INSIGHT MARKETING TECH

Marketing Function Operating Model Kit

Design how your marketing function actually runs: structure, roles, decision rights, planning cycle, intake, the marketing-sales agreement, meeting rhythm and the KPI tree that ties it together.

OPERATING MODEL GUIDE + TEMPLATES

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1. The operating model canvas

An operating model answers eight questions. Write one paragraph for each before changing structure or tools.

Element	Question	Your answer
Purpose	What does the business need marketing to deliver in the next 12-24 months?	
Services	Which services does marketing provide (demand generation, brand, product marketing, content, events, operations, analytics)?	
Structure	How are people organized to deliver those services?	
Decision rights	Who decides priorities, budget, messaging, tools?	
Processes	How does work get requested, planned, produced, launched and measured?	
Technology and data	Which systems support the processes and who owns them?	
Partners	What is done by agencies or freelancers, and how are they managed?	
Performance	Which metrics show the function is working?	

2. Structure options

Model	How it works	Strengths	Risks
Centralized	One team serves all products, regions and segments	Consistency, efficient use of specialists, one budget	Can feel distant from business units; queueing
Embedded	Marketers sit in each business unit or region	Close to the customer and to sales	Duplication, inconsistent brand and data, weak specialist depth
Hub-and-spoke	Central hub owns brand, operations, analytics, shared services; spokes own local demand plans	Balances consistency and proximity	Needs clear decision rights and a strong planning process
Center of excellence overlay	Small expert group sets standards and coaches distributed teams	Raises capability without restructuring	Only works with executive backing and adoption metrics

Choose based on how different your segments are and how much specialist depth you need. Most growing companies land on hub-and-spoke.

3. Decision rights (RACI)

R = responsible, A = accountable (one per row), C = consulted, I = informed. Adjust roles to your organization.

Decision / process	CMO	Marketing ops	Demand gen	Product marketing	Content / brand	Sales leader
Annual marketing plan and budget	A	C	R	R	R	C
Campaign launch	I	R	A	C	R	I
Messaging and positioning	C	I	C	A/R	R	C
Lead scoring and routing rules	I	A/R	C	C	I	C
Tool purchase or change	A	R	C	C	C	I
Monthly performance report	A	R	C	C	I	I
Content calendar	I	I	C	C	A/R	I

4. Planning and budgeting cycle

When	Activity	Output
Annually (before fiscal year)	Revenue target to marketing target translation; budget by program; headcount plan	Annual plan on a page and budget
Quarterly	Review results, re-allocate budget, set quarter priorities	Quarterly plan with 3-5 priorities
Monthly	Performance review against plan	Decisions log
Weekly	Execution and blockers	Updated work board

Intake and prioritization

Every request to marketing goes through one intake form with: requester, business goal, audience, deadline, success metric and budget. Requests are scored weekly and either scheduled, declined with a reason or queued.

Request	Goal alignment (1-5)	Revenue impact (1-5)	Effort (1-5, 5 = easy)	Deadline real? (Y/N)	Total	Decision

5. Marketing and sales agreement (SLA template)

Term	Our agreement
Definition of a marketing qualified lead	
Definition of a sales accepted lead	
Marketing commitment (volume of MQLs or pipeline per month)	
Sales follow-up time for new MQLs	
Minimum follow-up attempts before recycling a lead	
Recycle rules (when a lead returns to marketing nurture)	
Required CRM fields and statuses	
Weekly review: who meets, which report	

> An SLA only works if both sides can see the numbers. Put MQL volume, follow-up time and acceptance rate on the shared dashboard.

6. KPI tree

Link every team metric to a business outcome. If a metric does not connect to the tree, stop reporting it.

Level	Metric	Owner	Cadence
Business outcome	New revenue; retention revenue	CMO with sales and CS leaders	Monthly
Pipeline or orders	Marketing-sourced and influenced pipeline or orders	Demand gen	Weekly
Funnel efficiency	Conversion by stage; CAC; payback	Marketing ops / analytics	Monthly
Program	Results per campaign or channel vs. plan	Program owners	Weekly
Capability	Launch cycle time; request backlog; skills coverage	CMO	Quarterly

7. Capability assessment

Rate each capability 1 (absent) to 5 (strong) today, then the level you need in 12 months. The biggest gaps against the most important capabilities are your hiring, training or partner priorities.

Capability	Today (1-5)	Needed (1-5)	Gap	Build, hire or partner?
Strategy and planning				
Positioning and messaging				
Content production				
Paid media				
SEO				
Email and lifecycle				
Marketing operations and automation				
Analytics and attribution				
Web and conversion optimization				
Sales enablement				
Events and partnerships				
Budget management and vendor management				

> The companion spreadsheet includes editable RACI, intake scoring, capability assessment and KPI tree tabs.

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