a project and then engage a variety of contributors – product managers, writers, external agencies, media buyers, a webmaster, etc. – to deliver the job.

“The players and the process are quite similar across organizations,” said Saiya. “Another commonality is that rarely is their work managed in a very formalized manner. What is needed is a very consistent framework to manage all these diverse contributors and activities in an automated fashion.”

This is also very easy to do. With a marketing-focused project management system, you can draw your process steps on a virtual white board. The system sets them up as automated processes, and you're up and running. This type of platform dramatically reduces the manual work that marketing teams have been engaged in today, freeing them for more creative endeavors and strategic thinking.

Automated workflow management can improve productivity, Saiya noted. "An industry statistic is that 20 percent of funded projects – funded and approved – do not get launched because of lack of available resources in a specific time period. So the intent was there, the money was there, but the project could not be executed because the resources were not there in the time frame.

"With the visibility and ease of communication afforded by a workflow framework, everyone knows what's pending and what's coming, and they can schedule their times correctly. Organizations can schedule their projects and campaigns, whereby things can go a lot more smoothly."

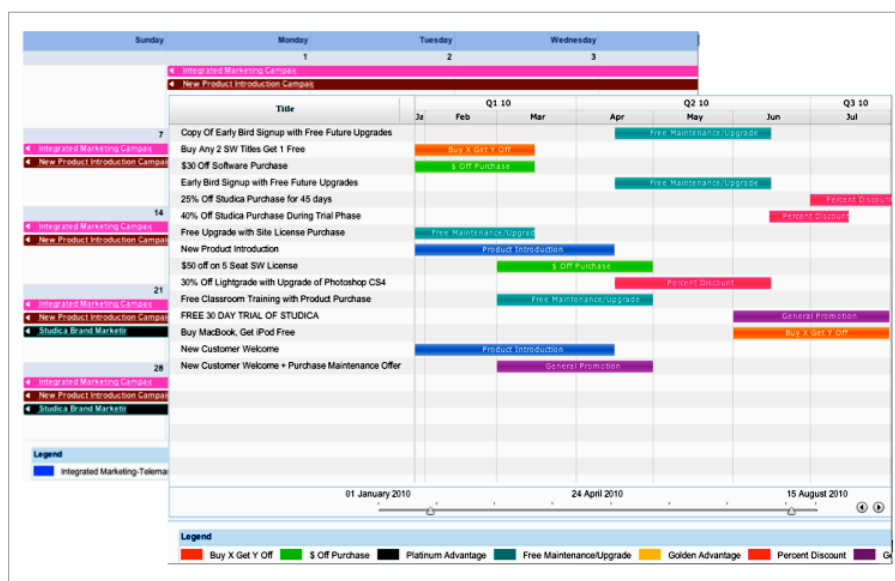


Figure 3. Automated calendars and workflow management improve productivity and time to market.

### Satisfy ethical and regulatory concerns with automated approvals and claims management.

No marketing organization wants to bring unwanted exposure to the company by making false or misleading claims about its products and services – or even by making inconsistent statements in different marketing communications.

To reduce this risk, most marketing organizations are adopting an online approval system, whereby any kind of marketing material being generated – audio, video, printed or online – all gets approved in an efficient and auditable online tool.

In the last few years, organizations have also started adopting automated systems to track the claims they make in their marketing and promotional materials. “Every marketing communication makes claims that your product has certain attributes or functionality,” said Saiya. “Typically there is little control over how those claims are expressed. So every time a piece of marketing communications is created, it must go through a very expensive, time-consuming and rigid approval process that involves a lot of people.

“Now you can create a comprehensive database of all your claims, where you can articulate in detail the context, who can make those claims, and the evidence that substantiates those claims. With the click of a button, you can easily see where a claim is currently being used, all the places where it has been used in the past, and the approved ways the claim can be expressed. More sophisticated systems include translation services to manage claims in multiple languages.

“If a certain claim is no longer true or relevant, you can quickly identify all the places where that claim has been used, and then modify the information across the board.”

## Best Practices for Success

Saiya offered some practical advice for marketing organizations that want to take advantage of marketing management technologies to streamline and optimize their processes.

**Don't overanalyze the problem; just get going.** If this is the first time the organization has considered an enterprisewide overhaul of its marketing management tools, it would be tempting to overanalyze, bring in consultants who spend months writing thick books on the prevailing problems – and in the end only be confused and stalled. Don't overthink it, because it doesn't have to be complicated.

**Keep it simple; focus on one issue at a time.** You're not going to solve every problem in the broad, multidisciplinary practice of marketing in a day. Focus on one issue at a time, starting with the proverbial lowest-hanging fruit, said Saiya.

“In packaged goods companies, for instance, we have found that digital content management systems foster a tremendous amount of collaboration and adoption from day one, and then you can build from there. In financial services, on the other hand, you might focus first on institutionalizing a more consistent and disciplined planning process, so everybody has better visibility into different areas of the marketing process.

“You shouldn’t get bogged down in implementation. You can get good results by starting with only one or two years of historical planning data. When creating a repository of digital assets, it’s probably enough to upload content generated within the last year, because that’s the content most likely to be reused in the near future. You can start adding more historical information over time, if you wish, but don’t let the prospect of a massive information upload deter you from getting started.”

**Get going quickly with out-of-the-box solutions.** “You can get very ambitious in customizing the marketing infrastructure if you want to, but if you have some very specific goals, you can be quite agile in implementing an out-of-the-box solution,” said Saiya. “It is not unreasonable to expect some tangible results within 30 days from the time you sign up.”

**Insist on a user-friendly solution.** “The most sophisticated and feature-rich platform will remain just a dream and an investment unless your business users start adopting it enthusiastically,” said Saiya. “So be fanatical about ease of use. We all are getting used to the new iPhone® and iPad® way of doing things; there’s no reason your marketing systems should be as complicated as your financial systems have been in the past.”

**Publicize the results.** Document the “before” situation and be able to show how the marketing management solution drove progressively better and better results. “Communicate this to management, so they can support you better,” said Saiya, “and communicate this with your user community, because everybody wants to be on a system that’s working for the company.”

## SAS® for Integrated Marketing Management

“Over the last 10 to 15 years, companies have been addressing these marketing challenges through individual point solutions,” said Saiya. “An organization could have a separate planning system, workflow systems, different approval systems implemented by legal and regulatory teams, and digital asset repositories – with none of these systems talking to each other.

“Marketing operations management (often called marketing resource management) addresses all these facets of marketing in a more holistic and comprehensive manner, with a single point of administration and integration across all of these different parts.”

SAS Marketing Operations Management (formerly SAS Marketing Operations Management by Assetlink) provides the capabilities described in this paper in a Web-based solution that helps marketing teams:

- **Get campaigns to market faster.** Align all staff members around a common marketing infrastructure, so they spend less time managing communications between disparate departments and functions.
- **Enable more reuse of existing assets.** Assets are stored within a well-managed framework that employees will actually prefer to use over keeping assets on their own PCs or departmental servers.

- **Achieve greater marketing accountability.** Provide management with complete visibility into schedules, deliverables, costs and performance results.

SAS Marketing Operations Management is ideally deployed as part of the SAS Business Analytics Framework, a comprehensive platform that includes enterprise data integration, a powerful analytics engine, and a rich set of marketing management solutions:

- Data integration capabilities bring together all the data that factors into marketing activities – not just marketing-specific data but enterprise data at large – in an analysis-ready format.
- SAS software’s analytic strength uncovers meaningful insights from that data, such as: how to allocate marketing resources for optimal results, which customers to target with which offers at what time, and how marketing activities influence consumer sentiment as expressed in millions of social media blogs and posts.
- Marketing management solutions provide automated tools to manage the plans, workflows, content and claims of a complex marketing environment.

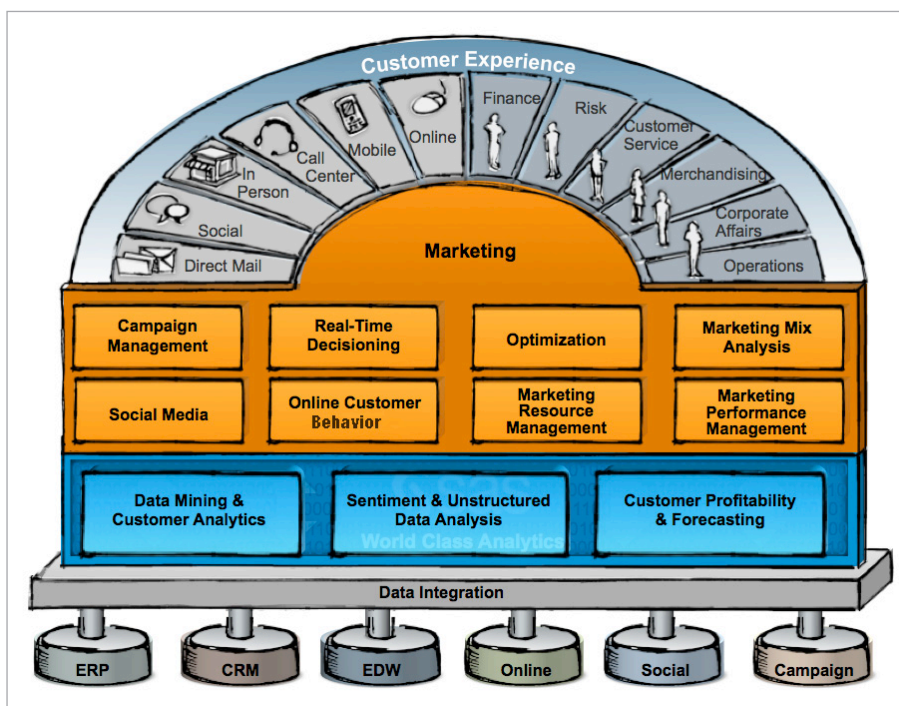


Figure 4. Data integration, analytics and marketing management solutions in an integrated framework.

The most successful marketers of the coming years will be the ones who admit that humans have persisted far too long trying to manage what is not humanly possible – and adopt marketing management technologies at the core of their survival guide.

## About the Presenter

**Chetan Saiya, Executive Director, Global Sales, Marketing Operations Management, SAS**

For two decades, Chetan Saiya has worked closely with leading marketers around the world to help improve marketing efficiency and effectiveness. Saiya pioneered the software category of marketing operations management (also known as marketing resource management or MRM). He founded Assetlink Inc., which was recently acquired by SAS, and also recognized by Gartner Research as a leader in MRM solutions. Saiya has a B.Tech in electrical engineering from the Indian Institute of Technology, Bombay, and an MS in computer engineering from the University of Notre Dame.

To view the on-demand recording of the webcast: [www.sas.com/reg/web/corp/1480380](http://www.sas.com/reg/web/corp/1480380)

For more about SAS Marketing Operations Management: [www.sas.com/solutions/crm/marketing-operations/index.html](http://www.sas.com/solutions/crm/marketing-operations/index.html)



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