

Marketing Operations Fundamentals

UNDERSTAND AND ASSESS

TIME: 45 minutes | OUTPUT: A current-state assessment and a focused 30-day improvement plan.

Name / team: _____ Date: _____

Assess how work actually happens, not how the process is supposed to happen. Invite one person who requests work, one who delivers it, and one who uses the results. Choose a manageable improvement before adding tools.

Key idea

Marketing operations connects people, process, data, technology, and measurement. A healthy process can be repeated, has an owner, and produces evidence. A new tool does not fix an unclear decision or missing handoff.

Example: Campaign requests arrive in several channels and lack deadlines. A focused improvement is a single intake form with required brief fields, one triage owner, and an agreed response window. Measure incomplete requests before and after.

Where does work most often wait, repeat, or fail? Give one recent example.

What does that problem cost in time, missed follow-up, or unreliable reporting?

Which improvement can the team realistically complete in 30 days?

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BUILD YOUR WORKING PLAN

Assess your operating foundation

Score 1 = unclear or ad hoc; 2 = occasional consistency; 3 = documented but uneven; 4 = repeatable and owned; 5 = measured and improved. Use N/A when truly outside scope. Record evidence instead of averaging away serious gaps.

Area	Score 1 to 5	Evidence / friction	Owner / next action
Strategy and planning			
Campaign intake			
CRM and automation			
Data quality			
Lead handoffs			
Reporting			
Documentation / training			

Which gap has the strongest combination of impact and feasibility?

What is in scope, and what will wait until the next cycle?

Which dependency or decision could block delivery?

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VALIDATE AND TAKE ACTION

Completion checklist

- ☐ The assessment includes evidence from real work.
- ☐ One priority has a named owner and a clear boundary.
- ☐ A baseline, target, and measurement source are recorded.
- ☐ Dependencies and required approvals have owners.
- ☐ The team has time allocated to implement and review.

Measure what changes

Choose one measure tied to the problem: turnaround time, incomplete briefs, unassigned leads, or reporting rework. Record the unit, source, baseline period, and target date.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Days 1 to 7: observe, measure, and agree the problem.

Days 8 to 21: implement a small process change and test it.

Days 22 to 30: compare results, document the standard, and select the next gap.

First action / accountable owner / due date:

Open issue / decision needed / approver:
